



# Microsoft Teams UCaaS + CCaaS

## Customer Case Study

Customer:  **WESTFIELD BANK**

**CallTower and Five9 Deliver Microsoft Teams Data-Driven XCaaS Solution to Westfield Bank // Case Study**

The combined power of CallTower's native Microsoft Teams Direct Routing solution and Five9 Cloud Contact Center brings Westfield Bank new communication prowess



**Cori Holmes**  
AVP, CRC  
*Westfield Bank*



**William Rubio**  
Chief Revenue Officer  
*CallTower*

# About Westfield Bank

Established in 2001 and headquartered in Westfield Center, Ohio, Westfield Bank currently serves customers in Cuyahoga, Richland, Medina, Stark, Summit, and Wayne counties as well as insurance agencies across the country. We deliver financial roadmaps and solutions so families, businesses, and insurance agencies can thrive.

-  Established in 2001
-  Headquartered in Westfield Center, Ohio
-  Top Workplaces 2020
-  NorthCoast 99 award

In 2020, Westfield Bank was awarded both a Top Workplaces 2020 award from The Plain Dealer and a NorthCoast 99 award for top talent in Northeast Ohio from Cleveland Magazine.

## The Challenge

Communication in a modern workplace setting is crucial for continued business success, but also for the health and safety of the people within the organization. Most organizations work tirelessly to ensure their employees and the public they interact with can expect a reasonable sense of security when conducting business.

Westfield Bank, as a financial and community institution, is among these responsible organizations. When they encountered a 911 call that was mistakenly routed to the wrong bank branch location due to the decentralized nature of their float tellers, they knew it was critical to make a change to address the issue.

With the backing of the executive leadership of Westfield Bank, AVP/CRC Team Leader Cori Holmes took the reins of the communication solution change.



“[The situation] brought about the option for us to make a change, and I think it was definitely necessary,” she recounted. She also had other goals in mind when hunting down a new communication solution. “One of the other big things we have continued to want to evolve and enhance here at Westfield Bank, is our data and knowing what that data means,”

**Cori Holmes** AVP, CRC  
**Westfield Bank**

In an organizational structure like a contact center at a bank, data-driven decision-making can be crucial to their public image, ROI and overall growth. With these two major goals and other strategic objectives in mind, Cori set out to find a new service for Westfield Bank’s contact center and calling needs.

## The Solution



[Watch the Video Case Study](#)

Cori Holmes from Westfield Bank was looking for a way to complete her objectives and arrived at CallTower for a Microsoft Teams UCaaS solution and with Five9 for their Cloud Contact Center CCaaS solution. The combination of these into a true blue XCaaS (Experience Communication as a Service) solution was natural: Five9 and CallTower have already been partners for more than four years. Together, they have managed the implementation and collaboration of many new customers – Five9 even named CallTower their U.S. Reseller Partner of the Year in 2020.



CallTower and Five9 came together to deliver a demo to Cori and the team at Westfield Bank. *“When I first saw a demo of Five9, I didn’t even know what to say,” she explained, excited. “Everything I saw was exactly what I wanted for so long in this role, but I’ve never been able to tangibly see or touch. When the data was coming out and it was real-time data, there are changes I can make within the system and things happen instantaneously. I can see if I’m hitting my SLA goals. I think the look and feel are super helpful for me, just to be able to see those things real-time and to have them in front of me.”*

Along with vastly improved data management, Cori was impressed with the personalized reporting features from Five9’s Cloud Contact Center system. *“We’ve had reports and I’ve done a lot of manual reporting using data from other systems,” she stated. “You can go in there, personalize and make a report out of the required information. I receive most of those reports to my email directly, with all the information I’m looking for. That makes my job more efficient as I’m working across different departments.”*

Meanwhile, CallTower’s native Microsoft Teams Direct Routing solution was reviewed by Westfield Bank to ensure the 911 issue would not be repeated. CallTower was the first solution provider to deliver a native Microsoft Teams experience with global calling plans, empowered by a 24/7/365 client services team and ensuring a personalized implementation, adoption, training and support strategy.



As a Microsoft Solutions Partner, CallTower’s monitoring and management services provide the highest quality user experience. CallTower delivers key Microsoft Teams UCaaS features and functionality which are unavailable through other providers.



*“CallTower provides a Direct Routing solution that reduces overall costs while enabling key feature sets and customized integrations. Our customers experience Direct Routing can leverage E911 capabilities, like Westfield Bank, and many other key integrations, all with easy provisioning through our CallTower Connect portal.”*

**William Rubio** Chief Revenue Officer  
**CallTower**

# The Results

Cori was committed to making sure the transition to their new XCaaS solution would be seamless. She spent time at each one of the branches, making sure everyone had their logins and passwords already set. She sat with them and made sure that they knew how to access the system – so on the morning of the transition, everyone had already been into the system at least one time. *“I think doing the pre-work on our end to make sure our employees were prepared for the change made the situation easier for those involved,”* she later said.



*“The day we went live was a couple days after the Martin Luther King bank holiday. We had the bridge line set up - I wanted to make sure that if we needed to flip back to the old system, we’d be fully prepared. I’m telling you, we turned on Five9 that morning and we didn’t have to have a single person call into the bridge line for a situation or an issue. Even [considering] our implementation help, those representatives were so surprised.”*

Cori Holmes AVP, CRC  
**Westfield Bank**

From the success of the service launch, it was clear that the combined solution was the communication service Westfield Bank had been searching for.

As with all technology changes, Westfield Bank did face adoption challenges. For example, Westfield Bank’s full-time contact center employees use headsets, while their universal banker counterparts use desk phones as they are customer-facing and do not wear headsets. Since both parties assist in the contact center operations of Westfield Bank, they both need access to the Five9 Cloud Contact Center system and the clashing hardware systems created connectivity challenges. However, with such a strong relationship between all three parties, resolutions were discovered and enacted to avoid further issues.

“I’m always looking for enhancements and ways to make things better,” Cori wrapped up. “Sometimes I’ll tell my employees I’ve made a change and it takes a day or two to get used to it. But soon they understand the efficiency and they’re more than happy to use it. If there’s a resolution and there’s a way, we can collaborate to find the solution, that’s what I’m going to do. It makes it better for the employees – which makes it better for our customers.”

## About CallTower

**Experience seamless, intelligent communication with CallTower, your trusted cloud communications provider.**

We specialize in Unified Communications as a Service (**UCaaS**), Collaboration as well as Contact Center as a Service (**CCaaS**), Conversational AI (**CAI**) technologies, with end-to-end professional and managed services. Our expertise and commitment to exceptional Customer Experience (**CX**) empower businesses to connect, collaborate, and grow with ease.

From streamlining workflows and optimizing IT infrastructure to proactive management and strategic guidance, our innovative and scalable solutions are designed to meet your unique business needs. **Redefine the way your organization communicates with CallTower—where innovation and expertise unite to drive meaningful connections and lasting success.**

**Let's Connect**