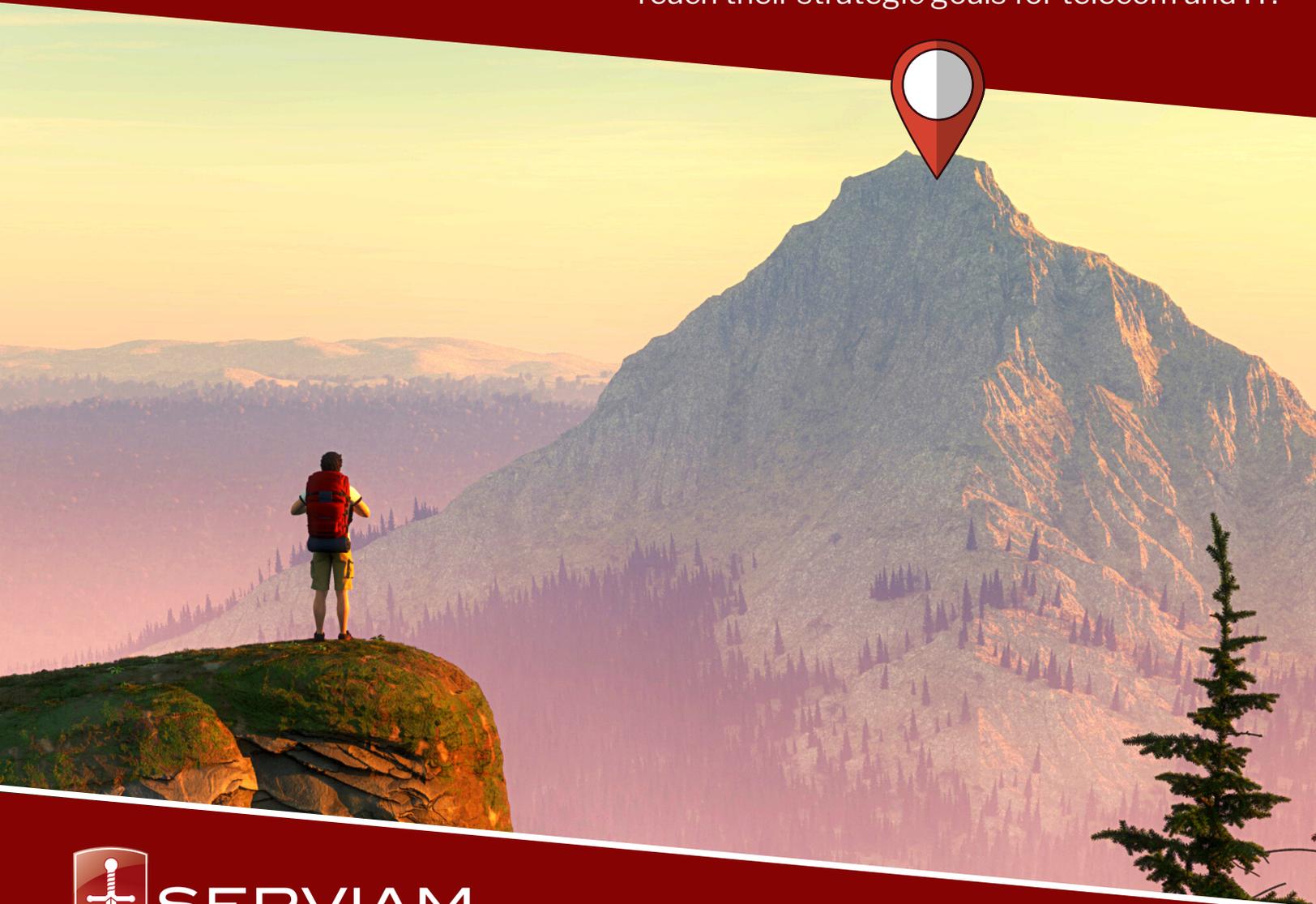


Financial Services Case Study

Learn how this company overcame the obstacles before them to reach their strategic goals for telecom and IT.



SERVIAM
Telecom and IT Vendor Management

Overview of Services at Serviam

Serviam guides companies through a strategy that:

1

Reduces telecom and IT expenses by an average of 30%

2

And uses those savings to upgrade your technology

3

Without operational burdens or out-of-pocket expenses

Our team of experts work alongside yours to provide the labor and specialized skills you need to make this happen, just like we did for the financial services company featured below.



The Company

This financial services firm is a family-owned business whose legacy spans 3 generations and more than 100 years of continuous service to communities in **Idaho, Wyoming, and Montana.**

Most of their 60 offices are located in small, rural towns,

which means that when it comes to connectivity, their options for vendors and technological solutions were limited.



The Problems

SLOW

Their legacy WAN network, provided by a large nationwide carrier, ran on slow, outdated technology.

OVERPRICED

Their service was expensive compared to newer options in the market.

POOR SUPPORT

Their carrier had recently reduced the level of direct resources for support, and they had been redirected to inefficient call centers.



Step One - The Strategic Assessment

Serviam was engaged to assess the cost and contractual obligations for their corporate WAN and find an alternative.

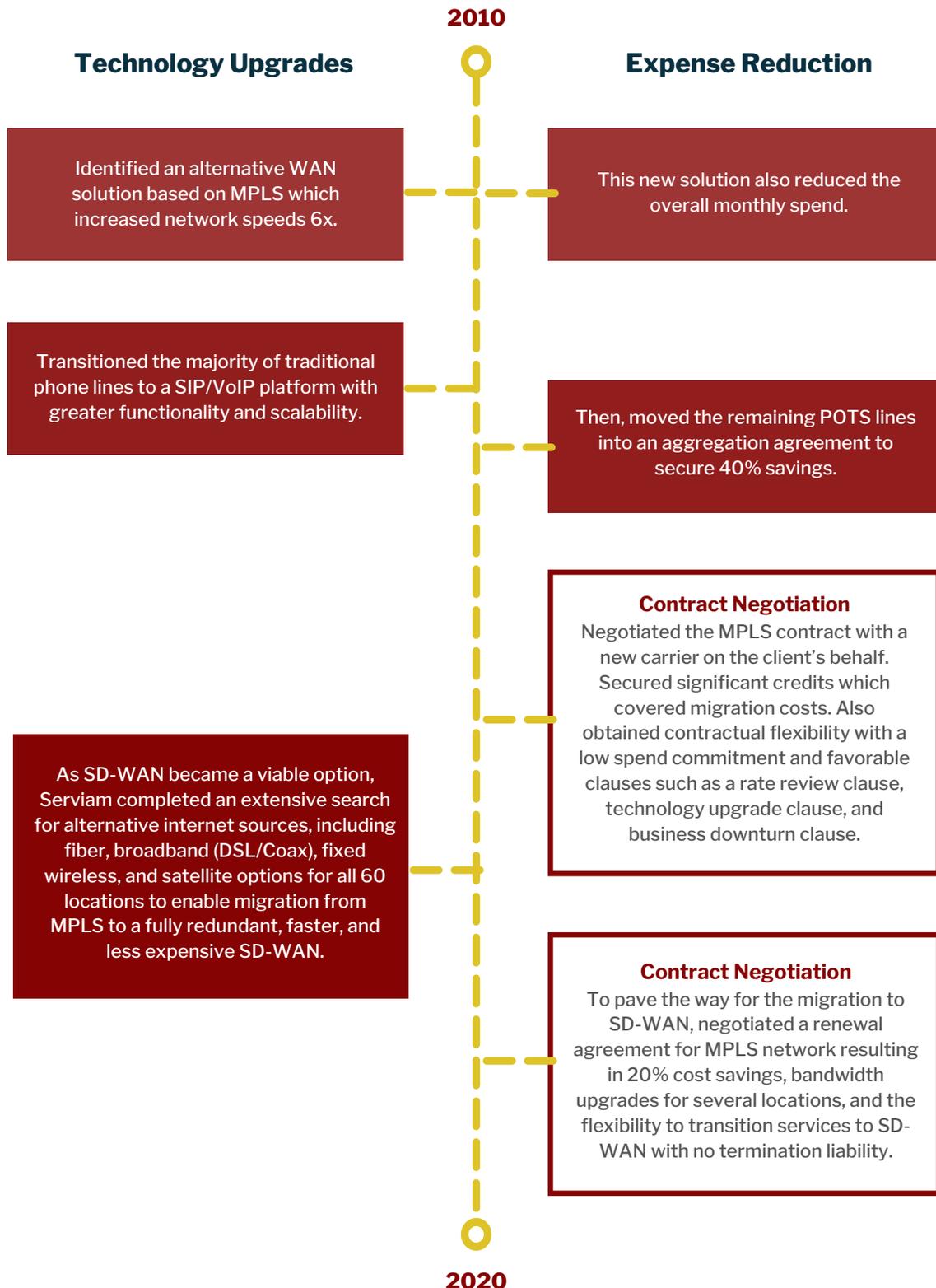
Step one towards finding that alternative was an in-depth assessment of their current environment which included:

- **A complete inventory of all things telecom and IT**
- **Analyzing services and costs by vendor and location**
- **Determining contractual flexibility**
- **Validating their billing vs their contracted rates**



Step Two - Guidance

Once we had a clear picture of the client's telecom and IT environment, we could use it to develop a strategic roadmap for reaching their goals. In this case, it was the path to a better voice platform and data network, and over the course of 10 years, Serviam has guided them to further opportunities like the adoption of SD-WAN.





Ongoing Support

Like many of our clients, this Financial Services firm took advantage of Serviam's Lifecycle Vendor Management services, which included:

- Maintaining a comprehensive inventory of their telecom and IT services
- Ongoing contract governance
- Project management support of network migrations
- Auditing invoices for all 60 locations
- Identifying and disputing billing errors on the client's behalf
- Escalating and monitoring network issues
- Ensuring SLA credits were accurately calculated and applied



Success

In the end, our Financial Services client has been able to overcome the complexity of the telecom industry and the seemingly limited options for their rural offices. They now have:

- ✓ A Faster, More Reliable SD-WAN Network
- ✓ Expenses Under Control (And the ongoing services they need to keep them that way.)
- ✓ Contractual Flexibility for the Changes that Lie Ahead
- ✓ Dedicated, Expert Support for Their Telecom and IT Vendor Relationships

“Thank goodness we had Serviam to advocate on our behalf. They're able to get to people and levels of influence within [our provider] that we never would be able to.”

- CFO

“Serviam is unique. I have more trust in them. I feel they are truly looking out for us. If I have a problem, they just take care of it.”

- DIR of IT



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Jeff Waters
(303) 792-2020

jeff.waters@serviamco.com