

TRINITY FINANCE: FROM FRAGMENTED CALLS TO FINANCIAL CLARITY

The Customer

Trinity Finance is a UK-based mortgage broker and financial advisory firm providing impartial advice to clients across a wide range of needs.

As a regulated organisation, Trinity Finance requires a communications environment that supports compliant, auditable and professional interactions with clients, while enabling consultants to work efficiently and maintain strong relationships.



THE CHALLENGE

Future Voice was originally brought on board to implement a RingCentral communications platform. Trinity Finance had been using an 8x8 system for approximately four years, but the platform wasn't meeting the needs of the business and had largely fallen out of use.

Due to poor implementation and limited adoption, consultants reverted to using personal mobiles to communicate, resulting in major operational and compliance challenges:

- Lack of centralised control over customer interactions
- Gaps in regulatory compliance and auditing
- Fragmented communications across multiple systems
- Reduced visibility for management

It was initially assumed that RingCentral would exceed the capabilities of the existing platform, however further analysis revealed that the required functionality could have been achieved within the original 8x8 environment.

The core issue was not the technology itself, but the absence of proper guidance, configuration and user enablement during the initial deployment.

THE SOLUTION

Future Voice delivered a structured RingCentral environment focused on compliance, usability and long-term sustainability, establishing a consistent and centralised way of working across the business while enhancing the experience for consultants.

KEY FEATURES

- **Standardised Call Recording:** All customer interactions are now recorded and centrally managed, ensuring a complete and compliant communication history.
- **AI Transcription:** Automatic capture and storage of full conversation records within back-office systems, reducing administrative effort and enhancing compliance.
- **Group Calling and Call Filtering:** Reduced unwanted or cold calls reaching key personnel, allowing consultants to focus on high-value client interactions.
- **Working Hours Profiles:** Ensured consultants only receive calls on personal devices when appropriate, including the management of holiday cover.
- **Voicemail Management:** Improved auditing of client messages within RingCentral.
- **Migration from Microsoft Teams to RingCentral Meetings:** Consolidated collaboration tools into a single platform, ensuring all meeting data is centrally retained.
- **RingCentral Scheduler Integration:** Enabled consultants to schedule meetings directly through their Outlook calendars, streamlining client engagement.
- **Number Spoofing:** Implemented to support a recent recruitment drive, allowing new consultants to communicate with clients immediately while maintaining a consistent business identity.

The project was delivered on an accelerated timeline, with **just 10 days from initial kick-off to go-live**. This rapid deployment minimised disruption and ensured that every team member, including newly recruited consultants were fully operational from day one.

THE RESULTS

The implementation delivered significant operational, compliance and cultural benefits for Trinity Finance.

Improved compliance and governance

- All customer interactions are now recorded and centrally stored.
- A consistent and compliant way of working has been established.
- Enhanced auditing and reporting capabilities support regulatory obligations.

Increased efficiency and productivity

- Communications are streamlined within a single platform.
- AI-powered transcription reduces manual administration.
- Integrated scheduling simplifies meeting coordination with clients.

Enhanced consultant experience

- Improved call management supports a better work-life balance.
- Working hours profiles and call filtering ensure consultants remain accessible without being overwhelmed.
- Immediate onboarding of new hires ensures business continuity.

By delivering a fully adopted and compliant communications environment in just 10 days, Future Voice enabled Trinity Finance to modernise its operations, reduce risk and enhance both consultant and client experiences.

"Future Voice helped us transform the way we communicate with our clients. The new system has given us the compliance and visibility we needed, while also making it easier for our consultants to manage their day-to-day interactions. What really stood out was their consultative approach and the speed at which they delivered the solution. The project was completed in just 10 days, and the team ensured everything was configured and adopted properly from the outset. It's clear that the success of the project was driven not just by the technology, but by the expertise and guidance provided by Future Voice."

OMER MEHMET, MANAGING DIRECTOR, TRINITY FINANCE

The fact that all requested functionality could have been achieved within the original 8x8 platform highlights a key lesson many businesses miss: **successful outcomes depend as much on implementation quality and expert guidance as on the technology itself.**

