



# CASE STUDY



## Feature-rich cloud-based phone system installation CURZON WEALTH MANAGEMENT

### ABOUT

Curzon Wealth Management delivers personalised advice and support for a wide range of financial services including investment planning, estate protection and finance management. The company have 13 years of industry experience and have built an excellent reputation for providing outstanding service helping clients to achieve their financial goals.



### BUSINESS CHALLENGE

- The telephone system in place utilised outdated technology and was unable to support enterprise features such as call routing, voicemail to email and call recording. The business experienced poor broadband speeds and older handsets with no caller display.
- The company required a modern phone system with the ability to record calls whilst adhering to compliancy regulations.
- It was an important consideration to route all incoming calls. When the company number is called, calls can be routed to specific handsets and not others, such as the Managing Directors phone.
- Finally, additional handsets were necessary to fully support all required phone system features to improve daily operations and enhance the customer service provided.

“ Our cloud phone system with management features guarantees we are offering the best customer service possible. Caller display and the UCE application have streamlined our communications.

Matthew Curzon



### KEY SOLUTIONS



#### KLOUDPBX PHONE SYSTEM

Feature-rich, cloud-based phone system with the latest technology.



#### FIBRE BROADBAND

Superfast fibre broadband connection.



#### NEW HANDSETS

With key features such as caller display and call forwarding.



#### SELF-MANAGEMENT

Ability to manually make changes to the system by using the simple web portal.



#### MOBILE APP

Field-based staff can stay connected to the office when out on the road. This ensures inbound calls are routed to both the office handset and mobile phone – resulting in no missed business opportunities.



#### CALL RECORDING

Call recording on all handsets to comply with company guidelines.



#### ACCOUNT MANAGER

Local manager oversees the companies account and conducts monthly reviews.



#### ONGOING SUPPORT

The DataKom team is always on hand for any queries.

Call us today on

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