



Helm Partners: Telecommunications & Technology Advisory

Informing Decisions. Accelerating Results.

Helm Partners is a telecommunications and technology advisory services firm helping clients achieve better outcomes across their network and communications platforms, including contact center and cybersecurity practices.

Goals:

- Identify and execute a unified corporate strategy, integrate telephony, collaboration, and enterprise contact center
- Tighten integration across business units to better support customers and drive revenue
- Reduce tech stack fragility to become more data-driven
- Achieve and maintain cost control

Challenges:

- Four (4) different business entities, with one of them (the largest among them) operating in completely separate telephony, contact center, CRM, Microsoft, and infrastructure platforms
- Strategy must be fully aligned with their other key in-flight initiatives
- CRM required re-platforming
- Quantity and complexity of data analysis

Process:

- Helm Partners executed an initial cost, service, and needs assessment to baseline the current organizational design
- Screened the provider marketplace, identifying 11 potential vendors eventually settling on 4 "best-in-breed" vendors based on client unique requirements
- Executed industry-specific cost modeling, technology demonstrations, and use case evaluations.
- Leveraged a "score carding" process that helped our client make real-time assessments of each provider based on an established set of criteria.

Results:

Client contracted with a selected UCaaS/CCaaS provider in which Helm Partners contributed insights, leverage, and guidance to forge optimal agreement language and cost structure. Helm provided operational resources to support the implementation process, curate information, and prepare documentation required to initiate and progress the project.

Client Profile:

Industry:
Full-Service
Mortgage
Company

- \$2.0b in Annual Revenue
- Licensed to Lend in 49 States
- 6,000+ Employees
- 3,500 Contact Center Agents

Leading nationwide lender that focuses on offering industry-leading products and process.

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It starts with a conversation...

HelmPartners.com