

CASE STUDY



Top 5 Benefits of Clearly Anywhere

1. Geographic Flexibility: Work Anywhere
2. Cost of Ownership is Lower
3. Contact Integration: Save Time & Effort
4. Video & Messaging: Enhanced Collaboration
5. Employee Presence: Team Efficiency

ClearlyIP's Clearly Anywhere Softphone Allows More Flexibility While Maintaining A Professional Presence

MIDWEST[®] Benefits Exchange

OUR CUSTOMER

Midwest Benefits Exchange, LLC located in Appleton, Wisconsin is a Group Health, Life and Disability Insurance Benefits provider. These industry professionals provide an array of risk management and employee benefits throughout Wisconsin.

BUSINESS CHALLENGES

At Midwest Benefits Exchange (MBE), being able to communicate effectively is perhaps the most important of all skills. It enables trusted Advisors to pass sensitive and delicate information to their clients and colleagues and in return for them to understand what is instructed of them. The personnel of MBE now connect with clients very differently from a year ago. Before the Covid-19 Pandemic, meetings with clients mainly occurred at the office or the clients' home. But now, meetings often happen over telephone or video, away from the office, on the go, and from home offices. Being readily available to customers means making it as easy as possible to be contacted. The company has an on-premise phone system in the office with extensions to desktop phones and a centralized voicemail system not congruent with supporting remote work options and requiring staff to make and receive calls from their personal devices. Plus, having to call in and check voicemail daily when not in the office. There are cell phones and call forwarding. But those are not always the best solutions.

Giving clients a business number that will ring wherever an advisor needs to be is a critical part of this position. Given the delicate nature of the communications



between staff and clients, it is imperative that calls can be answered no matter where they are, at any given time, and that they are secure, private conversations.

Easy access to voicemail with a proper Unified Communications Platform would help prioritize calls and urgent messages. Call forwarding often has a pause as you dial into the main number; the same happens with find me/follow me and is just no longer a feasible solution with the migration to remote working.

The ability to make and receive calls from a computer, tablet, or smartphone would help greatly when working from home or on the go—showing the companies main telephone number for outbound calls to maintain professionalism and provide clients peace-of-mind when accepting calls from a Midwest Benefits Exchange team member.

THE SOLUTION BY CLEARLYIP

At MBE, relationships are built and maintained by regular communications. Historically in person but now so much more over the phone. Communication is key to this process – without a useful platform, it would be difficult for them to construct and foster productive relationships properly.

ClearlyIP designed a new communication platform powered by an off-site Cloud-based system. This would allow the employees to connect no matter where they were situated. A new approach with the introduction of Clearly Anywhere, Mobile, and Desktop Softphones supports their flexibility requirements with a remote workforce.

The choice between a softphone and their traditional desk phones came down to the significant differences and advantages. Cost and scalability were a serious benefit with softphones. The cost of adding a new employee to a softphone

is much less, compared to purchasing a desk phone—offering increased flexibility to work from home. For the softphone, the staff just log in from a new location. It's much harder to move the hardwired phone. Implementation is a breeze; a headset with a microphone and the internet is all an employee needs to start using a softphone from either a computer, tablet, or smartphone. It's much faster than configuring hardware.

Professionalism is maintained on a softphone with the outbound caller ID showing MBE's main phone number versus the staff members' personal phone number.

Collaboration would be easier, smoother, and more accessible, improving communication and efficiency.

THE RESULTS

Midwest Benefits Exchange's new communication tech strategy has vastly improved operations and their bottom line. It has also helped the staff continue essential communications and the high level of personal touch with their clients, even during the lockdown when they can't meet face-to-face.

Clearly Anywhere, as a desktop and mobile softphone, is a reliable solution for this client as they wanted a feature-rich and on-the-go business phone. Portability is only one benefit of Clearly Anywhere. Messaging, contact integration, and do not disturb status all put softphones beyond their old office desk phones. Desktop softphones are often associated with remote working as they increase the reach of their business phone system. More importantly, it can open the door for a more geographically diverse workforce. In this case, the employees can also use their Clearly Anywhere desktop softphone not just as a temporary substitute for a desk phone, but as a complete replacement for one even after the lockdown is over.



Clearly Anywhere has been a lifesaver for our team. We are able to connect with clients much easier and conduct secure, private calls. No matter where we are, our office extension is with us and rings our desktop or cellphones, ensuring we are reachable when not in the office.

~ Robert A. Engels, CLU, CHFC Chartered Financial Consultant

