

## CASE STUDY

# SurfControl

## migration to a global village solution

### SurfControl's Leading Edge IP Communications Backed by Premium Support from KRP Communications

Founded in 1997, SurfControl ([www.surfcontrol.com](http://www.surfcontrol.com), 831-440-2500) employs over 600 employees worldwide, with headquarters in Scotts Valley, California; and offices in Sydney, Australia; Manchester, United Kingdom; Beijing, China; Israel; France; Germany; and several other countries. SurfControl provides a portfolio of security solutions to protect its customers from Internet threats, while delivering business and regulatory compliance and enabling business continuity. The company protects nearly 16 million users in over 25,000 customers worldwide.

"Our customers range from small law offices and schools to large retailers and global corporations," said Max Rayner, SurfControl's Executive Vice President of Products and Services and Chief Information Officer. "All of these customers demand 24/7 dynamic zero-day protection and technical support for a mix of on-premise and on-demand security services."

### Coping with Business Communications Limits

Growing principally by acquisition, SurfControl had inherited many diverse PBXs and telecommunications systems through the various organizations coming into its company.

"We had the task of integrating several different PBX and voicemail systems during these acquisitions," said Max Rayner. "This created technical limitations and made it difficult for us to respond to new business demands. Our IT organization quickly saw that continuing along this line would make system administration very cumbersome, and pose roadblocks to business innovation."

The technical limitations of a diverse set of propriety PBXs generated high maintenance costs and forced traveling

employees to "figure out" how to use each different solution when visiting different offices. The lack of a uniform telephony platform with a future horizon for growth also constrained SurfControl from implementing new telephony solutions that could enhance its sales and service.

### Challenge

To interconnect a diverse set of phone systems while providing VoIP, call rerouting, intelligent queuing, integrations to key systems and ongoing support.

### Solution

KRP Communications implemented and orchestrated a global village solution that satisfied all of SurfControl's requirements.

"SurfControl had been waiting a long time for the ability to interconnect phone systems and migrate to a global village solution," said C.T. Woo, SurfControl's Vice President of Information Technology and Internet Engineering. "The company wanted to achieve "follow the sun" technical support which would require that systems interconnect and work together to transfer calls from system to system. This was not achievable with the legacy systems without

limitations and workarounds. The ongoing pain caused by outages and limitations became a decisive factor."

### Finding a New Solution

As a communications-centric business, SurfControl recognized that a premium telephony solution was vital to its business. Company executives, business and technology staff identified five critical requirements for their new telephony solution:

- Voice over IP (VoIP) communications that reduced the expense of long distance calling for a global organization where telecommunications was at its heart;
- The ability to reroute calls at any time to subject matter experts and to "follow the sun" call center agents who were distributed around the world;
- Intelligent queuing that could complement the decision process for call routing determination;
- Productivity tools with rich feature sets and integration to key systems like CRM (customer relationship management) that gave SurfControl sales and customer service

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employees the ability to tailor their work environments for optimum productivity and to deal with the customer with the highest quality.

- Premium training and ongoing support.

“At the onset of our proposal process, we selected five different vendors to interview and quickly narrowed our choice to two,” said Jim Keller, SurfControl’s Director of Network Security and Telephony. “When Interactive Intelligence and its KRP Communications reseller/service team came to our site and configured a call center on the spot during our meeting with all of the features that we were looking for, it was a huge differentiator. Their technology seemed to fit exactly what we wanted for our global organization.”

The solution designed and deployed by SurfControl’s Network Security and Telephony team, KRP and AT&T consisted of products from both Cisco and Interactive Intelligence. Cisco’s architecture for voice, video and integrated data (AVVID) provided a VoIP infrastructure over a global MPLS (multi-protocol label switching) network, while Interactive Intelligence’s telephony provided the seamless handling of customer interactions. KRP Communications functioned as system architect, designing a redundant dual-server call center solution for each of three geographically separate call centers.

Because it was heavily reliant on Web-based technology, SurfControl wanted to optimize its customer “touch points” of phone calls, faxes, emails and Web pages to create a customer experience that would deliver premium service every time.

“We were implementing a sophisticated IP-enabled integration engine that could automate virtually every aspect of business communications,” said Jim Keller. “This included full support of phone, email, fax or Web chat—and the multimedia ACD capability to handle those interactions and business users. We wanted to monitor and tack traffic across a worldwide system for high productivity and performance in our customer service operations. In teaming with KRP, we were ensuring ourselves the highest quality of telephony and network expertise.”

### Implementing the New System

SurfControl decided on an aggressive one-year deployment of the new telephony solution across all of its U.S. and offshore sites.

“This was a very ambitious deployment that began in September, 2006, and completed in September, 2007,” said Jim Keller. “The planning cycle occurred during the first 90 days. After that, we had three major call centers in different areas of the world to change over to the new telephony platform. All had different proprietary PBXs that had to be migrated from.”

Planning team members were SurfControl; KRP Communications; Interactive Intelligence; and AT&T. “Planning was comprehensive, but in the end, each party involved in the project knew what, when and how we were going to do this project and everyone signed off on their portion of the commitment,” said SurfControl’s Max Rayner. “This enabled me to just go to the project plan to see who had charge of a particular piece of the project at any point.”

Rayner acknowledged that the aggressive timeline presented major challenges. “We deployed the entire system worldwide in nine months,” he said. “Considering that we were dealing with different variables around the world, this was a formidable effort. Concurrently, we upgraded all of our global WAN/LAN systems, so the challenge was two-fold. The project plan called for the breaking down of old infrastructure and the setup of the new system at each location over a weekend. Turn-up, training and “go live” was done during the week following.”

KRP handled the interactions between the user base and the telephony systems in addition to working with AT&T in a “war” room. As issues came up, they were captured and addressed in level of priority.

“KRP was instrumental in our planning process and particularly in developing a comprehensive telephony architecture that would satisfy all of our requirements,” said SurfControl’s Jim Keller. “I was not completely comfortable with a complete software call center solution at first, as my prior background was with Cisco Call manager. KRP orchestrated a dual implementation of both the Cisco and the Interactive Intelligence platforms with full redundancy that also gave us a highly effective disaster recovery and business continuation platform. Now, I couldn’t be more pleased.”

C.T. Woo stressed the importance of working closely with a business partner that was willing to learn about the end business in addition to installing telephony. “In an aggressive worldwide deployment like this, you really need a company that is willing to learn about what you have and about your end business, and what your customer interaction needs

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are,” said Woo. “KRP came in, listened and developed a solution that could take us to the next level of our communications and our business....We prepared the equipment and provided access to it. Together with KRP, we then deployed equipment, with KRP playing the part of deployment project manager with us. The effort went flawlessly, and our CEO and her executive staff were ecstatic.”

### Mission-Critical Service and Support

Beyond implementation, SurfControl wanted a business partner capable of supporting its telecommunications needs on an ongoing basis. These needs began with the IT and end user training that occurred during system implementation and cutover.

“The new system is very intuitive but the training we felt was going to be a critical portion of the success of the entire project,” said Jim Keller.

“We had negotiated a sum of training during the original deal and so we just had to decide how we would handle it. The user base was trained day one of the cutover as we had already setup a schedule with KRP to provide three classes a day for the first three days of “go live.” We have an internal help desk group that handles day to day moves, adds, changes and deletes to the system, so they also needed basic training in system administration. KRP customized and performed the training of all of our IT staff and our end users. The training was very thorough, and everyone knew the system well by the end of training. This enabled a seamless cutover.”

The addition of KRP as an ongoing business partner is helping SurfControl address the limited IT resources it has internally for handling specialized areas like telecommunications. “The premium technical support that we receive from KRP allows us to add more customers and more capability to our call center telephony without adding to IT staff with either people or projects,” said Max Rayner.

SurfControl plans to extend the engagement of KRP as it adds offices, businesses and products. “KRP is very responsive in issue resolution, which all call centers have,” said Max Rayner. “It also has talented, deeply knowledgeable staff who have helped us every step of the way. KRP has been an essential ingredient in a successful system deployment.”

### Reaping the Benefits

SurfControl is now formalizing metrics that it plans to use for

cost, quality and performance. Already, the company has seen a ten percent gain in the operational efficiency of its call centers.

KRP also integrated SurfControl’s telephony with salesforce.com, SurfControl’s in-house CRM system. Sales and service personnel can now see detailed accounts of phone conversations with customers while they are engaged in calls. The system presents screen popups for quicker transactions, and offers simple point and click dialing to accounts.

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“We have seen substantial improvement in the performance and the accuracy of our CRM system that has greatly benefited Sales,” said Calkins. “In the past, we got information from the system on various customer activities but we didn’t always have the ability to ensure that the information was accurate. This made it

difficult to measure our performance and our true accountability with the customer. Now we have a desktop suite of sales tools that allows us to view who’s on the phone with the customer, and to see “to the minute” and summary reports on each of our customers. We can review phone calls to assess the quality of interactions that our agents are having with the customers.”

Equally as important is the “insurance” SurfControl now has for continued telephony operations, due to the redundant failover architecture defined and implemented by KRP.

“As a business, we look at many kinds of metrics, but the most important goals are have to be sales growth and customer delight,” said Max Rayner. “Even with all of the benefits of our new system, if we are not taking calls, we are not doing business. The system, with all redundant components, has never been down or caused a complete interruption in sales or technical support. This is amazing compared to SurfControl’s prior history. KRP met and exceeded their commitments to make this a very successful deployment and to make sure that our SLA to our customers has been met. We are now looking at extending our relationship with KRP to more of an ongoing administrative support vs. a deployment project. This change will establish a daily health check of the system, weekly status reports and automatic problem resolution, without needing to look at time spent on a single issue. The relationship has been so successful that we wish to continue with their staff taking the lead on support even though we now have the training to manage these issues internally.”

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### Conclusion

In one year, SurfControl was able to eliminate outdated PBX systems around the world, and unify a global communications infrastructure on a single telephony platform with leading edge call center features and sales/service tools for optimized customer care. Concurrently, it was able to ensure optimum service, support and uptime levels with major contributions from KRP.

“Our new systems have changed the face of SurfControl,” said Max Rayner. “We have easy to integrate, open systems; full redundancy and failover; the ability to monitor all interactions with standard network equipment and tools; and seamless end to end reporting. Unlike many enterprise deployments where the ultimate verdict is mixed and time reveals more flaws, KRP has been an extraordinary partner and has proven a greater delight with each passing day.”

### Benefits

- Eliminate outdated PBX systems around the world within a year and unify a global communications infrastructure.
- Use KRP Communications as a business partner to provide ongoing technical support.
- Increase customer service through an integrated suite of sales and call center tools.



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## KRP Communications

KRP is a complete communications solutions provider delivering intuitive, open standards-based solutions that enhance customer relationships by leveraging superior converged technologies. Visit [www.krpcomm.com](http://www.krpcomm.com) for more information.