

Case Study: Thompson, Liss & Associates



Thompson, Liss, & Associates

“ClarifyOffice™ has allowed us to provide effective, efficient communication between our clients and their customers.”

David Liss, Owner, Thompson, Liss & Associates

Quick Facts:

Industry

Marketing Services

of Users

1 – 15

Objective

To provide the clients of Thompson, Liss & Associates a shared office system that delivered the quality services and support they needed to succeed.

CUSTOMER PROFILE

David Liss is an experienced business owner who knows how to achieve maximum results efficiently. He has invested time in researching the most cost-effective ways of using technology to leverage his time, and communications to provide absolutely the best service and support to his customers. When David helped found Thompson, Liss & Associates, he was already aware of ClarifyOffice and had assessed its capabilities.

CHALLENGES

Thompson, Liss & Associates provide a wide variety of services to insurance brokers including outbound calling for marketing, inbound phone routing with redirection to live service reps, message-on-demand options, and fax-on-demand. They also provide scheduling and appointment setting for a number of clients and shared calendaring that can easily be accessed by the client. They needed a structure that would allow them to upload documents into a file system and then create a link to those documents and post those links to a website.

OBJECTIVES

Because they provide such a wide variety of services, David needed a single solution that would allow his company to:

- ✓ Provide a toll-free number with multiple extensions
- ✓ Set appointments on a shared calendar and send invitations to clients and their prospects/customers simultaneously
- ✓ Store documents and easily provide access to those documents from any website

SOLUTIONS

David knew that ClarifyOffice was the system that would provide him with everything he needed. With the help of Clarify’s support team, he began using some of the more advanced features to set-up call-flows for the toll-free numbers he provides his clients.

“I really haven’t had the time to master all the possibilities of the phone system and your support team has been a tremendous help in that regard,” David said.

One thing he also noted is the level of support for Mac users.

“Creating fax documents with the Mac presented me with a challenge but your support team was quick to help me convert these documents and load them into my system. I have been very impressed with the level of support that I have received.”

The flexibility of the telephone system allows David to not only provide message-on-demand services and route calls to live reps but also to play proprietary on-hold messages while calls are being transferred. He also uses the ClarifyOffice File Manager and Calendaring to meet his other needs.

RESULTS

ClarifyOffice 5.0™ system works wonderfully for David and his team. Because of this technology, they are able to:

- ✓ Provide their clients the quality service and support they need
- ✓ Duplicate their success with each new client

“I am very happy with this system.”

WEBSITE

thompsonliss.com