



Solution Brief

The Nortel Software Communication System 500 in action

Here's how four companies in four different vertical markets gain the benefits of unified communications through the Nortel Software Communication System 500 solution.

Introduction

The Nortel Software Communication System 500 is a standards-compliant unified communications solution designed to interoperate and incorporate SIP-based applications, devices and services. Specifically designed for small and medium businesses (SMBs) with 30 to 500+ users, Software Communication System 500 has the power to accelerate communications and collaboration between employees, partners, suppliers and customers.

The following scenarios illustrate how the Nortel Software Communication System 500 can help four SMBs — each in different vertical markets

— benefit from a unified communications solution. The companies described below are fictitious business entities — however, the situations described, as well as the benefits of unified communications as implemented with the Software Communication System 500, are very real.

Software Communication System 500 in action: Professional Services iQ Communications Inc.

iQ Communications is a full-service marketing communications firm. It offers communications planning, advertising, public relations, database and

direct marketing, interactive multimedia and technical documentation.

A privately held company, iQ is headquartered in Toronto, Ontario, with satellite offices in Waterloo and Mississauga. It also supports home-based employees across the Greater Toronto Area. iQ currently employs approximately 150 full-time employees.

Challenges

When iQ opened a new office in Waterloo to serve the needs of its clients in the Southern Ontario Technology Triangle, the company needed a way to cost-effectively provide productivity-enhancing applications to iQ's Waterloo staff, including its mobile workforce. The new Waterloo office gave iQ the opportunity to start with a clean slate. iQ's IT manager, Chris Spalding, had some definite ideas about what he wanted to do.

“With the Waterloo location, we had an opportunity to try something new,” says Spalding. “We wanted to increase productivity while keeping our costs down, and we knew that a unified communications solution fit the bill on both fronts.” Chris also had to keep in mind that the company was upgrading its data networking — not only for



employees within the satellite location, but for mobile employees as well. As a result, access to advanced collaboration capabilities also played a factor in the decision.

Since iQ was a long-standing Nortel customer, the company's channel partner had kept Spalding up-to-date on Nortel's developments in unified communications. "We looked into Nortel's unified communications solutions and liked what we saw," says Chris. "It was ideal for the new location."

He spoke to iQ's Nortel account representative about the company's options. The company's headquarters location in Toronto was running VoIP in a mixed environment, backed by bandwidth, QoS and management. There was already a VPN in place between the Toronto and Mississauga facilities; Spalding planned to extend it to the Waterloo office as well. To help keep costs down, he planned to make the Waterloo office an IP-only facility. After discussing iQ's options with the company's Nortel representative, Spalding decided to unified communications-enable iQ's Waterloo office with a Nortel Software Communication System 500 solution.

Solution

- **Nortel Software Communication System 500**, a unified communications solution that puts telephony, Voice/Unified Messaging, Presence, Instant Messaging (IM), applications and collaboration tools — like video conferencing and voice conferencing — right on a user's desktop.
- **PSTN Gateways** including Foreign Exchange Station (FXS) Gateways which connect iQ's fax machines and analog cordless phones, and Foreign Exchange Office (FXO) Gateways for the company's digital trunking.

- **Nortel IP Phone 1535** delivers a full range of telephony features plus support for point-to-point video calls between 1535 sets and Software Communication System 500-supported Softphones.
- **Nortel Softphone 3455** features a dialpad-centric interface, giving mobile employees a familiar, intuitive way to manage their Voice, Video, Instant Messaging (IM) and Presence applications on their laptop.
- **Microsoft Outlook Plug-In** lets users import their address books into their contact lists and dial directly from the application. From there, they can establish a call using manual entry, redial, drag-and-drop from their contacts, Inbox or profile, or even directly from an email message.

Benefits

In the short period of time since iQ adopted the Software Communication System 500 in its Waterloo office, the company has already seen noticeable productivity gains. With the power to initiate a range of communications from their familiar Microsoft Outlook environment, employees are enjoying *the convenience and time savings of having all their vital communications a single click away*. "I've been getting very positive reviews from my people," says Spalding. "They like having that ability to check and manage all their messages on their PCs — including the ability to handle voicemail messages like email messages."

The ability to transition seamlessly from one means of communications to another has also been a plus for the employees at iQ Waterloo. "The people at the Waterloo office have really gotten into starting a conversation with, say, an IM chat and — if the situation requires — quickly initiating a phone call or a conference call right from the interface,"

observes Spalding. He adds that the ability to make and receive calls from an email message is another popular feature. "It has *really cut down on the amount of time* it takes for folks to start and end a discussion. I'd say they're saving around 40 minutes a day."

The road warriors are also reporting positive experiences with the Softphone 3455. "Our senior account service people, who spend a lot of time on the road, love it," says Spalding. He notes that the ability to easily set up and participate in video conferences has enabled iQ's mobile employees to stay in touch and be productive while they're on the road.

Additionally, the Find Me/Follow Me functionality has drastically reduced the amount of time office-bound iQ employees spend searching for their mobile counterparts. "With the Software Communication System 500 solution, employees can connect the first time. There's a lot less calling around, firing off emails and shouting over the walls to see who's in the office and who isn't. And when they fill out their timesheets, we're seeing savings of anywhere from 25 to 40 minutes a day on administrative communications."

The Software Communication System 500 has also helped iQ see savings in conferencing costs. Instead of setting up an expensive conference bridge through a third party, with the Software Communication System 500's conferencing capabilities iQ Toronto employees can set up IP-based conference calls on the fly, allowing them to be more flexible and react to situations faster. And it pays off — the Waterloo office has seen savings of up to 30 percent on conferencing charges compared to what it would have cost through a third-party conferencing provider.

As IT manager for iQ, Chris Spalding appreciates the *simplicity of management* Software Communication System 500 offers. “You don’t have to be a telephony expert to set it up.” The Software Communication System 500 management console is intuitive and easy to learn. And, since Software Communication System 500 puts advanced telephony functions like conferencing and Find Me/Follow Me preferences in the user’s hands, Chris has a lot less maintenance work to do. “They’re happier because they have more control; I’m happier because I have less grunt work to do.”

Chris also appreciates the *ease of provisioning* users with Software Communication System 500. “You literally just plug in a user’s desk set and, with a few clicks, they’re ready to go.” Software Communication System 500, along with the Nortel IP Phone 1535, makes moves, adds and changes

easy — a user’s settings are stored on the desk set, so they follow the user wherever the user takes their set.

Finally, iQ uses the Call Detail Recording functionality of Software Communication System 500 to better understand their call flows. “The fact that I can get detailed CDRs (Call Detail Records) is fantastic... we can either view it directly from the online portal or export it with a couple of clicks — we’ve recently started to integrate this with our billing processes which should save a lot of time.”

Since the company deployed the Software Communication System 500 in its Toronto office, iQ has seen rapid productivity and financial gains by using just a few of the many features available on the server.

Cost savings for the company are averaging \$400 a month on long distance and cellular charges. By combining

Softphones Instant Messaging and the customization capability of Find Me/Follow Me, iQ has *eliminated the need for employees to make long-distance calls on company land lines and cell phones.*

Plus, the ability to communicate more effectively has reduced the need for employees to travel — resulting in another \$400 per month saved. By converging business communications and applications, employees can accomplish much more at their desks — so they have to travel less. When combined with the 30 percent savings on conference calling, Software Communication System 500 is paying for itself quickly.

With the company’s business growing rapidly, everyone knows Software Communication System 500 is up to the job. “With the ability to scale to over 500 users,” Spalding says, “we’re confident that the system can grow with us.”

Software Communication Server 500 in action: **Financial Services** **LaFay Financial Group**

Established in 1998 with five employees, this Grand Rapids, Michigan-based financial services firm has grown to more than 200 associates located in five different offices across the state.

Challenges

Disseminating new product information and company procedures to sales representatives in the LaFay Financial Group used to mean a barrage of emails, faxes, conference calls and constant back-and-forth phone calls between branches and the head office. The system worked fine when LaFay consisted of only two offices, but with over 100 representatives spread across the state of Michigan, it was time to implement a new approach with unified communications.

“To grow the business, we realized it was important for our representatives to be able to access information on financial products and services and stay in touch with their customers — whether they were in the office or on the road,” says LaFay CIO Wayne Cargill.

“Like the market, our inventory of insurance products, annuities, mutual funds and business client solutions is changing all the time,” notes Cargill. So instead of leaving it up to the individual representatives to provision ad-hoc communications solutions in their branch offices, LaFay decided to



standardize with a unified communications solution.

“It gets everybody on the same page, it ensures standardization of our processes and it helps reps deliver more responsive customer service,” Cargill explains. “We wanted to give our reps and staff access to real-time information on products, solutions and market information while giving our customers a one-number/one-call solution for reaching their sales representative. The customer experience is what differentiates us from the competition, so our reps in the field need to always be accessible.”

“Between our new product development and the dynamics of mutual fund markets, there’s a constant stream of information the whole organization needs to stay up-to-date on. So the information flow has to be current, in real-time.”

Solution

LaFay had been supporting an aging Nortel Meridian Option 11C at each office location. While the 11Cs were cutting edge when they were installed, it was time to upgrade. LaFay’s Nortel channel partner proposed a unified communications solution from Nortel as the ideal solution to meet their immediate needs, as well as providing scalability for anticipated future growth.

The new network promised a significant reduction in communications costs. More important to LaFay were the anticipated improvements in employee productivity and mobility. LaFay and the Nortel Channel Partner agreed that a Nortel Software Communication System 500 in each of their five offices was the optimal approach for their business. The LaFay Software Communication System 500 solution includes a mixture of the following at each of the five sites:

- **Nortel Software Communication Server 500**, a unified communications solution that puts telephony, Voice/Unified Messaging, Presence, Instant Messaging (IM) and application/collaboration tools — like video conferencing and voice conferencing — right on a user’s desktop.
- **A high-availability design** for the head office, as LaFay wanted increased redundancy there as part of their business continuity strategy. This configuration uses two servers (primary and secondary) with load balancing between them for additional resiliency.
- **A series of Nortel Business Ethernet Switch 210s**, which are stackable and available in 24- or 48-port models, giving LaFay the scalability they need for future growth.
- **PSTN Gateways**, including Foreign Exchange Station (FXS) Gateways, that connect LaFay’s fax machines and analog cordless phones, and Foreign Exchange Office (FXO) Gateways for the company’s digital trunking.
- **LG-Nortel IP Phone 6800 Series** hard clients purpose-built for the needs of small to medium-sized businesses and offering a full range of big business features at a small business price.
- **A Nortel Softphone 3456** for their reps in the field uses a contact-centric interface based on a user’s address book to provide a unified communications interface for Voice, Video, Instant Messaging and Presence applications.
- **A Microsoft Outlook Plug-In** for most of their corporate staff lets users import their address books into their contact lists and dial directly from the application. From there, they can establish a call from manual entry or redial, drag-and-drop from their contacts, Inbox or profile, or even dial directly from an email message.

Benefits

Since LaFay adopted their unified communications solution with the Nortel Software Communication System 500, the company has achieved noticeable business improvements.

Instant Messaging (IM), voice/video conferencing and Unified Messaging have *dramatically reduced the company’s email traffic and voice messages* — giving LaFay representatives more time in their workdays. “I’ve heard it from people across the organization,” states CIO Cargill. “They really like having all their messages accessible on their computers, along with the IM and the conferencing capabilities.” The Unified Messaging capabilities of LaFay’s Software Communication System 500 solution *enables reps to spend less time managing calls and messages, and more time doing meaningful, productive work and meeting with customers.*

Mobile personnel have warmly embraced the company’s new solution. “The reps love the Softphone,” Cargill says. “When they aren’t on the road meeting clients, they can work from home without missing a beat.” If a representative needs to set up a quick meeting with their office or staff at head office, the Softphone drag-and-drop interface lets them organize and initiate a conference meeting in moments.

The Personal Auto Attendant feature on Software Communication System 500 is also receiving top marks from the sales force and customers alike. “A representative can set their own menu options according to the best ways they can be reached,” notes Cargill. “That increases the chances of a client getting a warm body — and a response to their requests. It just promotes a better customer experience with the rep and LaFay overall.”

Since migrating from their Meridian Option 11C system to the Software Communication System 500, LaFay has not only seen lower communications costs (such as long distance and cellular charges), but has also seen *major improvements in employee productivity and customer service ratings*. This has translated directly into increased revenues. With Software Communication System 500, mobile sales teams are better informed and better connected to internal subject matter experts as well as customers. “Our sales teams are telling us they are more productive and our customers are telling us they’re getting better service. As a result, our sales continue to increase,” says Wayne Cargill.

In his opinion, and by all other accounts, LaFay’s SCS Software Communication System 500 implementation has been a huge success. “To my knowledge, we are the only financial services organization in the state that has gone this far down the road with building a unified communications network. The results speak for themselves.”

Software Communications System 500 in action: **Real Estate** **Trans Gulf Real Estate Group**

Established in 2000 with two offices and twenty employees, this Alabama-based real estate firm now has a network of over 400 agents spread across 10 offices throughout the state.

Challenges

Keeping track of property sales and rentals at Trans Gulf Real Estate Group used to mean constant back-and-forth calls between branches to update information on listed properties. This practice was sufficient when the company had only two offices, but after

growing to nearly 450 staff members — including 400 agents working in offices across the popular, fast-growing area of Mobile Bay — it was time to implement a new approach with unified communications.

“To grow the business, we realized it was important for our agents to be able to share information on properties with multiple branches, and stay in touch with their customers while they were on the road,” says Trans Gulf CIO Peter Smith.

“Our inventory is made up of homes that are on the market — both for sale or for rent. That inventory is spread out over a large area. So instead of building our business on small, siloed franchises, we decided to pool our resources and share them across our branches to maximize our returns.”

“Trans Gulf also wanted to give agents and staff *access to real-time information* on inventory movement — including property sales, change of ownership, leasing renewals and so on — while giving customers a one-number/one-call solution for reaching their agent.

“If a property is up for sale or rent, the whole organization needs to know about it,” added Bob Hampson, Sales Director of Trans Gulf and Director of the group’s Fairhope and Spanish

Fort offices. “The same is true if there’s a price reduction, a new listing or if a property is withdrawn — it all has to be in real-time.”

Solution

Trans Gulf’s Nortel channel partner proposed a unified communications solution as the ideal solution to meet their immediate requirements, as well as providing a scalable path for the future.

The new networks promised some significant cost savings, but more important to Trans Gulf were the anticipated improvements in employee collaboration and information sharing, as well as increased accessibility for customers. Trans Gulf and its Nortel channel partner agreed that the optimal approach was to implement a Nortel Software Communication System 500 in each of their ten offices, and integrate some of the key features and applications within their business processes.

The Trans Gulf Software Communication System 500 solution includes:

- **Nortel Software Communication System 500**, a unified communications solution that puts telephony, Voice/Unified Messaging, Presence, Instant Messaging and application/collaboration tools — like video conferencing and voice conferencing — right on a user’s desktop.



- **A high-availability design** for their head office, as Trans Gulf wanted increased redundancy there as part of their business continuity strategy. This configuration uses two servers (primary and secondary) with load balancing between them for additional resiliency.
- **A series of Nortel Business Ethernet Switch 210s**, which are stackable and available in 24- or 48-port models, giving Trans Gulf the scalability it needs for future growth.
- **PSTN Gateways**, including Foreign Exchange Station (FXS) Gateways, which connect Trans Gulf's fax machines and analog cordless phones, and Foreign Exchange Office (FXO) Gateways for the company's digital trunking.
- **LG-Nortel IP Phone 6800 Series** hard clients that have been purpose-built for the needs of small to medium-sized businesses like Trans Gulf, offering a full range of big business features at a small business price.
- **A Nortel Softphone 3456** for their reps in the field, which uses a contact-centric interface based on a user's address book to provide a unified communications interface for Voice, Video, Instant Messaging and Presence applications.
- **A Microsoft Outlook Plug-In** for most of their corporate staff, that lets users import their address books into their contact lists and dial directly from the application. From there, they can establish a call from manual entry, redial or drag-and-drop from their contacts, Inbox or profile, or even dial directly from an email message.

Benefits

Since the Trans Gulf Real Estate Group adopted their unified communications solution with the Nortel Software Communication System 500, the

company has noticed many improvements in their business.

"Our office staff use the Microsoft Outlook Plug-In," Smith notes. "We get a lot of listings information requests via email, so having the *ability to make phone calls directly within the application saves them a lot of time with follow-up work.*"

"The agents love the contact-centric Softphone," adds Hampson. "They don't even have to dial numbers anymore. They just look up the customer's name and click a button. And they can do it using any Internet connection." If the agents need information from their office on a particular location, they can quickly use Instant Messaging (IM) and Presence to know who's available and send an IM for an immediate reply.

The Find Me/Follow Me feature on Software Communication System 500 is also receiving top marks from agents and customers alike. "*Agents can set their preferred way to be reached with just a few clicks on the online portal — it takes less than 30 seconds to do,*" says Peter Smith. "It's true — I've timed it," Hampson confirms. Agents can set up Find Me/Follow Me based on the time of day or day of week, and have their different numbers ring at the same time or in a certain order, giving them maximum flexibility.

Trans Gulf has integrated this capability into its business processes. If a field agent is not available when a customer calls, the call will immediately be routed to either a colleague or the main office line (or both), which means a customer rarely gets voicemail. "What makes Trans Gulf stand out is our customer service," says Smith. "Software Communication System 500 helps ensure our field reps have the informa-

tion they need, and are always accessible to customers."

Trans Gulf's Software Communication System 500 unified communications implementation has been a raving success. Field agents are more productive, processes are more efficient and Trans Gulf is not only saving money but also improving customer service levels substantially. "In this business," he says, "that means success."

Software Communications System 500 in action: Manufacturing Laser Image Corporate Printing

Laser Image Corporate Printing is a full-service print-on-demand company. It offers full color and black-and-white printing, binding, fulfillment services, database and direct marketing opportunities, and technical documentation print solutions.

A privately held company, Laser Image is headquartered in Durham, North Carolina. It supports a production team of 32 people as well as a sales force of 15, including the sales representatives, in-house customer service representatives and the administrative team.

Challenges

Laser Image specializes in print-on-demand — and that demand is usually accompanied with a "needed it yesterday" time frame. As a result, the company's mobile sales reps must be able to contact their customer account managers, production team members and truck drivers as soon as a new business opportunity presents itself.

At the same time, the company's inside production team members and customer services reps need to be able to locate the mobile sales reps quickly. Reps are the first point of contact for



each customer, so they are typically the first to know the details of a job. The process of getting jobs in through the system, proofed, approved and finished for delivery is elaborate. Each step of a job depends on clear and immediate communication.

Yet email and phone conversations were often not enough to adequately describe the complex folds, cuts, binding and fulfillment requests posed by Laser Image's customers. Consequently, the company needed a way to enable its mobile sales reps and internal staff to accurately convey and confirm the precise requirements of each job.

Additionally, Laser Image frequently serves clients located outside of the state — even overseas — which resulted in steep long distance charges. These charges added significantly to the company's operating costs, and accordingly, management was looking for ways to reduce them.

When Laser Image moved to a new office in the Research Triangle Park in Durham, the company saw an opportunity to introduce cost-effective, productivity-enhancing applications to the entire organization. With the chance to start from the ground up, IT Manager Travis Palmer saw SIP in the company's future.

"We wanted to deliver more responsive customer care while lowering our communications expenditures overall," says Palmer. "We knew that the right SIP-based solution could potentially fulfill both goals, while giving us some future-proofing." Since the new network had to meet the data needs for mobile employees as well as employees within the new location, advanced collaboration capabilities also factored into the decision.

Solution

Laser Images was a long-standing Nortel customer, and the company's channel partner had kept Travis Palmer up-to-date on Nortel's developments in unified communications. "We looked around, did some homework and talked to our communications partner. All roads seemed to lead to Nortel's unified communications solutions — we liked what we saw," says Palmer. "Unified communications was ideal for the new location."

As a SIP-based solution that runs on standard industry hardware, the Nortel Software Communication System 500 delivered all the unified communications and cost-control advantages Palmer was looking for.

The Laser Image Software Communications System 500 solution includes:

- **Nortel Software Communications System 500**, a unified communications solution that puts telephony, Voice/Unified Messaging, Presence, Instant Messaging (IM), applications and collaboration tools — like video conferencing and voice conferencing — right on a user's desktop.
- **Two Nortel Business Ethernet Switch 210s** with Power over Ethernet, which are "stackable" and available in 24- or 48-port models, giving Laser the scalability they need for future growth.
- **A Nortel Business Access Point 120**, which is a secure WLAN solution with simplified management and Power over Ethernet, and a wireless reach of up to two times that of the leading competitor.
- **PSTN Gateways**, including Foreign Exchange Station (FXS) Gateways, which connect Laser's fax machines and analog cordless phones, and Foreign Exchange Office (FXO) Gateways for the company's digital trunking.
- **LG-Nortel 6800 Phones** have been purpose-built for the needs of small to medium-sized businesses like Laser, offering a full range of big-business features at a small-business price.
- **Nortel Softphone 3455** features a dialpad-centric interface, giving Laser's mobile employees a familiar, intuitive way to manage their Voice, Video, Instant Messaging and Presence applications on their desktop.
- **Microsoft Outlook Plug-In** for most of their administrative staff that lets users import their address books into their contact lists and dial directly from the application. From there, they can establish a call from manual entry, redial, drag-and-drop from their contacts, Inbox, or profile, or even directly from an email message.

Benefits

Since Laser Image adopted their unified communications solution with Nortel Software Communication System 500, the company has achieved their goals.

“We saw productivity improvements almost immediately,” notes Palmer.

“Sales reps can set up a quick meeting with their customer service counterparts back at the office and work out the details of a job on the spot. They can even set up an immediate videoconference to give that extra layer of understanding of the job requirements. It really impresses our customers.”

Software Communication System 500's other advanced conferencing capabilities, including Find Me/Follow Me, Scheduled and Instant Conferencing, are also used within their business processes. Laser Image staffers use MeetMe conferencing for internal review sessions, Scheduled Conferencing for formal customer meetings, and Instant Conferencing for “emergencies and escalations,” which come with the on-demand nature of their business. Say IT Manager Travis Palmer, “When it comes to a complicated job, a rep can pull in everybody on one call — customer service folks, design, pre-press... everybody. *By integrating*

unified communications with our business processes and policies, everyone is on the same page.” Getting all hands on deck, especially at the start of a project, means internal staff spends less time calling and emailing between the sales reps, and one another, over the course of a job.

Laser Image has also seen lower conferencing, long distance and cellular charges over the past few months.

“Between VoIP, alternative communication vehicles like IM and voice/video conferencing, the use of the Softphones, and even adoption of some of the features like Find Me/Follow Me, our communications costs have decreased by over 30 percent!”

Unified Messaging and the call recording capability have also helped *increase both the accuracy and efficiency of their customer delivery process.* “With Unified Messaging, we can have all the voicemails and emails related to a project in one place...and with our customers' permission, we can even record our project-related conversations to ensure that even the smallest detail isn't missed.”

Looking ahead, Palmer sees the company taking further advantage of Software Communication System

500's scalability as well as anticipated evolution with more SIP-based features. “We've got about 50 employees right now but are growing tremendously, so scalability is important. What is also important is the fact that Software Communication System 500 is based on SIP, which means I know we've got a *great hedge against technology obsolescence.*”

No matter what direction Laser Image chooses with respect to its business communications, Software Communication System 500 is ready to take it there.

Business made simple.

When it comes to affordable, unified communications solutions that reduce costs, enhance productivity and increase revenue for SMBs, look no further than Nortel — a company that has been delivering voice and data systems to companies large and small for decades — and which continues to lead the market in small and medium business communications today. To find out more about Nortel Software Communication System 500, visit www.nortel.com/scs500.

Nortel is a recognized leader in delivering communications capabilities that make the promise of Business Made Simple a reality for our customers. Our next-generation technologies, for both service provider and enterprise networks, support multimedia and business-critical applications. Nortel's technologies are designed to help eliminate today's barriers to efficiency, speed and performance by simplifying networks and connecting people to the information they need, when they need it. Nortel does business in more than 150 countries around the world. For more information, visit Nortel on the Web at www.nortel.com. For the latest Nortel news, visit www.nortel.com/news.

For more information, contact your Nortel representative, or call 1-800-4 NORTEL or 1-800-466-7835 from anywhere in North America.

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