



CUSTOMER SUCCESS STUDY

Converged Technology Professionals helps large regional bank navigate to the cloud by comparing various cloud-based communications and contact center platforms.

THE CHALLENGE

With their legacy on-prem ShoreTel system about to become obsolete, this financial client looked to adopt communications tools that could provide modern upgrades and work-from-anywhere flexibility.

THE SOLUTION

With the help of Converged Technology Professionals, the bank was able to compare cloud-based communications and contact center platforms and implement RingCentral MVP and Contact Center for their business.

About This Client:

This regional bank has provided customized financial service solutions that sync with its customers' needs, goals, and dreams when and where they need them. Located in Chicago since 1987, this financial institution is \$1.2B strong with 255 RingCentral users at 12 national locations.

AGING PHONE SYSTEM LACKS FLEXIBILITY AND SECURITY

When the Senior Vice President of Information Technology at this financial institution realized the firm's old ShoreTel phone system would soon become obsolete, he knew it was time to investigate more current technology.

Several issues plagued the old platform. Stationed at their headquarters, it required a complex web of interconnecting devices going out to their multiple locations. In addition, because it consisted of hard phones, bank staff who regularly worked off-site couldn't communicate with teammates or customers unless they were at their desks.

The SVP had previously worked with Converged Technology Professionals when they'd encountered issues with the current ShoreTel phones. He knew he could trust them to act on the bank's behalf to find a new provider, then design, implement, and support them throughout and beyond their migration.

We have been very happy with our decision to move to RingCentral and appreciate the value Converged brought to the table as a partner with their advice and ongoing support.

SVP of Technology

REASSURANCE OF A TRUSTED RINGCENTRAL PARTNER

Converged Technology Professionals Senior Account Executive Scott Dressel knew that security and flexibility were vital since the bank not only deals with sensitive information regularly, but the team also has diverse needs due to the hybrid nature of their workforce.

Dressel researched the best providers and narrowed them down to several viable options, including 8x8 and Zoom. He then presented leadership with a side-by-side comparison breaking down cost and feature highlights.

This financial institution's leadership team ultimately chose RingCentral, primarily because of Converged's relationship as a RingCentral Premier Partner. They knew Converged would bring a level of oversight that other partners couldn't and that this was the best way to ensure a pathway to success with the migration.

In addition, it didn't hurt that RingCentral's platform offered a myriad of features beyond the capabilities of the old system. RingCentral is the only provider certified by HITRUST, a highly secure platform that passes stringent security guidelines. Moreover, RingCentral provided excellent flexibility spanning across departments, including contact center, and allowed this bank's workforce to mobilize easily and work from anywhere using the same tools available to them whether they were in the office or not.

We chose RingCentral because of their relationship with Converged Technology Professionals. Thus, Converged can bring oversight to the project other companies didn't have. We wanted a partner that knew what to do and how to get there.

SVP of Information Technology

TECHNICAL ACCOUNT MANAGER MAKES MIGRATION SIMPLE

With the platform chosen, it was time for this financial institution to plan and implement the migration. The Technical Account Managers at Converged Technology Professionals oversaw the entire project from start to finish.

The lead TAM conducted twice-weekly planning meetings. From the information gained, the TAM team organized the move, designed the system to include functionality that made sense for the end-users, and ensured the set-up between the bank's contact center agents and bank staff worked properly and cohesively. The Converged TAM team also performed training, so bank staff understood how to use the new platform. The process was quick, taking only about two months because of our expertise and relationship with RingCentral.

SOUND INVESTMENT PAYS OFF FOR REGIONAL BANK

Investing in the company's future, its customers, and employees by adopting communication tools aligned with today's modern business needs has paid off for this regional bank. The system provides a level of agility and confidentiality never experienced before, and the new contact center technology gives agents the ability to manage calls from the bank's main phone line easily.

They've noticed many other additional benefits as well:

- One RingCentral app gives all staff access to the same communications tools no matter where they work.
- Real-time collaboration tools accessible in all locations mean pertinent information is ready, so customer service agents are more efficient and productive.
- Bank customers enjoy improved service levels partially due to omnichannel capabilities with several modern contact options.
- Softphones offer flexibility and are available through a computer or cell phone.
- RingCentral integrated hard phones in common areas work with the system for added continuity.
- Elimination of 3rd party vendors for services like faxing saves revenue and improves morale due to a reduction in app overload burnout.

Overall, this client is delighted with the ease of the whole project, from planning to implementation, administration, and support.



www.voipswami.com
877-328-7767
info@voipswami.com