



## A LENDING INSTITUTION UPGRADES TO THE CLOUD



### Result

The customer offloaded responsibilities for handling the onerous upgrades and patches for its communication systems to a trusted partner.

### Outcome

The customer moved into the ConvergeOne Cloud Experience (C1CX) private cloud, with ConvergeOne taking control of its upgrades and patching to free up internal resources to focus on core business issues.

- Cut soft costs associated with maintaining its systems
- Strengthened business continuity

### Customer Challenge

A national lending institution that helps subprime car buyers obtain auto financing was seeking ways to better maintain its systems. The company had recently consolidated to a single location, with an IT team of around only five people to support 500 users. The IT team lacked unified communications (UC) and contact center enterprise expertise and, while it had offloaded much of the heavy lifting, the team was overwhelmed by having to maintain the call systems, call recording, and workforce management solutions. The company wanted to keep its skill sets in-house, but its lack of internal UC and contact center expertise and the demands associated with continually maintaining its systems have left it searching for outside assistance – and previous bad experiences have left it wary.

The company had to perform upgrades on its systems and it brought in a third party to handle the upgrade, but the process ended up being extensive and onerous. With the next upgrade quickly approaching, the company needed to get out of the cycle of time-consuming upgrades and patches and reduce the role it played during the upgrade process, while ensuring the systems remained up-to-date.

Knowing this, the chief information officer (CIO) turned to the company's long-term advisor, ConvergeOne, for assistance. ConvergeOne implemented its contact center more than ten years prior and managed the environment with the exception of updates, patches, and moves/adds/changes. While the company was open to working with its trusted partner, it was reluctant to undertake a costly project. The company was limited by a conservative budget, but eager to explore cost-effective solutions that would lead to improved management of its communications environment.

The company hired a consulting firm to explore a variety of options for offloading the management of its communications solutions, from



a straightforward managed services agreement to a private cloud environment—or perhaps a more gradual transition to the cloud. Budget was, of course, a concern, and the company had a number in mind that it was unwilling to stray too far away from.



## The Customer's Desired Outcome

**“We need to get out of the cycle of demanding and time-consuming upgrades and offload the responsibilities to a partner whom we can trust to maintain our systems.”**

*– Customer's CIO*

## The ConvergeOne Response

During renewal conversations, ConvergeOne brought in its dedicated managed services team to conduct a site visit and talk through the challenges with the customer. Because ConvergeOne had built a strong relationship with the customer, the challenge was not in determining the proper solution and transitioning the customer to it, but in arriving at a cost that fit the customer's budget.

ConvergeOne identified the customer's pain points within the upgrade process and chose to move the customer into the ConvergeOne Cloud Experience (C1CX) private cloud, taking control of its upgrades and patching. While the solution immediately resonated with the customer's needs, it became hesitant after seeing the initial cost, primarily around the Calabrio portion of the solution. ConvergeOne worked to restructure the solution and negotiated with Calabrio, one of its premier partners, to get to the right number for the customer.

## Results

At the time of sale, the customer did not provide the current operating cost model for its existing system, and as a result, there is not a confirmed ROI. However, the customer has cut many of the soft costs that come with maintaining a communications system. The upgrade cost is spread out over five years, and ConvergeOne has committed to conducting upgrades every two years and maintaining patches.

As a result, the customer does not have to hire additional staff with UC expertise to handle the upgrades. The customer's team members no longer feel the pressure of having to handle and oversee the onerous upgrade process, so they are able to focus on operating their business instead of worrying about maintaining their communications environment.

The customer also has a disaster recovery site at a secondary data center that is coming up for renewal. With the move to private cloud, the customer has newly available real estate in place that can be used for this site. The customer can realize savings by retiring its separate disaster recovery site and leveraging the new footprint.

The customer has already been working with ConvergeOne for years, so it is pleased to continue the positive relationship with the ConvergeOne managed services team. ConvergeOne remains a trusted advisor, and with the trend toward hosted IT, there are many opportunities for the company to grow its relationship with this customer.



## BUILD A SMARTER PATH TO THE CLOUD

Get started on your custom path to the cloud with our quick and simple C1CX diagnostic tool:  
[convergeone.com/c1cx](https://convergeone.com/c1cx)

