

Becket & Lee Saves a Bundle with Microsoft UC

An interview with Veronica Morton, CIO

Becket & Lee, LLP is a private Law firm headquartered in Philadelphia. As a national leader in bankruptcy law, their 200 attorneys and business customers have high demands for communications. After a thorough search by their small IT team, Becket & Lee chose Microsoft Lync (now Skype for Business) as their Unified Communication and Collaboration solution. Veronica Morton, CIO, said "Moving to Lync was the best decision we ever made," and was kind enough to share her decision process and lessons learned from running Lync in her business.

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- Veronica Morton CIO
Becket and Lee

The Problem:

The main business driver for the switch to a new communications system was to replace an aging Avaya PBX. The costs to manage the old PBX were getting exorbitant. A second challenge was the limited functionality of their call center, which made changes to call flows difficult. Becket and Lee has many special requirements as a bankruptcy specialist such as recording **all** calls into the contact center. So for these reasons they began looking for a PBX replacement.

In addition, Becket & Lee was paying a lot for faxing. Using individual fax machines around their offices was inefficient. Being an Exchange/Outlook email shop, Veronica knew she could improve the productivity of the attorneys with a unified inbox.

The Search:

Becket & Lee's first step was to research what they knew: Avaya and Cisco. They assessed both systems to see if there was an easy fit and a sensible path to replace what they already had. After reviewing both, they felt better functionality must exist elsewhere. Concerns about purchasing a proprietary and inflexible system, especially since these solutions were cost prohibitive for their sized firm.

Since there were so many elements of their communications systems to upgrade, Veronica's team started to look at other solutions such as Microsoft Lync. She found that Microsoft's software based approach was much more flexible and easy to integrate. Microsoft recommended she speak with Enabling Technologies, an award-winning Unified Communications and Collaboration partner, about their new UC initiative.

The Process:

Enabling Technologies worked with Beckett and Lee on developing a UC roadmap to accommodate all of their special requirements:

1. Replace the PBX with Microsoft Lync for Enterprise Voice, and add IM, audio/video/web conferencing, and desktop collaboration capabilities
2. Replace outdated Avaya voicemail with Exchange Unified Messaging for a single unified inbox
3. Integrate faxing into end users' Outlook inbox with Sagem Xmedius boardless fax server
4. Determine and implement Prairie Fyre now Mitel's MiContact Center solution
5. Implement a call recording system using Audiocodes SmartTap
6. Determine which endpoints will replace the old phones

The Preparation of the Organization:

The Facilities department had been managing the PBX, so a move to software and server technology necessitated a change to which department would manage the new system. As is common these days, the new system would fall under Veronica's realm – IT. "I didn't want to be in the Telecommunications business" said Veronica, "and I certainly did not want to move back to a PBX. We wouldn't have the flexibility that we have now with Lync."

Veronica was hyper-focused on the user experience, and listened to her constituents throughout the decision making phase and during, design, implementation, and rollout phases.

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Keys to Success and Lessons learned:

To lay the groundwork for a smooth rollout, IT department prepared the firm that the old phones were going away. Internal marketing alerted the users that "It's coming!" and got users excited about the change. Veronica said that having one of the firm's Partners be the project's internal "champion" proved invaluable. The partner advocated for the change and helped push the project through when the other partners might have given up on the new technology.

Another key to Becket & Lee's success was allowing time for a six-month pilot period to get the systems tuned up before a full cutover. This was a wise move because there were a few wrinkles such as dropped calls in Lync meetings due to the inbound voice trunks, finding the correct contact center solution that would record calls, finding the right phones for users with hearing/medical issues, and tweaking the faxing integration. When asked what she would do differently, Veronica's main advice is to spend more time with the SIP Trunking providers, and to recognize that it takes more time than expected to port over DID numbers.

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The ROI:

In terms of ROI on the Lync implementation, Becket & Lee realized many areas of savings.

1. Savings on the old PBX Maintenance
2. Savings of replacing all of the old phones with headsets
3. Reduction of WebEx costs for virtual web meetings
4. Savings on Long Distance
5. Maintenance and service of fax machines

The Productivity Improvements:

Lync offered many new features to the firm, in addition to enterprise voice. There has been a major increase in Instant Messaging, and a decrease in emails between the attorneys. The quicker response has made the firm more customer focused.

The firm’s administrative assistants love how they can see if someone is available from their phone or PC, so as to make an intelligent decision on whether to transfer the call directly (if the person is “available”), send an IM (if the person is “busy”), or take a message (if the person is “in a call”).

The Bottom Line:

From experience, Veronica has learned that no implementation of new technology is simple. But she found that with Enabling Technologies, Becket & Lee had an expert resource to help guide the way. “Enabling’s Project Managers are very good and helped us to go through from the beginning and showed us what it’s going to take to put in this new system.” What’s next for the firm? **“We are ready to go to Lync 2013 and I wouldn’t consider doing it without Enabling”**