



HOW ZOOM TRANSFORMED AN INSURANCE BROKERAGE



INTRODUCTION

JM Wilson is an insurance broker in Michigan with eight locations and struggled to find a phone solution that best fit their business's needs. Tim Pickett, the Director of Technology at JM Wilson, reached out to Millennia shortly after he started to get help with their phone system.

THE REAL IMPACT

Before Tim started with JM Wilson, the company tried RingCentral and an 8X8 phone system; however, neither option fulfilled the company's needs. When Tim started with JM Wilson, the company was actively using Nextiva. **Unfortunately, the company was having major problems with verifying the availability of employees with this software.** This became deeply problematic since all customer calls came to the receptionist, and she was responsible for transferring those calls out to the right people who could be at any of JM Wilson's eight locations.

With the difficulty of seeing availability across all locations, many customers became frustrated when their point of contact was unavailable when their call was transferred. Also, employees were interrupted by phone calls when unavailable, like in the middle of a meeting. This became a contentious subject within the company and had negative impacts both externally and internally.

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CALLING IN THE EXPERTS

WORKING THROUGH THE PROBLEM

Pickett had worked with Millennia before at his prior employer and saw major success with the telephone system Millennia had implemented there. Pickett trusted Millennia and was confident they could help him solve the telephone problems at JM Wilson, so he reached out.

Millennia listened to Pickett's concerns with their current system, their needs, and the company's future goals. With that information, Millennia evaluated all of the different solutions, looking at ShoreTel or Mitel phone systems, but they also decided to look at Zoom, a relatively new software at the time.

The more Millennia vetted the options, the more clear it became that Zoom was likely to be the best option for JM Wilson.

Zoom is a software that allows users to create and join virtual meeting rooms where they can communicate with each other using video and audio. Additional features can give participants the ability to share their screens, share files, and use text chat within the meeting group or privately with others in the meeting. Zoom is an app that can be used on a computer or mobile on a cell phone. **Since the pandemic, Zoom has become synonymous with video conferencing and connectivity.**



“And really that was the turning point. **It was [Millennia's] recommendation that really got us going.**”

- TIM PICKETT

JM Wilson did a proof of concept with Zoom and immediately fell in love with the software. **When it came to implementing Zoom across the business, Millennia took the lead, provisioning JM Wilson's old hardware to work with Zoom, ordering additional hardware when necessary, and getting JM Wilson in contact with Zoom to set up the business.**



