

CM&F Group

Improving Productivity with Analytics

CM&F Group provides unparalleled customer service

CM&F is one of the nation's largest retailers of malpractice insurance for healthcare professionals. In 1947 they developed the first Professional Liability Policy specifically for the nursing practice. While maintaining its leading position in professional coverage, CM&F has continued to expand its personal insurance products as well as its long term expertise in all forms of commercial insurance coverage, including manufacturers and retail outlets. CM&F group is based in New York, but offers policies in all 50 states. Test

"CM&F Group, Inc. — The Malpractice Insurance Specialists — has been serving the insurance needs of healthcare professionals for over sixty years with professional liability products especially designed to safeguard against unique healthcare exposures."

CM&F Group Website

Improving Productivity with Analytics

Generally, businesses change their [phone system](#) only when it is driven by an event, like a move, expansion or some catastrophic failure of the old system. This was not the case for CM&F Group. Chief Operations Officer, Calvin Sullivan, knew that they could improve operational efficiency in a way that would impact revenue if the phone solution provided better analytics with actionable information.

As a firm that strives to keep headcount low, without sacrificing customer service, CM&F needed a way to determine exactly when staff was needed on the phones and when their attention could be turned to other activities.

"Our old PBX system had some reports that could be exported, but the information was difficult to understand and was not all in one place."

Calvin Sullivan

Calvin researched several options and became interested in the ShoreTel solution. After becoming confident that the [cloud-based system](#), unlike consumer VoIP products, had the infrastructure to support both the quantity and quality of calls required, Calvin selected the ShoreTel Sky solution and it was implemented in 2009. ShoreTel Sky was chosen because its [call center](#) analytics were easy to use, yet powerful and actionable.

CM&F was immediately able to use the information to improve office productivity. It was quickly determined that customer support representatives could wear multiple hats and focus on other work when call volume was low. Because peak call times are identified in advance, the team can be ready to manage those calls, so that multitasking does not negatively impact the customer's experience. CM&F now knows how many calls are abandoned and how long callers might wait on hold. They are able to immediately identify problems and modify staffing levels to manage to their support commitment. Rather than hiring part time resources to handle administrative tasks, CM&F can now assign this work to customer service representatives and be confident that outstanding service continues to be provided to clients and prospects.

"Prior to ShoreTel Sky, we assumed that we couldn't use a customer service representative for two jobs without sacrificing phone coverage. Once we saw the data, we realized that it was in fact, possible."

Calvin Sullivan

Finding the Truth About Customer Service Quality

The insurance brokerage business is extremely competitive and CM&F sets itself apart from the competition by providing an unparalleled level of service to its clients. Given the objective to keep staffing levels low, it is critical to CM&F that each representative excel in both productivity and quality. The ShoreTel Sky phone solution is able to help them measure both.

The [call center](#) statistics help identify representatives who are not meeting expectations in one or more of several areas; log in time, number of calls accepted, length of calls, and resolution. Underperforming representatives are either retrained or replaced.

Beyond just quantity, CM&F also needs to understand the quality of the service being provided, so they utilize ShoreTel Sky's [hosted call recording](#) feature. Now, management had a never before available tool to know exactly what happened on calls. This gave them the opportunity to not only retrain or replace those who do not meet expectations, but also to recognize outstanding performers and develop a set of best practices.

"We were surprised to find that some of the representatives we thought were mediocre were really doing outstanding work on the phones. It is great to know who we should work to retain."

What's Next for CM&F?

Businesses like CM&F not only compete for clients, they compete for the best call center agents as well. Recent trends in telework have made the competition even more fierce, as quality customer service representatives are becoming more and more likely to ask to work from home. Traditional [PBX](#) systems are not well suited to supporting a distributed workforce, so until the implementation of ShoreTel Sky, this model was not considered. However, given ShoreTel Sky's [mobility and unified communications features](#), CM&F now has the option to consider remote workers. This might help them not only attract and retain the best agents, but may also make extended hours support for clients on the west coast more achievable. Features like detailed call reporting, regardless of the phone's location, and call recording can eliminate the friction between the flexibility of remote work and CM&F's requirement for consistent standards of service.

Summary of the CM&F /ShoreTel Sky Fit

It turns out that Calvin's instincts were correct. CM&F was able to reduce costs, and improve customer care by utilizing metrics supplied by the ShoreTel Sky phone solution. Customer services representatives are used flexibly to handle other work, but call coverage and quality support remain the top priority.

"The entire staff at ShoreTel has been great. We have recently started to use the support team more, not only for problems, but also on strategic questions about how to use particular reports. You don't usually get [customer service](#) reps that can speak intelligently on the business level."

Calvin Sullivan