



CounterPath
an Alianza Company

Case Study

Custom Bria Softphones Streamline Call Center Operations

cleverbridge



AT A GLANCE

Situation

- Subscription commerce solutions provider for digital goods, online services and SaaS
- Customer Service team is integral to business and accounts for 25% of employees
- Multiple offices in Germany, Japan, Taiwan and the USA

Challenges

- Keeping up with changing customer expectations for enhanced contact experiences
- Ensuring the Customer Service team does not silo corporate communications within one application
- Making sure employees training on the new softphone client was fast and smooth, so the transition would not impact business processes
- Integration with a highly customized Asterisk platform

Introduction

cleverbridge is subscription commerce solutions company with 300+ employees in offices around the world. A **long-standing customer**, cleverbridge has been using CounterPath softphones since 2005 and steadily increased their deployment as the company grew. Used throughout the company, specifically with their customer service team, which accounts for 20-25% of the organization, these softphones were fundamental to cleverbridge's business in providing SaaS ecommerce solutions.

Over the years, cleverbridge had the opportunity to evaluate other softphone applications, including open source solutions from Jisti and 3CX, but continued to stay with CounterPath due to unparalleled quality and ease of use of the eyeBeam clients.

"We're a technology company, so we are always looking for those types of synergies and using technologies to our advantage," said Marc Javanshad, Applications Manager, cleverbridge. "No matter what stage of the game; 2009, 2012, 2015, it was always just a very easy answer that CounterPath solutions were the best out there no matter who we benchmarked them against."

In 2019, cleverbridge upgraded to a custom branded Bria solution to keep pace with changing customer requirements and the need to streamline operations. With the new solution, their agents would have access to an updated, more modern user interface and a greater set of tools for handling calls and call center operations.

Challenges

As part of their ongoing validation process and to ensure they are always using the best in class technologies, cleverbridge compared the CounterPath solution to many open source solutions and found a number of key challenges. Feedback from users found that open source platforms generally offered a poor user interface, and a less efficient way of doing basic tasks and handling of calls. As their existing eyeBeam softphones had become integral to daily business for cleverbridge, the transition to a new solution

needed to be seamless and
not disrupt call center
operations.

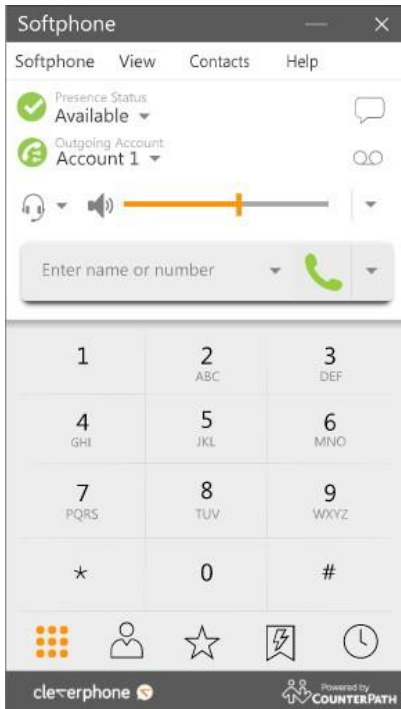


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processes



Solution Components

- CounterPath Bria® softphone -customized and white labelled
- Customized Asterisk PBX with third party integrations to key applications/systems

The Impact

- Superior user experience and audio quality for Customer Service agents
- Faster and more effective handling of calls, transferring, recording
- Easily and seamlessly adopted by customer service team
- Upgraded from legacy software with zero impact to business

In order to **facilitate an optimal transition** from eyeBeam to their new custom solution cleverbridge initially gathered feedback from key stakeholders to ensure internal buy-in, and identify where critical training points were necessary.

Then, workflows were created to train current employees in small groups, so questions could be asked and answered in real-time, as well as training for new employees as they are onboarded. While cleverbridge knew there would be a learning curve with their new softphone solution, by proactively planning their migration with CounterPath they were able to facilitate an easy transition for employees and ensure customer service was not interrupted in any of their call centers.

The Solution

After evaluating cleverbridge's need for a voice only softphone, CounterPath developed a custom Bria desktop application – branded "cleverphone" – to meet the organization's requirements and compliance needs. The customizations allowed cleverbridge to **select the features that are most valuable for their business** processes and goals and the ability to disable certain features to create a more **streamlined interface and increase support agent productivity**. Additionally, cleverbridge gained access to new features and functionality within the Bria base application, such as a more robust Call History tab, with the ability to search and sort calls by date periods and access call recordings, and Call Transfer that automatically places a call on hold prior to transferring and many other

improvements that make agents' lives easier.

The cleverphone application enables customer service agents to answer incoming calls in a round-robin format determined by their Asterisk PBX. Agents are able to transfer calls to other agents, manually record calls if necessary, and set their status to "Do Not Disturb" when they go on break. All of these features matched their previous experience with eyeBeam, and with proactive agent training, **only a small learning curve in the switch from eyeBeam to Bria.**

"For a call center environment, this is a tool they have to look at all day long, every day; and while we were reviewing other potential solutions, the feedback from our test users was that they generally offered a poor user interface, and a less efficient way of doing basic tasks and handling of calls, while also feeling sterile, complicated, and not user-friendly," said Javanshad. "What we liked about Bria, and eventually cleverphone, is the design of the user interface and readability of live call dialog – call timer, caller ID, transfer call options – which help streamline call center operations and make it a pleasure to work with. Plus, as the majority of functionality was the same between our eyeBeam and cleverphone clients, our agents were able to easily make the switch."

CounterPath provided **dedicated training and engineering resources** to support cleverbridge during the transition period. Working with CounterPath, cleverbridge was able to optimize their new customized client against pilot-phase feedback, and ensure everything was ready for deployment.



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Top Benefits

- Vastly improved both agent and customer experiences by enhancing how agents communicate and streamlining their day-to-day tasks
- Provided a single communication tool for customer service business processes
- Customization and branding process removed unnecessary features and functions from the User Interface, reducing distractions
- Able to adhere to PCI compliance and other regulatory standards
- Easily rolled out across global offices

Interested?

For more information, contact your CounterPath Sales Representative or email sales@counterpath.com

The Results

With the CounterPath solution, cleverbridge was able to deploy a custom branded and full-featured calling client that enhanced its ability to **deliver exceptional customer service, while streamlining operations**. Call agents can now focus solely on the task at hand and not detract from corporate communication channels. Aptly named "cleverphone", the customer service **communication application enables upwards of 10,000 calls per month** to be efficiently and expertly handled through the various call center teams in the USA, Germany and Japan.

"Our new cleverphone solution builds upon key features and functionality that we had become dependent upon for providing our customers with high level service, while opening up new avenues for efficiencies and improved customer experiences," continued Javanshad. "At the heart of it, CounterPath's solution just works, and we couldn't be happier with our new branded clients".

Another key factor in selecting the CounterPath solution over open source options is the level of compliance, support, and security provided to cleverbridge. "With the open source alternatives, **you're at the mercy of the community and there's no guarantee on support, resolutions, or security**. We have to adhere to policies and regulations and simply couldn't risk compromising on the integrity of our solution" continued Marc, "With CounterPath we know that a real company is on top of things, providing us with support, security patches, and escalation paths if we need them, giving us a peace of mind that open source solutions simply can't."

About cleverbridge

cleverbridge provides an all-in-one subscription ecommerce solution for monetizing software and SaaS. Its cloud-based ecommerce platform optimizes the customer experience, **simplifies recurring billing, and offers comprehensive global compliance and payment capabilities**. Leading B2C and B2B companies rely on cleverbridge expertise and technology to acquire more customers, minimize churn and maximize global revenue. cleverbridge is headquartered in Cologne, Germany with offices in Chicago, San Francisco, Tokyo and Taipei.

About CounterPath

CounterPath is revolutionizing how people communicate in a BYOD and mobile workforce. Since 2002, its Unified Communication solutions have been recognized as an industry and user favorite. Its flagship Bria softphone suite of clients enable secure VoIP audio and videocalling, messaging, presence, and collaboration tools across multiple devices and operating systems, including the flexibility to overlay market leading call servers.

