

Richardson Partners Financial

Leading Canadian Wealth Management Company Focuses on Customer Responsiveness

CallCenterRecord provides Richardson Partners Financial a simple and flexible call recording solution.

As one of Canada's fastest growing independent wealth management firms, Richardson Partners Financial is setting new benchmarks for its ability to connect investors with industry-leading investment advisors, time-tested processes and exclusive wealth management solutions.

Upgrading to a Cisco IP Communications solution and deploying Cistera's Enterprise Applications Platform has ensured that the company continues to help advisors deliver this new level of service to its clients.

Richardson Partners Financial deployed Cisco's CallManager and incorporated the Cistera ConvergenceServer and the CallCenterRecord and QuickRecord application engines. Four separate corporate offices are managed from the Mississauga, Ontario technology centre. Not only has administration been consolidated, but communications and client services have been enhanced. All recorded calls are archived, making retrievals simple, fast and efficient. Key employees have the ability to record complete calls on an as-needed basis, at any time until the termination of the call.

The Unified Administration capabilities offered by the Cistera ConvergenceServer platform were key to the decision to adopt the Cistera solution. The unique platform allows for a single IT administrator to oversee the system from corporate headquarters.

"The Cistera Platform is easy to manage. Unified Administration has reduced our administration costs, and the features and functionality of the applications have improved our customer service." says Stan Eng, CTO Richardson Partners Financial

CHANGING THE WAY YOU THINK ABOUT ENTERPRISE COMMUNICATIONS

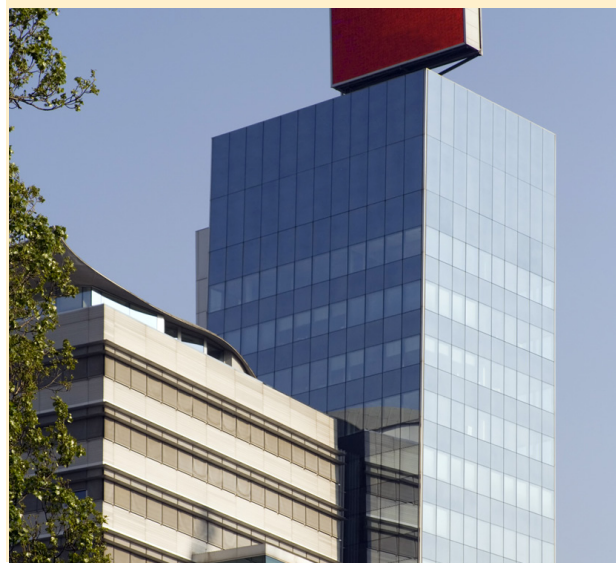
Customer Profile: Richardson Partners Financial Limited is one of Canada's fastest growing independent wealth management firms. With offices in eight major centers, Richardson Partners Financial has gained recognition and trust from investors for its ability to deliver comprehensive advice and exclusive wealth management solutions. www.rpfl.com

Business Situation: Richardson Partners Financial maintains internal call centers for its advisors, and wanted a solution that provided a quick and accurate way to record and retrieve calls to meet its customer service and training needs.

Solution: The Cistera ConvergenceServer, as part of a Cisco IP Communications deployment, allowed the company to centrally manage its IPT infrastructure from corporate headquarters. CallCenterRecord™ enhanced record-keeping by providing records of all calls to its internal call centers. QuickRecord added the ability to record calls "on the fly."

Benefits:

- Improved customer communications supported by archives of advisor calls.
- centralized management of the corporate IPT deployment from company headquarters streamlined operations.



“An important consideration is that we have no remote IT staff. Therefore we needed a solution that could be managed as a single environment and work seamlessly with Cisco’s CallManager. This solution worked perfectly for us and streamlined our IT operations—from our headquarters we manage three remote locations.”

Andrew McKinney, Director of Technical Services.

Because the Cistera ConvergenceServer is a distributed platform, where the integration with the PBX, the administration of users, the security and the archiving are all centralized, it dramatically reduces not only the implementation time and cost, but also the total cost of ownership of the IP Applications platform.

QuickRecord provides call recording with a push of a button. Users can choose to record any call, in its entirety, no matter when they decide to capture the call.

CallCenterRecord provides high quality, continuous call recording capabilities that help you meet regulatory requirements and improve quality control. With digitized recordings, you will be able to transport recorded calls in your network as you see fit — attach them to a problem ticket, analyze them for customer service; and minimize potential liability to your organization. With CallCenterRecord Enhanced, utilize advanced features geared toward supervisory management requirements.

Advanced, reliable call recording is a reality with Cistera’s CallCenterRecord, a robust IP telephony voice recorder and media management service that delivers high quality continuous call recording capabilities that can be combined with advanced supervisor management features. As an application engine running on the Cistera ConvergenceServer, CallCenterRecord draws upon the power and security of the tools native to the Cistera ConvergenceServer.

Cistera’s Quality Assurance and Management Solutions offer a range of solutions—from one-button, on-demand recording to enterprise call center solutions that include easily configurable supervisor playback tools

Cistera Networks is a leading provider of enterprise communications platforms and services. The company blends powerful application infrastructure with industry-specific business processes, to deliver the benefits of voice, video and data convergence to the user. Cistera’s industry-leading platform delivers the most reliable, scalable and secure application services for IP-based network environments. Its broad portfolio of application services enables users to improve customer service and satisfaction, increase productivity and collaboration, improve responsiveness to critical incidents and to provide a safer environment.

Based on open standards and a proven server technology foundation, the award-winning Cistera ConvergenceServer has a single unified administration which delivers the lowest total cost of ownership in the industry. It enables customers to create robust and scalable environments that are flexible enough to adapt to their changing needs by scaling up to support from fewer than one hundred to thousands of users, and scaling out to support multiple sites, making it ideal for a broad range of organizations.

6509 Windcrest Drive, Suite 160
Plano, TX 75024
Phone: 972.381.4699
Toll Free: 1.866.965.8646 Facsimile:
972.381.4635
<http://www.cistera.com>

Sales Support Contacts
Sales Support Number 1.866.722.2660
Email: SalesSupport@cistera.com

