

Case Study:

Brown Advisory selects General Communications and ShoreTel to build on its commitment to providing customers with first-class performance and the highest level of service.

Brown Advisory

Client
Brown Advisory

Challenge
Find a technology partner to design a communications system that could accommodate the firm for current and future expansion, centrally manage all sites to free up IT resources, and integrate sales force and mobile applications.

Solution
A multi-site networked ShoreTel® Unified Communications system customized by General Communications.

Results

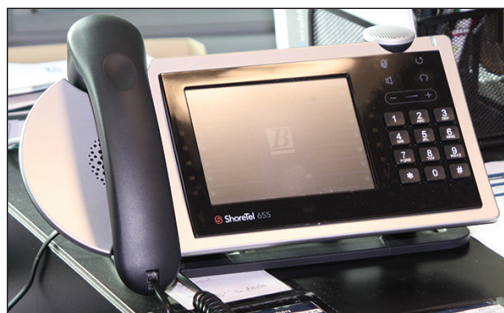
- Maintenance and updates are performed at one central location.
- The ShoreTel system integrates with their client systems, so financial advisors can see pertinent data.
- Calls can be forwarded easily from desk to cell phones.
- GCC is a trusted partner of Brown Advisory.
- "You know a project has been done well when you don't hear anything about it after completion and you can move on to another project with peace of mind."
Tiffany Ernest

Brown Advisory is one of the country's leading investment firms. They provide their clients with investment and strategic advice, along with the highest level of individualized attention. Secure and reliable communications are paramount to their business.

Headquartered in Baltimore and Washington, D.C., the company also has regional offices in Boston, MA, New York, NY, Wilmington, DE, Chapel Hill, NC, and London, England.

"The firm has grown substantially in the last four years — we now have more than 400 employees and we are continuing to grow our client base in the United States and throughout the world. Our old phone system didn't meet our needs and didn't allow us to scale affordably," said Tiffany Ernest, technical infrastructure manager.

"Our existing Avaya phone system did not integrate desktop and mobile phones. Maintenance and updates had to be performed at each location, which



Tiffany Ernest, Brown Advisory's technical infrastructure manager, thanks Paul Denaro, president GCC, for a job well done.

was costly in terms of IT resources. The system did not have the advanced features our team needed," she explained.

"We started to research new phone systems. We looked at Avaya, Cisco®, and ShoreTel®. Our key requirements included sales force integration, central management, and a partner who could actually help us determine what we needed."

"We met General Communications through a referral. We were immediately impressed with their knowledge and follow-through. We felt comfortable that General Communications had a

dedicated project management team to install the system, train our team, and provide ongoing support.”

“They learned about our company and the way we do business and consulted with us on how the advanced features of ShoreTel could make our lives easier, more productive, and increase client satisfaction.”

“We wanted proof of concept — we were planning to install this system in all of our offices. So GCC went above and beyond — they installed a ShoreTel server with Mobility in our Baltimore headquarters and a networked ShoreTel system in our Chapel Hill location.”

“We were able to test it; we had a few questions that were resolved, and we determined that, yes, this was the right system for our company.”

“We had weekly project management meetings to ensure that tasks were accomplished and completed to our satisfaction. GCC kept us updated throughout the entire process.”



Brittany Denaro, GCC customer support and training manager (c), trained the Brown Advisory team so they could take full advantage of the new ShoreTel system.

“We were certain that the ShoreTel system proposed by GCC would adapt to all our needs and we knew GCC was the right partner. So we closed the sale, ordered the equipment, and started the installation process on an office-by-office basis.”

“We insisted that everyone get trained before they received their new phones,” Ernest explained. “We wanted to make sure that everyone felt comfortable

with the system and that they could benefit from all of its new features. Brittany Denaro, GCC customer support and training manager, held multiple training sessions at the regional offices. Training was customized for the differing needs of the employees. Brittany is an excellent trainer. Our team learned how much more they could do with their new phones.”

Phones were set-up in advance. The cut-over was done on Friday, after the staff left. Phone replacement and testing occurred on Saturday, and any final tasks were done on Sunday.

“Security was critical to the entire installation process and members of our IT team worked with GCC during every step of the process. GCC was very understanding about our internal regulations, and we worked very well together,” Ernest said.

“We were immediately impressed with General Communications’ knowledge and follow-through. They listened and understood our requirements. The installation went seamlessly.”

“When employees returned on Monday, the new system was in place. The transfer was seamless in each of the offices.”

Now, there is a single point of administration. Maintenance and updates are performed at one location — streamlining operations and saving countless hours of IT time.

When people travel from one office to another, they can easily log in to get messages and phone calls. Calls can also be transferred from desk to cell phones.

The ShoreTel system also integrates with Brown Advisory’s client systems, so when a client calls, financial and strategic advisors have immediate access to pertinent data.

“Going forward, all the daily admin can be performed by our in-house team,” said Ernest. “We’ll rely on GCC when we want to add new features to the system. We are very pleased with ShoreTel and consider GCC a trusted partner.”



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