



ENTERPRISE MODERNIZATION PLANNING FOR A LARGE FINANCIAL INSTITUTION



Challenge

A large financial institution that provides consumer banking and nationwide Business Processing Outsourcing (BPO) services needed to replace or upgrade its aging communication system. The system was near end-of-life and required significant investment to upgrade, as it lacked the capabilities needed to accommodate both the consumer banking branch business and the BPO contact center.

Compounding the problem was the fact that the institution's IT/communications staff had limited resources. They did not have the time to proactively consider the business users' needs, nor to conduct a detailed investigation of competing telecommunication solutions.

The Customer's Desired Outcome

To quickly establish a pathway to achieving communication system transformation objectives:

- Assure long-term capability to meet the user community and contact center's evolving needs
- Eliminate obsolescence and the costs associated with manufacturer licensing and software and hardware updates
- Simplify operation and administration of the telecommunications environment

Solution

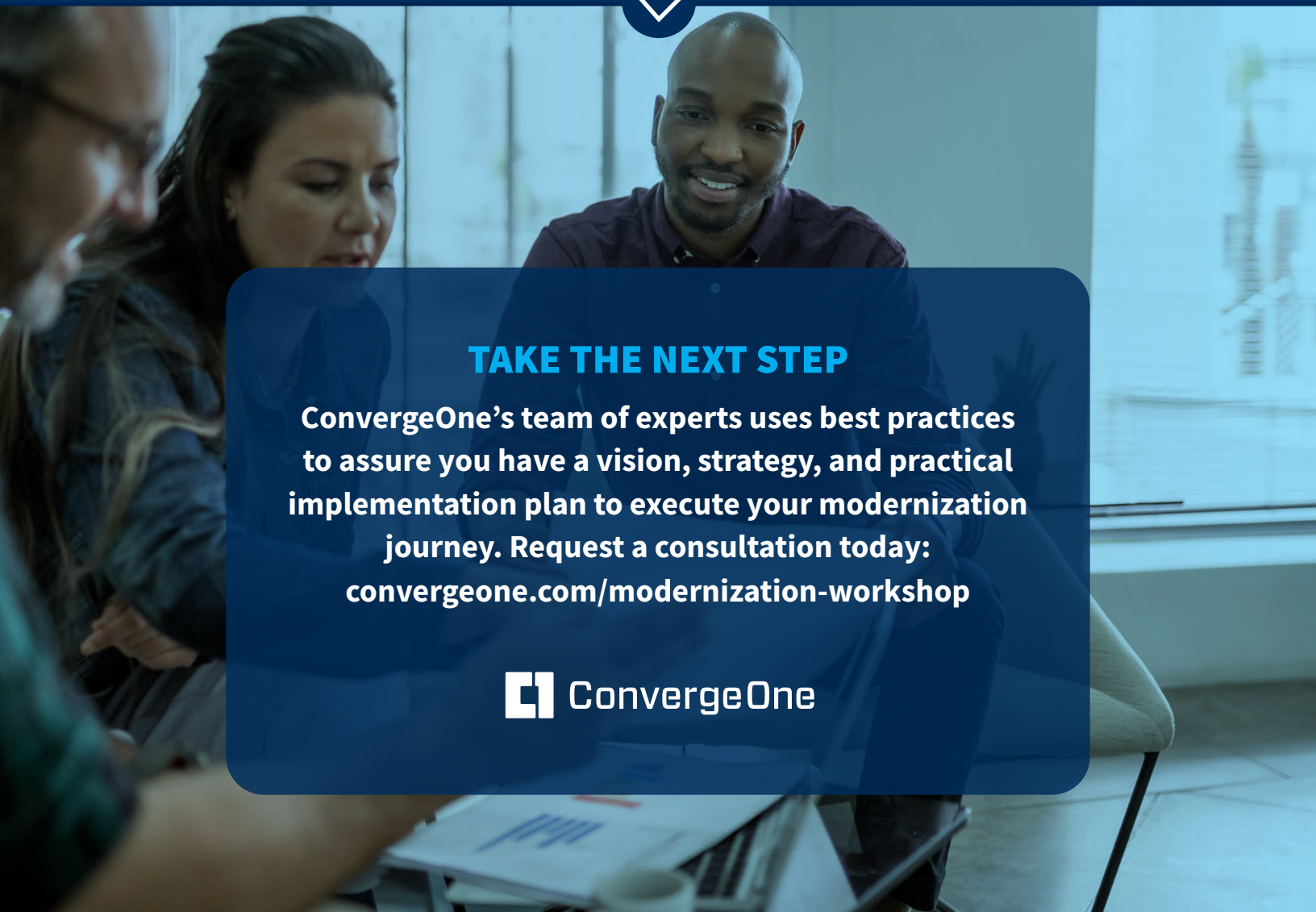
ConvergeOne's **Enterprise Communication Modernization Planning Advisory Service** was used to help the customer quickly establish a pathway for achieving its Unified Communications, Customer Experience and Collaboration transformation objectives. The service, conducted over a period of two weeks, consisted of a series of workshops and discovery sessions that culminated in the identification of an architecture and solution that best met the customer's needs.

Structured workshops were used to educate the customer on the practical capabilities that could be expected from modern communication systems as well as to dispel common misconceptions (e.g., omnichannel vs. multi-channel, reliability, cost). ConvergeOne proprietary modeling tools were applied to identify the architectural model (e.g., hybrid, cloud, on-premises) that would best meet the customer's need. Discovery sessions with line of business owners identified key business outcomes and the operational and functional needs that must be provided to fulfill communication service dependencies.

Results

ConvergeOne developed a cloud-based architecture and set of best-fit suppliers. The solution set offered the customer the greatest degree of functionality, scalability, and operational capabilities to meet short-term and long-term needs. The enterprise modernization plan included:

- Identification of the business outcomes, functional requirements, and technical needs that must be satisfied today and long-term by the solution
- Simplification of acquisition and support for the Unified Communications, Customer Experience, and Collaboration services
- Elimination of obsolescence via a scalable architecture and set of solution suppliers that could assure feature/function capability into the foreseeable future



TAKE THE NEXT STEP

**ConvergeOne's team of experts uses best practices to assure you have a vision, strategy, and practical implementation plan to execute your modernization journey. Request a consultation today:
convergeone.com/modernization-workshop**

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