



berkeley

INDUSTRY

Financial Services

NUMBER OF USERS

50 Users

CHALLENGE

Looking for flexibility to control phone lines and change settings based on the needs of the business.

SOLUTION

Hosted solution that provided powerful features, HUD, call center features, and the control Berkeley was looking for to manage their own system.

CASE STUDY

Berkeley Payment Solutions Finds a Simple, Flexible Phone System to Grow with the Business

Berkeley Payment Solutions delivers pre-paid Visa and MasterCard programs to financial institutions, corporations and government entities. From its headquarters in Toronto, Berkeley develops and manages these programs, handling accounting, processing, card design and card fulfillment. Berkeley serves more than 500 corporate and government clients in North America and is one of Canada's fastest-growing companies.

Company Needed Control and Flexibility

Berkeley Payment Solutions was using a hosted VoIP phone system from a Canadian telecommunications company, "but there were issues," said Jonathon Hamburg, Berkeley's founder and chief strategy officer. "We were dependent on the telecom provider for support, updates and feature implementation," he said. "That was a problem. We needed something we could manage ourselves. We wanted to have the flexibility to control the phone lines and change settings based on the needs of our business. We were exploring the idea of an Asterisk-based system, but we didn't want to deal with something that didn't have a user interface that would be easy to work with," Hamburg said.

“The Fonality [now part of NetFortris] solution provided powerful features, HUD, call center features, and the control we were looking for to manage our own system. No other provider could come close to Fonality.”

- **Jonathon Hamburg**, Founder & Chief Strategy Officer

No Other Provider Could Come Close

Berkeley prides itself on delivering simple, flexible and effective programs for its clients, so it's no surprise that it was guided by those same principles in developing its IT communications strategy. After researching several phone systems, Berkeley chose Fonality. Paired with Fonality's award-winning desktop call client, Heads Up Display (HUD), which consolidates voice, chat, conferencing, email, and voicemail features on each user's computer desktop. “The Fonality solution provided powerful features, HUD, call center features, and the control we were looking for to manage our own system,” said Hamburg. “No other provider could come close to Fonality.”

Find Me Follow Me Improves Customer Service

“We service much larger companies. The Find Me Follow Me option gives our clients the ability to reach us more easily,” Hamburg said. “And most of the time when people call me, I'm not sitting at my desk. But I can set my phone to ring my desk, cell phone or any other number I choose, so I don't miss client calls. Find Me Follow Me makes it a lot easier to keep calls from going to voicemail, which helps provide a higher level of service to our customers.”

Real-Time Employee Status

Employee Presence soon became one of the most popular features of the new Fonality system. “It gives everyone in the office visibility into all the different queues, who's in the office, and who they can transfer calls to,” Hamburg said. “If I'm going to transfer a call, I don't want to send it to someone who's already on the phone so it just ends up in voicemail. We have improved the overall customer experience by increased visibility into real-time status of our staff.” “Chat has also been so helpful,” said Hamburg. “People often have quick questions that they want to ask each other around the office; and with chat we're able to do so easily and, more importantly, quickly.”

Berkeley Marketing Manager Hugh Vagt said, “Our staff also likes to know if someone’s at their desk or they’re available,” noting that email is an inefficient way to get status information. “With Employee Presence, we can see everyone in the company and whether they are available, away at a meeting, on a call, or even out to lunch. Based on their status we can determine the best way to get in touch with them.”

Heads Up Display Saves Time

“HUD lets you see really quickly whether someone is on the phone and what type of call they’re on. You can send them a Chat message, transfer a call, leave them a voicemail, or shoot them an email directly from HUD,” said Hamburg. “I don’t have to remember anybody’s cell phone number. You can just click on the little picture of the cell phone and connect immediately; it’s simple and saves time. I also receive my voicemails via email or directly on my screen. It’s quick and easy, especially because I hate dialing in to the office to check my messages.”

More Than 900 Days Without a System Reboot

How about reliability? Hamburg said, “Our server once went more than 900 days without needing to be rebooted. After that long, frankly, we were kind of afraid to reboot it!” Several years after implementing a Fonality phone system, Hamburg remains pleased. “The Outlook integration, the Heads Up Display, they’re just a lot better than everything else I’ve seen,” he said. “HUD really adds a lot of efficiency to the communication in the office.”



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