

# Fixed technology costs and eliminating obsolete technology risks gives Welfare and Pension peace of mind

Established in 1953, Welfare and Pension Administration Service, Inc. provides companies with a total administration package for Health and Welfare, Dental, Vision, Defined Contribution, Defined Benefit, Vacation, Apprenticeship, Industry, and Legal Service Plans.

With 186 employees working in Seattle, Portland, Anchorage, and San Jose, Welfare and Pension administers more than 70 plans with total assets in excess of \$5 billion, which provide benefits to more than 150,000 participants.

## Legacy systems are a drain

“Our legacy system was no longer supported by the manufacturer, reliable spare parts were becoming more difficult to source, and it was becoming less reliable and more expensive to maintain,” said Gilbert Lynn, Vice President and Director of Operations. “Additionally, we were unable to grow or add new applications,” Lynn stated.

## Why VoIP?

“Part of our mission is to use state-of-the-art technology to accurately deliver information in the most efficient manner to meet the requirements of our customers. We felt that deploying VoIP across our enterprise was consistent with our mission,” said Lynn.

Plus, VoIP offered the firm a number of productivity enhancing applications to its business in three major ways:

1. Operators and call center agents can be distributed or centralized at any office or remote site, transparent to the caller, to ensure prompt answering.
2. Presence management displays the availability and status of employees throughout the enterprise so that customer requests can be quickly matched to the best available resource regardless of their physical location.
3. Improved customer service with the ability to manage voice and e-mail messages from Outlook, manage call handling from the desktop, collaboration, and find-me/follow-me mobility options.

## ShoreTel Systems provide the best solution

All Phase has been Welfare and Pension’s telecommunications partner since 2000. Lynn stated, “All Phase has been very responsive to our needs. They understand our business and how critical our telephone system is to serving our customers. Plus, they have kept us informed of new technology and services that could benefit our business.”

When they knew it was time to replace their legacy system, Welfare and Pension relied on All Phase to help them compare the ShoreTel System to products and services offered by Nortel, Cisco and Toshiba. ShoreTel tipped the decision-making scale because of it was easy: easy to install, easy to learn and use, easy to maintain, and easy to make changes. Plus, this service plan administrator was able to integrate the new ShoreTel system with their existing call accounting application.



## The challenge

Welfare and Pension wanted to keep cash reserves, while also avoiding the common problem of investing in obsolete-fast technology. Their legacy system had become unreliable and expensive. In addition, sourcing spare parts was difficult and the manufacturer had discontinued support.

## The solution

All Phase’s C-TAP equipment leasing and service program, which prevents lump sum technology purchases and assures fixed technology costs for several years. The program bundles the VoIP system, parts, labor and maintenance into a monthly payment package, and gives companies an opportunity to upgrade their technology during the term of the program to help avoid technology obsolescence.

## The benefits

For a fixed monthly fee, Welfare and Pension eliminated the two largest risks in technology investments: cash outlay and technology obsolescence. Plus, Welfare and Pension estimates they are saving \$25–\$30K per year by making the switch to the ShoreTel VoIP system.



For its headquarters, All Phase installed two ShoreGear 120/24 voice switches, two ShoreGear T1/PRI voice switches and 116 IP 230 phones. A ShoreTel System was also installed in the Oregon office, and there are plans to upgrade their systems in Alaska as well.



## Keep cash reserves and eliminate technology obsolescence

The All Phase Current Technology Assurance Program (C-TAP) helps companies eliminate the two biggest risks when purchasing technology: obsolescence and cash outlay. For tax purposes, C-TAP is considered an operating lease program that includes the VoIP system, a parts and labor service contract, unlimited training, software upgrades, technology refresh, and a buy-back program. The only thing not covered by C-TAP is cabling.

“C-TAP allows me to update my technology during the term of the program without increasing my monthly payment. For example, in year four, I could refresh 70 percent of my technology investment and extend my C-TAP agreement for the same monthly payment. What other program can fix technology costs five or six years into the future?” said Lynn. “It’s great; whenever I need work done I call All Phase and schedule it. I don’t have to worry about getting a bill every time we expand.”

## Making the switch

On a scale of 1 to 10 (with 10 being the highest), Lynn rated making the switch a 9.5. “We set up the new phones on our data network and had them running alongside the legacy phones until the new system was fully tested and the users were familiar with it. After hours, we simply had to move the outside lines to the new system to complete cutover. The ShoreTel cutover was a non event compared to the cutover of our legacy systems,” said Lynn.

## No more costly adds, moves and changes

With the ShoreTel System, changes take a fraction of the time it used to take, so costly adds, moves and changes are a thing of the past. For example, a new user with an extension and a mailbox can now be created in less than a minute. In the past, changes took a lot of time, and required an onsite technician—a costly expense.

## Productivity improvements

When asked if productivity had improved for their employees, Lynn stated, “Yes, and more importantly the service we offer our customers has improved. Presence management, Unified Messaging with Outlook® Integration, Multiple Call Handling Modes, Work Groups, Find-Me/Follow-Me, Caller ID with Screen Pops and the integration with our Call Accounting application have all helped increase our productivity.”

All Phase developed a sustainable and viable solution for Welfare and Pension. The combination of a ShoreTel VoIP System and the payment flexibility of All Phase’s C-TAP Program made making a system upgrade not only easy, but cost-effective for this dispersed benefit plans administrator.

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### Gilbert Lynn

Vice President and  
Director of Operations

### The savings

Welfare and Pension estimates it is saving between \$25–\$30K per year.

### The goals

- Reduce technology obsolescence risk
- Keep cash resources
- Reduce ongoing costs
- Improve customer service
- Seamless call integration with headquarters and satellite locations
- Presence management
- Decrease maintenance and manageability issues
- Monitor call and response time
- Prioritize and separate calls to any location dependency based on urgency
- Gain control of adds, moves and changes
- Consolidate systems

**Contact All Phase to learn more about VoIP for your company, 206-363-3100.**  
[www.allphasecom.com](http://www.allphasecom.com)