



Online Trading Academy is the world leader in Investing and Trading Education with a community of over 200,000 investors. Started in 1997, Online Trading Academy became one of the largest trading floors in the U.S. with over 180 traders averaging over half a billion dollars in trading transactions daily. In 2001, Online Trading Academy made the shift to solely providing investing and trading education and today maintains a trading community of investors who have learned to trade with the skill and confidence of professionals.

In gaining new clients and in supporting our active investor community, our contact center operation has become a critical aspect of our marketing strategy, business operation, and supports our growth initiatives.

| The Challenge

Supporting our contact center with state-of-the-art technology has been a driving force within our operation in keeping pace with our growth initiatives and in supporting our valued clientele. As a result, we purchased ShoreTel and the ShoreTel Enterprise Contact Center solution. However, finding a knowledgeable contact center support partner had been an ongoing issue. Our past partners, while seemingly knowledgeable, were unable to resolve long-standing technical issues and had little to no time to dedicate to our operational needs, unless we had an open ticket. While opening a support ticket tracked technical software issues, we needed focused time to address our business operational opportunities.

We needed a business partner who understood contact center technology inside-out, and we needed an operational expert in contact center business management who could help us diagnose operational obstacles, isolate technical problems, and provide meaningful solutions to help Online Trading Academy in meeting our revenue potential.

| The Solution: *Inflow's CCSM Consulting Program*

Fortunately, we found Inflow Communications. Through Inflow's **Contact Center Success Management (CCSM)** Consultant Program, we found both a technical expert and an operational master in contact center.

The assigned CCSM consultant spent two full days with our team focusing his attention in understanding our business goals, objectives, and operational processes from the inside-out. The 2-day CCSM assessment included our Chief Marketing Officer, Director of Information Technology, DB Administrator, IT Manager, Telecom Engineer, Contact

Center Supervisor and staff. Our CCSM consultant worked side-by-side with our technical experts, which not only provided deeper level product training, we learned nuances of the application and processes we had not understood or seen previously.

Our CCSM is great at following up and makes himself available to us in continuing to assist our teams in ways we had not been supported previously. Our CCSM continues to maintain contact with Online Trading Academy just to “check in” on our progress and to offer support.

| The Results

A result of our 2-day CCSM Assessment, the CCSM consultant produced an 80-page in-depth report, with a full analysis of the process improvement opportunities, outlined recommendations, quick-hit how-to guides for each recommendation, and....

With the input and recommendations of our CCSM consultant, Online Trading Academy has increased our conversion rate by 10% within 45 days of receiving our CCSM report and implementing his recommendations.

Our CCSM isolated another operational issue involving our 3rd party overflow contact center, and as a result, we have a pending RFP out replacing an otherwise underperforming center. Lastly, our CCSM resolved two software-related issues that had been unresolved for over a year by our previous support partner.

Our CCSM understood that we are a hands-on technical operation, and recommended a toll-free tracking service allowing Online Trading Academy to gain complete control of our analytics and marketing data, while allowing us to fine-tune our strategies, all focused on growth and increased revenue.

Want to learn more?

Visit our website for more information about our CCSM Program
www.inflowcomm.com

| Customer Quotes

“With Inflow’s CCSM consultant program, we have completely removed technology as an obstacle to contact center performance. We have seen our conversions and revenue increase since implementing the recommendations provided by our CCSM consultant.”

“Through the Inflow CCSM consultant program, we were able to identify key operational obstacles and have resolved two software issues that had been left unresolved for over a year by our previous support partner.”

About Inflow

Founded in 1997, Inflow Communications is a national leader in unified communications and Contact Centers. With over 100,000 endpoints under Inflow’s innovative support plans around the world, their dedication to knowledge, innovation, and unrivaled customer support has landed them in ShoreTel’s top 2% in global customer satisfaction, and as a winner of ShoreTel’s coveted Circle of Excellence Partners award. For two years in a row, Inflow is a ShoreTel Platinum Partner, the highest level of partnership, and is their fastest growing partner globally. In addition, Inflow is one of the few Cloud Contact Center providers that offers implementation, ongoing support, and comprehensive consulting and training programs. Inflow services clients across the globe and has local offices in over 10 major cities in the US.