

**Industry:** Professional Services  
**Installation:** 4 Locations: 10 ShoreGear IP Voice Switches, 200+ Shore-Phone IP Telephones  
**Date of Install:** May 2006



### Challenge:

Tofias is one of New England's largest and fastest growing accounting and consulting firms. This growth led the company to acquire many disparate telephone systems. Tofias needed to standardize on one system—one that would streamline operations, unify its communications, boost productivity, enhance customer service, and offer cost savings.

### Solution:

ShoreTel provided a comprehensive pure IP telephony solution, including ShoreGear voice switches, ShorePhone™ IP phones, and ShoreWare® Director for end-to-end system management.

### Benefits:

- Least cost routing saves Tofias in toll charges.
- High network resiliency is achieved by matching appropriate carrier services with the distributed architecture of the ShoreTel IP telephony system. Tofias can reroute calls and continue business as usual in the case of an outage in any of the company's locations.
- ShoreTel is easy to administer so management has been brought in house, saving time, money, and hassle.
- Customer service and employee productivity have been enhanced with robust personal and operator call manager features.

## New England's Leading Professional Services Firm Gives ShoreTel and DATAMART High Marks

*Tofias Invests in ShoreTel for Savings, Improved Employee Productivity and Customer Service, as well as System Reliability*

### Summary

Tofias PC is one of New England's largest and fastest growing regional accounting and consulting firms. Ranked among the top 50 accounting firms in the nation, Tofias is an industry leader that provides solutions to privately held companies, not-for-profit organizations, family offices and individuals. In addition, the firm offers a variety of specialized consulting services designed to assist business owners, attorneys, corporate executives, and building owners. With offices in Cambridge and New Bedford, Massachusetts and Providence and Newport, Rhode Island, the company employs nearly 200 full time personnel—experts providing the depth of knowledge and technical expertise previously found only at a national firm.

### The Need for a Switch

In early 2006, Tofias was faced with different PBX-based telephone systems at each of its four locations, including systems from Avaya, InterTel and Mitel. Because Tofias is a rapidly growing organization, having merged with other firms, it was apparent the disparate phone systems would soon get out of hand. Steve Costa, IT Manager for Tofias, decided, along with various members of each department within the organization, that it was time to look at standardizing on one system.

“We knew we needed a system that was consistent across the organization, one in which employees could use 4-digit dialing to call colleagues and one which would provide us with a unified front and a main telephone number for the outside world,” said Costa. “At the time we were also upgrading our backbone and infrastructure, so it turned out to be a perfect time to look at Voice over IP.”

### In-Depth Research

Tofias considered IP telephony solutions from Avaya, InterTel, Mitel and ShoreTel®. After speaking with resellers and integration consultants, seeing product demonstrations, and working with each of the systems in a test scenario, Tofias chose ShoreTel, which was brought in and demonstrated by the IP telephony vendor's New England partner, Wellesley, Massachusetts-based DATAMART. DATAMART is a 34-year-old firm focused on helping companies to improve communications effectiveness, reliability and productivity.

“Once we saw ShoreTel in action, we knew it was the system for us,” said Costa. “We chose ShoreTel for its ease of use and administration, reliability, system integrity, and call manager capabilities. None of the other solutions came close enough.”

DATAMART, which has proven expertise in the field of IP telephony, having installed some of the earliest and most successful Voice over IP (VoIP) and voice/data converged networks in the Northeast, designed the entire solution for Tofias and then followed through with project management, implementation, training and ongoing support. DATAMART deployed six ShoreGear® 120 IP voice switches for Tofias—three in Cambridge and one at each of the other sites—as well as a ShoreTel ShoreGear TI IP voice switch in each of the four locations and two voice mail servers. In addition, more than 200 ShorePhone™ IP telephones are deployed throughout the organization, including models 230 and 560.



“Once we saw ShoreTel in action, we knew it was the system for us. We chose it for its ease of use and administration, reliability, system integrity, and call manager capabilities. None of the other solutions came close enough.”

– Steve Costa,  
IT Manager, Tofias

## Employees Give ShoreTel High Marks

DATAMART supplied onsite training for Tofias employees prior to the system go-live date. Training went quickly and smoothly and everybody was comfortable and ready at the time of the new system switch-over. “DATAMART was very accommodating, driving around to each of our locations to train our users,” said Costa. “Very soon after, I learned the system well enough to train new users. Our employees were receptive to the new system, and as soon as they saw what it could do, they were very happy.”

ShoreTel IP telephony systems are easy to use, simple to manage, flexible, and reliable. With the ShoreTel system in place, all Tofias employees are now on the same phone and voice mail system, using 4-digit dialing to reach co-workers at any location and dialing co-workers by name. All Tofias employees are on a centralized phone and voice mail system, managing their e-mail and voice mail activity in one place. The ShoreTel system also gives each employee a graphical interface on their computer, ShoreWare® Personal Call Manager, which provides Microsoft Outlook integration with employee computers for directory dialing, contact screen pops, and calendar integration. With Personal Call Manager, employees can quickly type in a name, bring up a number, and make their calls from local online directories—all with the click of a mouse, right from the desktop.

“Employees particularly like the ShoreTel features that enhance their productivity, such as dialing by name and checking their voice mail using Outlook,” said Costa.

In addition to Personal Call Manager, Tofias is using ShoreWare Operator Call Manager for each of its four location receptionists. This application provides Tofias receptionists with critical information necessary for exceptional customer service. For example, when the phone rings, a call-routing log displays the caller’s experience within the system to the operator. Before transferring callers, the call-transfer screen displays information about who is available and who is already on the phone. With this unprecedented level of information, receptionists not only connect callers faster than ever, but also give them the highest level of professional service. Also, dynamic, online directories eliminate paper directories – which are usually out of date anyway and not usually available online. With the complete company at their fingertips, along with knowledge about who is available and where a caller has already been sent, the receptionist can transfer using a simple drag-and-drop tool to the most appropriate person—to their extension, cell phone or even their home phone.

“Receptionists love Operator Call Manager,” said Costa. “They can see the status of who they are going to transfer to, see who is available for any other incoming calls, and simply do their job more efficiently. It makes them happier and it raises the bar on customer service.”

## Financially Sound Investment

ShoreWare Director, ShoreTel’s browser-based management interface, allows Costa or one of his colleagues to gain access to the system from anywhere on the network. Through this browser, every site and feature can be managed, including the automated attendant, voice mail, and desktop applications. When a new user is added, an administrator simply clicks “add new” and enters the user’s name; this, in turn, automatically updates the centralized database and voice switches, creates a new mailbox, and updates the automated attendant dial-by-name and number feature and online directories—all in a matter of seconds.

# DATAMART



“ShoreTel has definitely made things easier for the IT staff—it’s very easy to manage and monitor. [And while] we haven’t calculated a return on investment, the obvious savings right away have been the toll charges we save with ShoreTel’s least-cost routing capabilities.”

– Steve Costa,  
IT Manager, Tofias

“ShoreTel has definitely made things easier for the IT staff—it’s very easy to manage and monitor,” said Costa.

Least-cost routing also allows Tofias to capitalize on the existing infrastructure to bypass tolls. For instance, if an employee in the Cambridge office calls a customer in Providence, the call is routed through the company’s data lines, through the Providence branch, and out to the customer, thus bypassing toll charges.

“We haven’t calculated a return on investment, but the obvious savings right away have been the toll charges we save with ShoreTel’s least-cost routing capabilities,” said Costa.

In addition to ease of management and the savings associated with least-cost routing, the distributed architecture of the ShoreTel IP telephony system eliminates any single point of failure, making it ideal for organizations that span multiple locations like Tofias. In the unlikely event of a ShoreGear IP voice switch failure, other switches on the network will automatically take on the call-processing load so no call into the organization is ever dropped.

## A Boost to the Bottom Line

Tofias has appreciated the expertise of DATAMART and is enjoying all the features of the ShoreTel IP telephony system. “The ShoreTel system is great—it saves time during the day and makes everybody’s job much easier—you can’t beat that,” said Costa. “It’s also extremely reliable and easy to use and maintain. In addition, we’re delighted with the service we get from ShoreTel’s partner, DATAMART. We’re very satisfied customers of both companies, and we look forward to working with both for a long time to come.”

### Datamart, Inc.

40 Washington Street | Wellesley Hills, MA 02481  
Phone: 781-235-5520 | Fax: 781-235-7810  
[www.datamart.com](http://www.datamart.com)