

**New York State Civil Legal Services
Technology Conference**

Executive Director Panel Discussion Session:

Using VoIP Phone System Capacity to Improve Phone Intake

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1. **NLS identified a need to improve efficiency of the telephone component of our intake process.**

Intake problems included:

- A. Long wait times, people on hold without any information while waiting.
- B. No messaging ability while clients are in the queue.
- C. No ability to redirect callers in the queue who called the wrong agency
- D. No ability to see how many people are in the queue and what issues they are calling about.
- E. Many callers waited on line to get through and then were told that we do not cover their legal problem in our priorities.

2. **Voice Over Internet Protocol (VoIP) System Capacity** (Presently in development)

- A. System can advise people their queue number and wait time.
- B. Callers can receive information while waiting on the queue.
- C. Priority and referral information can be provided while waiting.
- D. System monitor shows the numbers of people in the queue and which NLS staff are presently on a call throughout the three offices.
- E. In the future we will be able to distribute calls throughout the three offices as needed to reduce the wait time for callers in the queue.
- F. We can identify English and Spanish callers and message to them in the appropriate language. We will also be able to identify non-English and non-Spanish speakers and arrange interpretation sooner.

3. **Acquisition Process: Purchase or Lease?**

- A. Received recommendation for a VoIP vendor from our IT company
- B. Sought vendor quotes
- C. Went with new phone vendor (recommended by IT vendor)
- D. Decided to lease based on up front cost differential versus owning the equipment.

- E. We pay a flat per phone monthly cost. They provided all of the equipment at no cost and provide all upgrades w/o cost to NLS.
- F. Signed three year contract with three year option at the same rate.
- G. Vendor programs VoIP system based on our requirements
- F. We pay \$2013.83 per month (\$24.2k/yr) for the leased Polycom phone services and support and an additional \$674.97 per month for Time Warner Business Class Broadband access with 35MB x 5MB service in the three offices.
- G. We can use VoIP system for conference calls and eliminate our conference call "bridge" service provider costs.

4. **Implementation:**

- A. Management staff worked with the vendor implementation staff to develop scripts for initial messaging requirements.
- B. We mapped the phone system and developed new extension numbers to create three digit extension dialing between the three offices.
- C. We met with the trainer and developed a schedule for staff training.
- D. We organized our long distance lines, fax and language line phone lines to ensure that they were all operable with the new system.
- E. We scheduled the implementation of the new phone system on separate days for each office.
- F. We worked closely with their implementation team for the next month to identify issues and iron out the kinks, most of which were taken care of in the first week to ten days.

5. **Staff Training:**

- A. Staff were trained in their work groups several days before the implementation.
- B. The trainer used a live phone link and demonstrated the features. Staff each were given the opportunity to use the phone.
- C. Thereafter staff were able to call on the tech support person for questions or issues.
- D. On the date of implementing the VoIP the new phones were plugged into the wall data jacks and the desktop computers were plugged into the phone for internet access.

6. **Future Plan and Potential:** (Presently in development phase)

- A. Draft, record and program the individual messages at each selection choice on the phone tree. (referrals, community resources, NLS priorities, etc.)
- B. Add messaging in local refugee communities' languages.
- C. Consider distributed telephone intake which would allocate intake calls around the region regardless the county of residence of the caller.

- D. Target certain kinds of issues for impact screening through messaging.
- E. Keep data on volume of calls turned away, referrals, wait times, daily, weekly and seasonal call volume metrics.
- E. Periodically monitor call quality, response times and queue management.
- F. Set up voice mail box for client/caller feedback on service quality.
- G. Provides foundation for creating a separate intake unit or allowing the intake function to be made more elastic based on the demands on any given day.