

# Financial services firm unifies widespread salesforce with managed solutions

## Technology partnership with Spectrum Enterprise makes remote operational control a reality

A need to bring together a widespread national salesforce and establish effective remote control at their headquarters were twin challenges faced by a wealth management and insurance provider as they pursued an aggressive national growth trajectory. Both were met with the help of longtime technology partner Spectrum Enterprise.

Based in New York State, the company specializes in products that help clients develop long-term financial planning around their life insurance needs. It has enjoyed significant growth in recent years, but needed to embrace new technology to meet the increasingly mobile needs of its many agents.

“We have been partnering with Spectrum Enterprise over the last six years,” says the company’s senior network administrator. “It’s been a very positive and productive relationship. So when we began looking into getting new services around fiber connectivity, voice and networking, we were very interested in exploring what Spectrum Enterprise has.”

### Network control to manage everything remotely

Insurance is a closely regulated industry. Higher levels of security and control are required. Fulfilling

those needs, while also having the ability to closely manage a busy headquarters from a home or office location anywhere in the United States, was critical to the business’s future.

“To succeed in meeting their sales objectives, they must be able to manage all their remote workers at their headquarters,” says Tiano Tedino, Enterprise Account Executive, Spectrum Enterprise. “The company’s leaders needed to be directly and instantly connected to that headquarters simply by switching on their mobile device to stay on top of everything that goes on.”

To better manage these networking and security needs via a single portal, the company opted for the reliable simplicity of [Managed Network Edge](#).

“Managed Network Edge gives us a central control module I can access and manage without leaving my home,” the senior network administrator notes. “It works even better than I hoped it would. Having the support of Spectrum Enterprise engineers and technical staff on top of that makes my life a lot easier.”

### Centralized voice service keeps mobile workforce connected

The company’s many salespeople and advisors are connecting with people across the country every day,



Employees at the financial service firm now carry their offices in their pockets, using Unified Communications with RingCentral. This cloud-based app keeps them always connected, whether at work, at home or on the go.

### Client profile

#### Company

Wealth Management and Insurance Provider

#### Industry

Financial Services

#### Services

Managed Network Edge  
Unified Communications with RingCentral  
Dedicated Fiber Internet (DFI)  
Wireless Internet

## Overview

- A wealth management and insurance provider needed reliable and scalable fiber connectivity to manage a salesforce constantly traveling around the country to engage clients and prospects.
- To centralize control of their widespread enterprise from any location, they also needed a platform that enabled remote access to their New York State headquarters.

## Outcomes

- Salespeople can transform their mobile devices into virtual offices, incorporating vital voice, video conferencing and faxing features from one app using Unified Communications with RingCentral.
- Critical bandwidth and security needs wherever staff are located get addressed by leadership from the headquarters (whether or not they are physically located there) using Managed Network Edge. This platform includes cameras and sensors for heightened security.
- With Spectrum Enterprise, the business now enjoys the advantage of 100% uptime with 24/7/365 U.S.-based support.

## Why it matters

- The company now enjoys reliable, high-speed connectivity at less than a third of the cost that was once paid to a network provider.
- The business also receives the additional benefit of free service upgrades as technology improves.
- Salespeople now have the advantage of a robust communications app better suited to their expanding needs, while also being much easier to use.
- Meeting critical regulatory compliance standards is much easier with additional safeguards in place, such as cameras and door sensors.



Security at the financial services firm headquarters can be tracked and controlled from anywhere, using Managed Network Edge. This includes a robust firewall and 24/7/365 support from Spectrum Enterprise technicians.

on the road, in their offices and at home. To do this, they need a reliable, scalable and instantly adaptable communications network not only to keep them in touch with their expanding client rosters, but also to centralize and coordinate their activities with the main office.

Spectrum Enterprise had a solution for both those needs, as well as a myriad of other purposes. Whether it be the ability to video conference, use a mobile app to transfer calls and data from an office phone or send and receive emails, [Unified Communications with RingCentral](#) is designed to help modernize workflows, simply and reliably.

At the time, the company had struggled with an outdated phone system that couldn't even scale up to accommodate additional staff or be migrated to individual homes. It was unsuited for a hybrid workforce.

Transitioning to Unified Communications with RingCentral not only streamlined communications across the enterprise, it significantly reduced infrastructure and hardware needs. The bottom line result:

A savings of more than two-thirds of what the company had been paying for its communications network before. The senior network administrator describes Unified Communications with RingCentral as “an offer we really couldn't refuse.”

Unified Communications with RingCentral provides special calling and video conferencing features suited to the unique needs of a company that incorporates multiple lines of business. Best of all, the voice service is backed by Spectrum Enterprise technicians and support staff dedicated to ensuring critical uptime is never lost to outages or service disruptions.

“Unified Communications with RingCentral makes it very, very easy for us to stay working and afloat, wherever our people may be.”

- Senior Network Administrator, Wealth Management and Insurance Provider



Working in a fast-changing market environment, employees at the financial services firm consume vast amounts of bandwidth. Having Dedicated Fiber Internet (DFI) ensures those needs are always met.

The initial installation of Unified Communications with RingCentral was so successful, the company expanded their use of the platform by adding users at a second location. The senior network administrator is particularly impressed by the simplicity of its design.

“We have seen much more efficiency in our agent calls,” he notes. “Instead of having to wait five minutes for a call to re-route through while someone waits on the line under our old system, people can now pick up their calls in under 20 seconds. And the ease of putting them in remotely was fantastic, just plug and play.”

#### Faster, more scalable connections

Answering a need to upgrade to fiber connectivity is also part of the Spectrum Enterprise partnership. Because the company is growing, and must manage more data than ever, they need scalable bandwidth and data speeds fast enough to keep pace with current and future demands, backed by the reliability of fiber connectivity.

Spectrum Enterprise installed a [Dedicated Fiber Internet \(DFI\)](#) circuit at their headquarters. Dedicated Fiber Internet is designed to be highly scalable to meet the changing bandwidth needs of a growing business. It is also designed for reliability, backed by a service-level agreement (SLA) which guarantees 100% uptime.

The installation process was planned out to be implemented within a short window of time to eliminate business disruption. This was especially important to a company where business is always moving.

“We didn’t notice any resource loss during our installation,” the senior network administrator notes. “We just kept rolling seamlessly throughout the process. It was absolutely perfect.”

**“Managed Network Edge is fantastic. Network performance issues that were once nightmares to fix can now be managed and addressed in 15 minutes.”**

- Senior Network Administrator, Wealth Management and Insurance Provider

Providing backup when needed is [Wireless Internet](#), which supplies additional bandwidth separate from the fiber circuit. “It’s a redundancy option they can call on when needed,” Tedino notes.

“We keep fairly regular hours, but in different time zones, so we need connectivity that is always there,” says the senior network administrator. “With our Spectrum Enterprise fiber and wireless solutions, that is never a problem.”

#### Protection at the hub, including cameras and sensors

A central feature of the Managed Network Edge is a firewall that, along with many other security features controlled from the same platform, protects the company 24/7/365 from the looming threat of cyberattack. The service is managed by Spectrum Enterprise technicians and can be monitored and analyzed from the portal.

“The firewall does a perfect job of keeping threats out, while the rest of the Managed Network Edge platform allows me to look in on our operation,” the senior network administrator notes. “With it, I can get in front of any potential issues by configuring the services we have.”

To improve onsite security, the portal is also connected to an array of cameras and sensors at the headquarters location.

“The Managed Network Edge cameras are important for us because we need images for compliance purposes, as well as monitoring who is going in and out of our server room,” the senior network administrator explains. “The sensors work in concert with the cameras, registering whenever



As the financial services firm unlocks more business opportunities across the country, they better appreciate the value of a scalable network. With Spectrum Enterprise, they have a technology partner suited to meet their ever-changing needs.

certain doors are being opened. We also have temperature sensors to help keep a closer eye on conditions at our headquarters site.”

### The power of partnership

Having services and solutions from Spectrum Enterprise helps the company in many ways. As a business that relies on paperwork to ensure every deal, they needed a fax tool able to transmit large documents validating compliance to regulatory overseers across the financial services industry.

“I’m very happy with the services that I’m getting right now with Spectrum Enterprise. Considering what we were paying before to our former provider, it’s not just perfect, it’s better than perfect. It’s exactly on par with what we need.”

– Senior Network Administrator, Wealth Management and Insurance Provider

When the company experienced a sudden failure with the fax system they were using, the senior network administrator suggested his colleagues switch to Unified Communications with RingCentral, which is also equipped with that function.

“We have zero issues with our faxes now,” he reports.

Spectrum Enterprise technicians and engineers have also modified their products to better suit the strict regulatory compliance needs of the company. If critical server and network issues arise, the senior network administrator knows Spectrum Enterprise team members are ready to help him solve them in a matter of minutes.

“I’m more of a server guy than a networking guy,” he explains. “Being able to contact Spectrum Enterprise, say ‘Can you take a look at this’ and have them help me immediately is a great benefit to have.”

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### About Spectrum Enterprise

Spectrum Enterprise, a part of Charter Communications, Inc., is a national provider of scalable, fiber technology solutions serving many of America’s largest businesses and communications service providers. The broad Spectrum Enterprise portfolio includes [networking and managed services solutions: Internet access, Ethernet access and networks, Voice and TV solutions](#). The Spectrum Enterprise team of experts works closely with clients to achieve greater business success by providing solutions designed to meet their evolving needs. For more information, visit [enterprise.spectrum.com](https://enterprise.spectrum.com).

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