

Chartered Accountants Australia and New Zealand

Chartered Accountants Australia and New Zealand – CASE STUDY

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INDUSTRY

Financial Services

HQ

Sydney, Australia

YEAR FOUNDED

2014

EMPLOYEES

380



CHARTERED ACCOUNTANTS
AUSTRALIA + NEW ZEALAND

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Richard Wiltshire

General Manager Technology, Chartered Accountants Australia and New Zealand

APPROXIMATELY \$70,000 ANNUAL COST SAVING ON
TELECOMMUNICATIONS SPEND

ENABLING PERMANENT 3-2-1 HYBRID WORKING POLICY

Chartered Accountants Australia and New Zealand (CA ANZ) represents more than 128,000 financial professionals, supporting them to make a difference to the businesses, organisations and communities in which they work and live. CA ANZ focuses on the education and lifelong learning of members, and engages in advocacy and thought leadership in areas of public interest that impact the economy and domestic and international markets.

Formed as a result of a merger of the Institute of Chartered Accountants Australia and the New Zealand Institute of Chartered Accountants, CA ANZ has undergone considerable international expansion with offices now also in Hong Kong, Singapore, Malaysia and the UK. This is providing CA ANZ's members with international support, connecting with key business communities, like-minded professional associations and investment bodies globally.

'As-a-service' vision



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In 2017, CA ANZ began a technology transformation program based on the concept of an 'as-a-service' technology platform. The vision was to reduce the organisation's reliance on operating on-premise infrastructure and to reposition the office networks as essentially 'internet cafés', explains Richard Wiltshire, CA ANZ's General Manager Technology.

"For our staff and our members coming into our offices, they'll jump on a network and consume all of their resources and services out in the cloud. We wanted to move away from on-premise technology because we don't see the value in running our own infrastructure anymore. This also frees up our team from the time-consuming process of patching servers or performing updates, allowing them to focus on more valuable work."

Functionality was the key driver for change for CA ANZ's communications and contact centre technology, as the separate platforms were no longer meeting the organisation's requirements.

CA ANZ was also dealing with a legacy networking and communications environment in each of its locations; including a large hardware footprint and different contracts with individual telco providers.

"We had separate telco bills at different calling rates at each location, along with approximately 45 pieces of physical hardware building out what was effectively our phone system – each one of those pieces was complex and prone to failure. As the technology was aged, it was even difficult to find the right people that could support the platform," said Wiltshire.

Comprehensive evaluation of the market and available technologies

Before committing to a new unified communications and contact centre solution, CA ANZ undertook an extensive review and evaluation process.

"It took us quite a while to explore the market, because there are a lot of different technologies out there – both traditional phone systems and the newer UCaaS solutions," said Wiltshire.

CA ANZ selected a global unified communications platform for all its operating countries and staff, comprising RingCentral MVP and RingCentral Contact Centre, natively integrating video and phone, and upgrading its contact centre capability all within the same platform. The solution is providing fully-featured video and audio conferencing, contact centre, analytics and reporting, together with application integration with CA ANZ's Microsoft Teams and Salesforce platforms.

All internal calls now made between offices are made on CA ANZ's own network, rather than being international or interstate calls.

Enhanced contact centre capabilities

"One of the most immediate benefits for us has been the ability to change our IVR workflows at short notice and quite simply without any coding," said Wiltshire. CA



ANZ has a two-week shutdown over Christmas, which in the past required a project to kick off around September to change its IVR workflows and messages.

The RingCentral platform has also been effective in helping CA ANZ manage its annual subscription renewal period at the end of each financial year.

“These periods are an incredibly busy time for us and our members. Working with the RingCentral team and the technology, we’ve been able to ramp up that contact centre capability in rapid fashion for renewals. We also now have insight into phone and IVR data to find out what our members have been calling us about, so we can tailor our messages and set their expectations according to the different queues.”

There is now far greater consistency between contact centre and non-contact centre staff, with integration of CA ANZ’s video platform and warm transfers of calls out of the contact centre. CA ANZ also has automatic compliance with Payment Card Industry Data Security Standard (PCI DSS) using RingCentral’s fully certified platform, providing screen pop information to capture credit card payment information securely, integrated with CA ANZ’s Salesforce CRM platform. Deeper integration with Salesforce is planned, to further enhance the unique personalised and high touch experience for members when they call into the CA ANZ contact centre.

Supporting a hybrid working environment

Before deploying RingCentral, CA ANZ had initially moved to a work from home environment using Microsoft Teams, Skype and Zoom, which had its limitations. Now, CA ANZ’s staff can effectively service members from anywhere, explained Wiltshire.

“We actually deployed the entire RingCentral platform during COVID lockdown. Now it’s literally a case of picking up a laptop, plugging in a set of earphones and you’ve got all the resources that you need anywhere in the world to be able to service our members, no matter your role.”

“In the past we struggled to have team briefings across departments let alone the entire organisation, prior to having the RingCentral platform in place.”

The deployment of RingCentral Cloud PBX for Microsoft Teams has been “an absolute game changer” for CA ANZ, says Wiltshire. “It just provides a seamless experience between RingCentral and Team’s collaboration, which we otherwise could not get in an organisation structured like ours. Now that RingCentral is integrated into Teams, our users don’t have to use a separate app to make a call, and it’s a really strong, reliable contact form for voice.”

In mid-2021, CA ANZ implemented a permanent hybrid working ‘3-2-1’ policy: three days working from home, two days in the office, with one of those days, the entire team in the office. “Technology is the enabler to give our organisation the flexibility to even consider something like that,” said Wiltshire.

Creating value for members



Overall, with RingCentral CA ANZ has experienced significant improvements in efficiency, particularly the savings made on both the organisation's annual telco and maintenance spend, and in being able to redeploy internal resources to more strategic projects. Ultimately, rather than just supporting technology, this has resulted in membership fees contributing directly to creating value for CA ANZ's 120,000 members.

"We've increased our engagement across our members using RingCentral's collaboration platform and made a real difference to the membership community as a result," said Wiltshire.

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