

# Fieldpoint Private

## Complete Solution Including Salesforce.com Integration

### Fieldpoint Private Relies on ShoreTel Sky to Ensure Highest Level of Customer Service

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*Joseph Larizza, Chief Administrative Officer, [Fieldpoint Private](#)*

### Challenge: Upgrade Its Call Center to a Cloud-Based Solution

Fieldpoint Private was founded in 2008 by 31 well-known executives in the financial services industry who shared the belief that the biggest banks often did a poor job of serving high net-worth individuals. Their goal was to provide this unique client population with white glove service enabled by superior technology. With fifty employees divided between the New York headquarters and an office in Connecticut, Fieldpoint is quickly becoming a preferred banking institution for ultra high-net worth clientele.

When Fieldpoint Private opened its doors, it used Cisco telephones with the pre-packaged Call Center Express. While this served its purpose for a time, Fieldpoint rapidly outgrew the call center and realized it needed to upgrade in order to keep up with its growing client base. As head of technology, Joseph Larizza, chief administrative officer at Fieldpoint Private, envisioned a [cloud-based telecommunications solution](#). He believes a [cloud-based](#) solution would enable the bank to do three things: focus on its core competency while outsourcing the telecom portion to experts in the field; shift the high capital expense associated with the call center to a more manageable operating expense; and minimize the number of IT staff hours required to support onsite telecom hardware and software. “Phone systems management isn’t our core competency,” says Larizza. “I have limited IT staff and would much rather them concentrate on solutions that can directly benefit our clients than spending time programming phones.”

### Solution: ShoreTel Sky Provides Modern Technology for First-Class Service

After researching several options, Larizza chose ShoreTel Sky phones because of the robust features that were critical to the bank. Bundled with the high-quality, reliable phone system are services the bank immediately utilized. Most importantly to the firm, the ShoreTel Sky phones provide [connectivity to Salesforce.com](#), Fieldpoint Private’s CRM lifeline. All customer account detail, including call history, is recorded here and made available to the advisor as each client’s call connects. The banker can therefore answer the phone prepared and knowledgeable about the account, and accurately chronicle the conversation during the call for reliable future reference. “The depth of integration with Salesforce.com is a unique benefit of the ShoreTel Sky system, providing instant visibility into account data and reducing the number of clicks to log calls and correspondence,” he explains. “We depend heavily on Salesforce.com and having this kind of access to it with a phone system gives us the ability to fulfill our promise to deliver superior customer service.”

Other [features](#) include Find Me/ Follow Me that can be custom-configured to direct calls to multiple phones, eFax that converts incoming faxes into a digital format via email and Phone Assistant to help the receptionist view who is on the phone so an incoming call can be appropriately directed instead of going to voicemail. In order to promise the kind of availability the firm requires for its clients, Fieldpoint Private had to consider a disaster recovery plan for its phone system. When it owned its own network switches, it didn't have an effective disaster recovery solution. The ShoreTel Sky cloud-based solution, however, guarantees that bank customers can reach their banker despite environmental or power issues on location.

## **Results: A Complete Solution**

In a world of big banks and automated call routing, Fieldpoint is truly a different kind of bank. Larizza believes ShoreTel Sky is part of the reason why. "The [support from ShoreTel](#) has been phenomenal," he says. "ShoreTel helped us configure our phones to meet our exact requirements and have gone above and beyond what I expected from a technology partner. The phones give us the capacity to be more mobile and allow us to minimize staff while providing greater responsiveness. They are easy to use, easy to configure and rich with usable features. Finally, we can provide our clients with the highest level of service through the phones' integration with Salesforce.com. It's a complete solution."