# Knowall Case Study

## Better Protect

**KNOWALL**

PRIVATE CLOUD COMPUTING

## Mission

Headquarted in Surrey, Better Protect has 25 staff and is one of the UK's leading protection brokers with over 30 years industry experience, selling a range of insurance including life and critical illness cover to consumers across the UK.

## Challenge

Wanted a more feature-rich, affordable, flexible and compliant communications solution that could support growth.

Operations Manager at Better Protect Michael Manning explains, "In the past we were relying on an older CRM system and a hardware based phone system. Our team of advisors relied on dialling out manually to customers which was very inefficient and time-consuming.

We wanted an external IT support company who could best advise us on what systems we would need moving forward to support us as a business, and to recommend a reliable unified communications solution that could link to the CRM system, improve the productivity of our staff and meet FSA compliance"

## Key challenges included:

- Time-consuming manual dialling of outbound numbers

- Out of date CRM system with no integration with phone system

- Poor voice quality of existing system

- No reporting for analysing/improving performance

- Needed call recording for compliance

- Minimal guidance/advice from previous IT support company

## Solution

Michael describes how the challenges were solved, *"Outsourced IT company, Knowall IT stood out as very efficient with the right infrastructure and expertise to advise on what technology would best fit our business requirements. They recommended a completely managed service where we would lease all our IT equipment such as PCs and use a hosted CRM and unified communications solution. We now use the Lunar CRM solution that has been tailored to our specific needs and the SwyxWare unified communications platform that is set up so we have 'click to dial' capability. Advisors simply highlight a number in the CRM application and the call is initiated automatically."*

*"All our staff need is a PC and a headset. They then simply highlight the numbers they need to call from an email or the CRM system. Knowall IT have integrated the call stats so we can display these on a wallboard in real-time and we can view reports on both individual and group performance."*

The sales team use the Swyx softphone and its 'presence' functionality to see the availability of other staff and transfer calls as appropriate. With incoming calls, they can match the number with the information in the CRM system, so they have the relevant details to hand.

## Pay Off

Michael talks about some of the key benefits they have realised, "With the combination of new technology and reporting we have experienced huge increases in productivity with greater quality and volume of leads.

*"Instead of pressing numbers by hand, our sales team can spend more time actually talking on the phone, and with the integration with our CRM they have all the information they need at their fingertips."*

## Improved Reporting, Quality Control and Compliance

*"Within our call centre, Knowall IT has set up a wallboard that displays information in real-time including a leaderboard, so we can see who our top performers are. The depth of management information is much more detailed than before, so we can see instant stats on talk-times and numbers of sales. The status information is also critical, so we can see who is available, who's at lunch and so on."*

With the call recording we can meet any FSA compliance and we can also use the 'silent monitoring' feature to listen into the calls for training purposes. The Swyx system also gives us access to call data records which in turn can be used to measure performance.

"We have also been impressed by the call quality and we regularly use the conferencing functionality to liaise with our range of Insurance providers. Knowall IT provided full training on the Swyx system which is very easy to use and is popular with staff.

## Remote Management of Phone System

"It is also possible to re-direct the phones automatically from a remote location via a web interface. So if we have staff working at weekends or out-of-hours the phones can be configured, whether you are in or out of the office."

## Portability – IT can move with the business

"The advantage of having IT and communications delivered as a managed service means it gives us greater flexibility as a business. For instance in the future if we need to move, we can simply unplug the PCs and plug them in again at a new location and everything's ready to go."