INTER-TEL®

Case Study

Sea Breeze Financial Services, Inc. Anaheim, California

PROVIDING A VISIONARY APPROACH TO FINANCING

Sea Breeze Financial Services, Inc. (www.seabreezemortgage.com), headquartered in Anaheim, California, has been funding new home loans for borrowers since 1976. At the forefront of the industry, this diversified real estate lending firm concentrates on delivering flexible real estate finance products and superior client service. Throughout the years, Sea Breeze has steadily grown by expanding the scope of the products and services they provide. These strategies have increased the number of real estate loans processed by tenfold.

At its inception, Sea Breeze concentrated on the resale mortgage market. Now, Sea Breeze has expanded to include all areas of this market, including real estate owned loans, builder tract loans, home equity loans, auction financing, consumer direct, banking and refinancing mortgage markets. Additionally, Sea Breeze focuses on home loans for sub-prime credit homeowners and buyers.

THE BUSINESS CHALLENGE– MANAGING INCREASED CALL VOLUME

Sea Breeze values efficiency, speed, accuracy, cost, and personal attention. They needed a total solution provider who would understand the importance of their values, as well as manage and support the seamless installation of a scalable system that would enable them to increase the amount of calls they handle daily at each of their four locations.

"To Sea Breeze, calls can be equated directly to dollars, both on the sales and service side of the business, and that includes not only inbound calls, but outbound calls as well," explained Eric Brackett, chief executive officer of BTI Communications Group, an Inter-Tel solutions provider.

Brandi Franson, senior vice president of production for Sea Breeze, further elaborated, "When we were using our old system, I was unable to track calls that came in and, when they were lost, I viewed that as potential loans that could [not] be put through our system—a missed opportunity which equates to thousands of dollars for each call."

Before Inter-Tel and BTI became involved, Sea Breeze was utilizing another vendor's communications platform that wasn't designed for the needs of a high volume call center environment. "We tried to evolve it into something we needed, which required a lot of labor, manpower and extra hours. It was incredibly expensive for us," said Franson. "It was really patched together with stick and glue. That's the reason we started searching for a new phone system—we were looking for something that would grow with us," continued Franson.

FAST FACT...

Sea Breeze improved their business performance, increased sales and enhanced customer service levels with the addition of Call Center Suite applications.

THE INTER-TEL SOLUTION– IMPLEMENTING COLLABORATION SOFTWARE

BTI provided Sea Breeze with an Inter-Tel Converged Communications Platform, a flexible, scalable system that integrates with Inter-Tel's powerful Presence, Collaboration and Messaging software, such as Call Center Suite. Call Center Suite is a collection of modular computer telephony software applications that enables Sea Breeze to access real-time and historical reports of all telephone system and call center information, as well as survey real-time data on queue status, including alerts when queues were full or when service levels were not being met. Additionally, Sea Breeze was able to publish individual agent and group statistics and forward this information to the appropriate users, allowing them to gauge their performance levels. The deployment of Call Center Suite solutions ultimately allowed Sea Breeze to optimize their call center performance and improve customer service.

"The Call Center Suite solution is a fabulous tool for us in a call center environment. We take calls now that used to be abandoned calls where we had no way to track that call and/or get hold of the customer. Now with Call Center Suite, I can create a report with that number and I can track any person that has called and couldn't reach a loan consultant," Franson explained. "In our business," added Franson, "time is money, and numbers that are lost are very important to us. Call Center Suite has been an invaluable tool."

According to Eric Hatfield, lead implementation engineer for BTI, "The management tools that it brings to the table for each management team—reporting daily, weekly and monthly—were a perfect application for Sea Breeze." "Now we can pull reports and know exactly what is going on at all times on the floor," added George Britt, director of production for Sea Breeze.

Additionally, BTI recommended Inter-Tel Unified Communicator® software, a powerful Presence Management tool, that enabled Sea Breeze to manage communications with ease. "Unified Communicator has provided us with connectivity among the branches. It is a convenient tool for me personally so I don't have to use my phone—everything is done on my PC. I have access to all of my employees at the touch of a button, which has been a great efficiency for me," said Franson.

Sea Breeze also benefited from the introduction of a progressive dialing software program through Inter-Tel's Peripheral Products division, a third-party solutions provider. "As Sea Breeze was implementing the system, one of the issues was the advent of the National Do Not Call Registry, and they needed a solution for that as well," Brackett stated. "We not only were able to help Sea Breeze be compliant with that do-not-call legislation, we were also able to help them triple or quadruple their actual call volume output, which translates into more sales," Brackett added.

WHY INTER-TEL

With Inter-Tel applications, Sea Breeze was able to improve their operations, streamline employee productivity and increase their levels of customer service.

"The result for Sea Breeze has been increased business performance, increased sales and better ratios," concluded Brackett.

The implementation of a communications system that would allow them to track calls, analyze statistics and make better business decisions was important to Sea Breeze, but they also wanted to make sure they would receive the necessary support and knowledge to allow them to make the most of their new system.

"It's a much more simple system to use. We have the support we need. The folks at BTI are awesome and really have given us all the information that we need to ensure we use this system to the best of its capabilities," said Britt.

A video of this case study on CD is available upon request (Part # 835.2861).

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