



RESULT

The merging banks moved to an end-to-end Cisco solution, with a Collaboration Flex Plan, fully managed by ConvergeOne.

SIGNIFICANT DATES

Initial Engagement: October, 2015

Merger: October, 2016

OUTCOME

The merging banks consolidated and integrated their systems, reducing complexity within the data center and freeing up IT staff to focus on strategic objectives like growing the business rather than managing systems that had grown beyond their expertise.

BENEFITS

- Discounted costs due to packaging the solution in a Cisco Enterprise Agreement
- Streamlined experience
- Improved change management

Customer Case Solution: Merging Banks with Clashing Data Center Strategies

Customer Issues

It all started with a cupcake drop. Bradon Slapak, ConvergeOne National Account Manager, was told that the bank, satisfied with its existing partners, was not looking for a change. Bradon remained persistent, which first paid off when the bank partnered with ConvergeOne to upgrade its Cisco Unified Communications Manager from Version 9 to Version 10.5. While this was a small project, it allowed ConvergeOne to establish trust and develop a relationship with the bank to drive further business.

The ConvergeOne team continued to meet with the bank's chief information officer (CIO) about its professional and managed services opportunities, which eventually led to the bank selecting ConvergeOne as its managed services provider. ConvergeOne moved the bank's data center within Switch SuperNAP and implemented cybersecurity and enterprise networking solutions.

During the next year, ConvergeOne built out the bank's data center and gained complete visibility into its environment through the managed services engagement. The relationship grew to the point that the bank considered ConvergeOne a key trusted partner. However, over the next few months, the bank was acquired by a similarly sized residential bank that had an entirely different culture and mindset. Its data center environment suffered from unnecessary complexity and redundant products that led to duplicate costs from a solution and management standpoint, while ConvergeOne's customer operated in a much leaner and more agile manner, leveraging ConvergeOne's managed services to focus on strategic growth. As a result, the residential bank had a significantly larger IT staff despite having a roughly equal number of employees.

ConvergeOne had an established roadmap with its existing customer that would allow IT to continue to simplify its operations and focus on growth and profitability rather than the day-to-

day maintenance of the data center. The residential bank was hesitant to move forward with this plan, due its old-school mindset. The chief information security officer (CISO) and his security department held much of the power when it came to implementing new solutions. This led to long strings of approvals that held the business back by causing it to move very slowly.

Because of his relationship with the existing partners, the residential bank's CIO did not wish to work with ConvergeOne. However, the chief operating officer (COO) realized that a change of approach was necessary, as both banks were now owned by a private equity group that desired to shift the focus to accelerating growth in order to receive a return on its investment. Recognizing ConvergeOne's progressive approach, the COO stepped in and asked ConvergeOne to tell him more.



The Customer's Desired Outcome

The merging banks needed to come together as one unified company, with efficient and effective systems. The COO also wished to reduce the data center's complexity and move to a state where the IT staff could focus on strategic business objectives rather than maintenance of the systems.

The ConvergeOne Response

ConvergeOne met with the residential bank's executive team and laid out its key strategy, which focused on consolidation and integration. ConvergeOne also highlighted the strength of its vendor partnerships and the deep relationship it had established with its existing customer. Over the next 18 months, ConvergeOne secured its position as the merged bank's trusted partner by communicating consistently, demonstrating its value as a full-service provider, and educating the customer on emerging trends within the industry.

"We had the opportunity to differentiate because we have local resources, we have expertise across all architectures, and we work together as one team," said Bradon. "From my perspective, the biggest thing is understanding the customer's business challenges. Do they not have enough IT staff, or does their IT staff not have the right expertise? Does IT need to be freed up to work on more strategic activities, like performing due diligence while buying another bank? We determined the business driver and the role IT plays in enabling the business, and we developed a solution that championed the COO to make him look good to the board. It's all about knowing who you're talking to and bringing relevance across the entire business."

ConvergeOne discovered that the internal IT staff did not possess enough expertise in the necessary architectures. The bank was growing quickly and could no longer use small and midsize business-based products, but the IT staff was not comprised of enterprise-level experts at data center, enterprise networking, and cybersecurity. Nonetheless, the bank had to move to enterprise-based products that required additional configuration and services. ConvergeOne provided professional services to help the customer get the right solutions in place to consolidate and improve what it had from an infrastructure standpoint. Since the IT staff lacked expertise on the new enterprise-level technologies, ConvergeOne could manage the solutions for the bank so IT could instead focus on more strategic goals, like growing the business.

The merging banks were using a variety of disparate collaboration tools, including Skype for Business IM and presence, a mix of Polycom and Cisco video endpoints, Avaya phone and contact center, Cisco WebEx, and GoToMeeting. ConvergeOne proposed an end-to-end Cisco solution, with a Collaboration Flex Plan that allowed the customer to consolidate its cloud and on-premises collaboration tools into one user-based subscription, enabling the merged bank to mix and match between the various services that each of the original banks relied upon to remain agile. The solution included data center, enterprise networking, cybersecurity, and unified communications components, with a significant professional services deal for data center, enterprise networking, cybersecurity, unified communications, and Active Directory.

Pure Storage data storage was a key component of the ConvergeOne solution, so while the residential bank's internal IT group pitched an alternative solution that was 30% less expensive, the ConvergeOne team carefully pointed out the key differentiators that made Pure Storage a necessary ingredient to the overall design and strategy. Because ConvergeOne had listened to the COO, streamlining the solution to allow him to focus on the business rather than IT and outlining the steps that would save him around \$5 million each year, he trusted ConvergeOne and got the CEO to sign off on the additional expense.

Results

The merged bank's partnership with ConvergeOne has been very well received from an IT perspective. IT team members are able to receive training directly from the vendors for many of the solutions. This was imperative for employees from the legacy residential bank, in particular, as they had never been exposed to enterprise-level solutions. They now have an opportunity to learn about next-generation, software-defined solutions that exemplify where the industry is going—and the training comes at no additional cost. They've also been given the opportunity to attend conferences and workshops to network with their peers and discuss the new technologies rather than troubleshoot on their own. As a result, they feel more empowered and important to the business.

From a non-IT user perspective, the consolidation has been a game changer. The two banks' systems were previously separate, and by integrating the systems, communication has become much more fluid. The user experience is no longer different across branches. There's now a streamlined experience that users can expect regardless of where they work. Furthermore, 600 employees from the residential bank did not previously have meeting, messaging, and calling services prior to the merger due to high costs. Now all 1,100 users have access to these technologies, and users who had never been exposed to advanced communication technologies now have a variety of options available to them—they can open Cisco Spark rooms, share files, IM coworkers, and see each other face-to-face for the first time over video conferences.

In addition, immediately following the acquisition, users from the acquired company had their preferred technologies stripped away. ConvergeOne was able to add these technologies back, equipping employees with the tools they're comfortable with, thereby enhancing the employee experience and improving change management by reducing negative sentiments about the acquisition.

Because the solution was packaged in a Cisco Enterprise Agreement, ConvergeOne was able to pass off significant discounts to the customer. This customer has received around \$1 million in savings, in addition to significantly more licenses and capabilities. The solution has also helped the merging banks come together faster than they would have otherwise, saving valuable time and resources. Moreover, the subscription can grow 20% without the bank incurring an additional fee.



We are committed to providing you with more information, answer any questions you may have, and create an effective technical solution for your business needs.

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