



How did a **large Global Financial Services organization** simplify and automate Unified Communications admin to save up to 6 hours a day / divide onboarding time by 6?

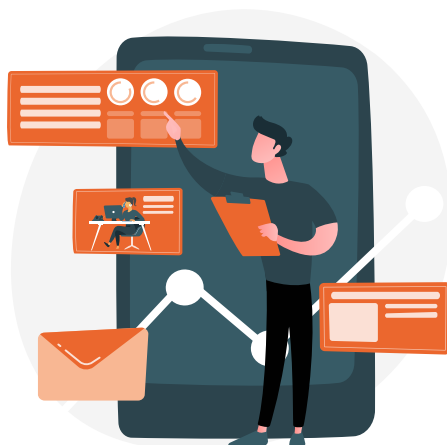
1. What were the main challenges for this financial services organization?

Simplify and automate architecture for provisioning and deprovisioning

In the USA, this company manages 401(k)s and retirement investment accounts for users including high volumes of stock mutual funds. The company was using Cisco Prime Provisioning for onboarding but continued to experience database issues like duplicate entries.

When it seemed like Cisco would drop support for the product, the organization looked for a new solution that also offered a high degree of automation to save time on repetitive tasks - like MACD changes when swapping more than 8,000 desk phones. Given the high number of arrivals, departures, move outs and changes every day, this kind of automation had become essential.

"The less human interaction, the better. This frees us up for all the projects that we work on. We're a project-driven department right now, versus daily moves, adds and changes."



"We have a lot of different roles...so far, Kurmi has been very flexible. We've been able to modify the scripts, so that we can onboard the right people and give them the right package."

2. How was Kurmi deployed?

The company carried out a Proof of Concept (POC) for Kurmi's Unified Communications offering, as well as for a competitor, and automated the solution at one of its smaller sites at Hampton Roads, Virginia. It preferred the simplicity and automation offered by Kurmi, so they started implementation for their entire UC environment.

The company's LA-based UC engineering group oversaw the process – new servers were bought and added to one of the new data centers. Deployment began with professional services in May 2020. A schema was created with Prime Provisioning mirrored until the summer.

By adapting the scripts, 6 different packages have now been created for different employee roles, from Java IM only to a full pack featuring desk phone, Unity voice-mail & more.

3. What impact did Covid-19 have on deployment?

The company had already started working with Kurmi when the pandemic hit North America and a lot of people started working from home. Given the pace of change, some operations were initially done manually like Java configuration. Kurmi was fully operational by July in time for mass boarding for the summer intern program.



"It was a little bit of a learning curve to discover the interfaces and how you navigate. We're at the point now where we're becoming familiar with it by using it every day."

4. How easy was it to make the transition?

Like any transition, moving to Kurmi was a learning experience. Employees were given online training, as well as discovering the different functionalities on the job. Moving forward, 5 or 6 people in the company will be designated "experts" who know the product inside out and can support other users.



5. What have been the benefits so far?

Kurmi Unified Communications software is now used every day for moves, adds and changes, as well as other tasks, many of which are now automated. Kurmi not only covers a wider scope – including departures, removing people, and reconfiguring them – but also saves time. In the past, setting up a user could take up to half an hour, now it takes only 5 minutes, and continues to decrease.

The company is also starting to use Kurmi to audit users and determine if they have the right equipment – does an offshore user really need full UC setup?

"We are very confident. We like the accuracy and we've been able to customize our script. We also save at least two to three hours a day and, when we are really busy, it could be up to six hours a day."



6. What are the next steps?

The company continues to capitalize on the newly installed Kurmi solutions, while also planning the next rollouts. These may include new integrations - like SAP to write extensions and ServiceNow for tickets - to further enhance the experience. The UC team would also like to add advanced features like role-based authentication and granular permission structure in WebEx.

So far, Kurmi is used as the Unified Communication solution in the US but may soon be rolled out in Europe. The company is also deploying a self-care portal, so end users can independently carry out actions, like pin resets for Unity voicemail, to free up more time for help desk teams.

