



Consumer Education Services Inc.

CLIENT: CESI

EMPLOYEES: 80+

LOCATION: Raleigh, North Carolina

PLAN: Nextiva Office Pro

“ **When we switched to Nextiva, I don’t even think we dropped a call - it was seamless.** ”

- Tim Weaver, IT Specialist, CESI

CUSTOMER OVERVIEW

Founded in 1998 in North Carolina, Consumer Education Services Inc., or CESI, is a 501c3 non-profit credit counseling agency committed to promoting and assisting consumers on the road to economic security. CESI provides face-to-face counseling and phone counseling, as well as web-based education and solutions to meet the needs of each individual or family. Since 1998, CESI has helped more than 500,000 consumers through debt management, budget counseling, bankruptcy counseling, and more.

DILEMMA

CESI started considering options for a new communications system in late 2016 to replace their previous platform, which was difficult to work with. Frustration with this system stemmed from many issues, and deliverables weren’t being met, which was time consuming and cumbersome to over eighty employees. The agency was looking for a solution that was flexible and easy to use. communications system across different locations.

RESOLUTION

The research process for a new communications provider didn’t take long, as Nextiva was recommended to CESI by Connectivity Source, their telecom partner. After looking into the features, they found Nextiva offered Auto Attendants, intuitive agent dashboards, and the Nextiva App. They also liked that the Call Centers and Advanced IVR (Interactive Voice Response) features had the ability to route calls based on zip codes, so CESI could control call flows to adjust priority between their call centers. After evaluating the features available, CESI decided to switch to Nextiva in Spring 2017.

The onboarding process entailed working with Nextiva to establish their desired setups, and building and testing call flows with alternate numbers; then they were able to program initial features to get up and running.

To implement their cloud-communications system, CESI’s IT team went through a few ‘train the trainer’ sessions, and instructed management how to use their needed tools afterward. They also held a few classes to train their call center agents how to use call queues. The Nextiva App helps CESI’s staff stay connected, as the organization has team members working in multiple locations nationwide. Jean Elias, VP of Marketing, CESI, said the most rewarding aspect of their partnership with Nextiva is the team. She is happy with the service and features Nextiva offers that help them make a difference in the lives of their customers.

FAVORITE FEATURES



Auto Attendant



Nextiva App



Nextiva Office Pro



Advanced IVR