



#### ACCOUNTING SUCCESS STORY

## ShoreTel makes plenty of dollars and lots of sense for BDO Canada LLP

#### CHALLENGE:

- As its workforce becomes increasingly mobile, BDO needs a phone system that ensures all client calls reliably reach the company's accounting professionals wherever they are, seamlessly moving their offices whether they are working at home, at a client site, or on the road.

#### SOLUTION:

- A ShoreTel UC System, with more than 1,500 ShoreTel IP Phones throughout the company's 99 offices across Canada.

#### BENEFITS:

- ShoreTel Office Anywhere gives BDO's mobile workforce seamless access to all ShoreTel capabilities from anywhere and lets them see messages at a glance from their BlackBerries.
- With ShoreTel's high reliability and advanced call handling, important client calls always get through.
- ShoreTel delivers lower costs all around: capital equipment, implementation and training, user licenses, and post-implementation support.

With headquarters in Toronto, Ontario, BDO is one of Canada's largest accounting services and advisory firms. The company's 99 offices across Canada offer a wide range of financial services and strategies to a highly diverse clientele, which includes owner-managed businesses, large enterprises, mid-market public companies, community organizations, not-for-profit agencies, and professional firms.

Just as accountants no longer use slide rules and pocket calculators to update ledger books, the days of the black rotary phone and secretary phone notes belong to a bygone era for BDO's stellar team of more than 1,200 chartered accountant professionals. These professionals, located at more than 99 offices across Canada, specialize in a wide range of accounting and financial services, including such fields as forensic accounting and international financial reporting standards.

Despite BDO's 21st century stature and size, the firm takes pride in maintaining high levels of customer satisfaction with a personal touch, and partners understand the importance of serving global clients as attentively as if they were right next door. Unfortunately, BDO's aging phone system was falling increasingly behind in supporting this mission. In many cases, clients had to call a round robin

of phone numbers to reach partners. When the firm decided to move its national headquarters to a new location, it decided to standardize on the ShoreTel (UC) system to provide the necessary agility in a contemporary and dynamic business climate.

#### Timely Access Equals Timely Accounting

BDO revenue depends on consistent client service, part of which requires a phone system that is reliable and flexible. If a phone isn't working, or if professionals are inaccessible, they can't talk to clients. And if they can't talk to clients, they can't provide them with the wide range of billable services, advice and information in a timely manner. Plus, BDO professionals have to be reachable while they are working at client sites, for instance when performing audits, seven days a week during tax season. But despite its mission-critical role, the firm's



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patchwork of fragmented stand-alone phone systems made it difficult for clients and accountants to connect—particularly during this intense, deadline-driven period.

Without unified messaging, BDO’s professionals had to check voicemail constantly to avoid missing important calls. Calls couldn’t be forwarded to mobile phones or other offices, and mobile phones were sometimes out of range. And if professionals were working in another office, they had to navigate a different and completely separate phone system.

The firm decided that a voice over IP (VoIP) system would improve efficiency at every level by putting all communications on the same page, extending the internal phone system to mobile devices and different locations, and simplifying interoffice communications. Further, an up-to-the-minute phone system would open up opportunities for more efficient business processes. To achieve these goals, the company hired Claude Vezina, a 20-year telephone systems design and implementation veteran, to help select and deploy a new VoIP phone system across all offices.

### **ShoreTel Puts Everyone in the Black**

“The first step was to determine whether the company could accomplish its objectives with its legacy vendor,” Mr. Vezina said. “Once we established that the current vendor could not meet our needs, our local reseller, Smart IP, suggested that we take a look at ShoreTel. Right off, we liked what we saw. The initial demonstration showed the system could do exactly what we wanted, so we brought the ShoreTel equipment into the lab and gave it our own test drive. It worked perfectly.”

Testing showed that the ShoreTel UC system not only meets all of BDO’s current requirements, but also complements the firm’s long-term technology strategy. “We liked where ShoreTel is going with its mobility features and ease of integration,” Mr. Vezina explained. “ShoreTel also provided a proper unified messaging solution that provided full integration

with the desktop, such as directory access and email integration with Microsoft Outlook.”

ShoreTel’s process for issuing user licenses also suited the company’s dynamic assignments. “We always have a lot of employees transferring from one office to another,” Mr. Vezina explained. “With ShoreTel, we can use the same license and there’s no added cost to transfer it, and there’s a generous grace period for adding licenses. This all adds up to ease and convenience for the IT group.”

After a thorough financial analysis, BDO’s top-level executives concluded that ShoreTel offered the most cost-effective, feature-rich and reliable solution and decided to implement the ShoreTel system, with the initial deployment at the company’s national headquarters.

### **Implementation and Support are put to Good Account**

Before installation began, the firm conducted a network assessment to ensure the company’s infrastructure was voice over IP (VoIP) ready. This laid the groundwork so that upgrading LAN equipment became a standard step in subsequent ShoreTel implementations. ShoreTel partner, Smart IP, trained the five-member IT team, who support the entire system remotely, and a professional trainer instructed the firm’s users.

Since that first implementation in 2007, BDO has continued to roll out the ShoreTel UC system to its additional offices throughout Canada, adding users, ShoreTel IP 560g phones, and BlackBerry mobile devices. “ShoreTel lets us provide users with the same level of support and service in every office and even out of the office,” Mr. Vezina said. “Remote support of the offices that have implemented ShoreTel is simple thanks to the ShoreTel Director Web-based user interface. The IT support staff simply open up a browser and can make moves, adds and changes—even from home.”



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## Versatile Features Add Value

As a result of the ShoreTel deployment, the BDO IT team transformed the process for bringing new offices online. “Typically changing a phone system for a 150-person office takes a full weekend, working very long hours,” Mr. Vezina said. “With ShoreTel, I can do all the setup in advance, and it only takes 20 minutes to bring up the ShoreTel phone system at the new location.” Simplified management not only frees valuable IT resources for other core business projects, it also helps reduce “call out” costs for third-party contractors.

In addition to simplified system management across multiple sites, the ShoreTel UC system also delivers productivity-boosting features in its application suite, ShoreTel Call Manager. Every ShoreTel system user license includes ShoreTel Personal Call Manager as standard. ShoreTel Call Manager integrates with Microsoft Outlook—a timesaving feature that lets BDO employees view and maintain voicemail messages, and use Microsoft Outlook directories to quickly identify phone numbers and place calls with a single click.

ShoreTel Call Manager also includes Office Anywhere, which lets users reassign their extensions and work remotely from any device. For instance, BlackBerry users can see new messages at a glance, and listen to them via the attached WAV file. “The user application is designed to be very easy to use, which means the level of adoption throughout the company is very high,” Mr. Vezina said. “Features like Office Anywhere and Find Me let callers quickly connect to the right people, and four-digit dialing has streamlined communications between employees in different offices. Office Anywhere, for instance, makes it possible for our staff to function during off-site audits at client offices, just as if they were in their own offices. They can maintain their full productivity.”

BDO also uses ShoreTel Operator Call Manager to equip receptionists with easy-to-use call management functionality and detailed information that permits a high level of personal service. This information includes presence notification. “Callers

automatically receive faster service when the operator knows if the person they are trying to reach is on the line, out of the office, or has their phone transferred to another extension,” Mr. Vezina said. “Our smaller offices use ShoreTel Huntgroups to make sure callers talk to a live person. Now we never have to worry that an important client call is missed. Before ShoreTel, I often had to delay my departure for a business trip to be available for important calls. Now I can always be reached, and it’s very easy to sign into the ShoreTel system from any location.”

## Reliability the Company Can Count on

Reliability is also important in this high-touch environment. “We have had zero major failures since the first ShoreTel installation,” Mr. Vezina said. “After experiencing regular outages with our old system, our partners used to worry every time we made a change or added phones. ShoreTel has given us all peace of mind, and now professionals can focus on their clients.”

ShoreTel also helps BDO’s bottom line on the expense side of the balance sheet. “It costs about 25 percent less to install a ShoreTel UC system in a new office, compared with our previous vendor,” Mr. Vezina explained. “ShoreTel pricing means that we can plan for growth and organizational changes with confidence. In our experience, when you say it will cost ‘x’ dollars to install the ShoreTel system, that’s what it will be. Plus, you don’t need a lot of expensive post-implementation support and professional services. ShoreTel just works.”

In addition, ShoreTel significantly reduces toll call costs. “No matter where they are, staff can use Office Anywhere to place calls over the corporate network,” Mr. Vezina said. “We’ve already seen considerable savings.”



## All-round Savings add to a Better Balance Sheet

The ShoreTel system also trims down space usage an important benefit for high profile offices in expensive real estate locations. In one such BDO office, the ShoreTel system equipment freed an entire rack that had previously been needed for the old phone system.

ShoreTel also facilitated additional space savings by enabling BDO to expand its office hoteling program. Now, twenty people in one office share eight desks, optimizing office resources while reducing the company's carbon footprint and real estate costs. Plus, ShoreTel's flexibility allows the company to easily centralize receptionists, rather than staffing every office with a dedicated receptionist.

"Each office has different requirements based on its geography and client needs," Mr. Vezina said. "ShoreTel gives us the flexibility to address these different requirements and provide ubiquity of services and support—without having to be constantly moving around the country. ShoreTel has taken stress out of the phone system—every time a partner switches to ShoreTel, that partner calls me back in about a month to say that they love their new ShoreTel system."

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## About ShoreTel

ShoreTel is a provider of business communication solutions whose brilliantly simple unified communications platforms, applications and mobile UC solutions promise a new rhythm of workforce engagement and collaboration. With costly complexity eliminated by design from its award winning, all-in-one IP phone system, UC and contact center solution, and its industry leading hosted business phone system, workers enjoy a freedom and self-reliance that other providers can't match. Users have full control to engage and collaborate, no matter the time, place or device, for the lowest cost and demand on IT resources in the industry. ShoreTel is headquartered in Sunnyvale, California, and has regional offices and partners worldwide. For more information, visit [shoretel.com](http://shoretel.com) or [shoretelsky.com](http://shoretelsky.com)



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