



COUNTERPATH



Reseller Channel: Financial Services Sector

Case Study

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Financial Services Company Uses CounterPath's Bria for Branch Tellers

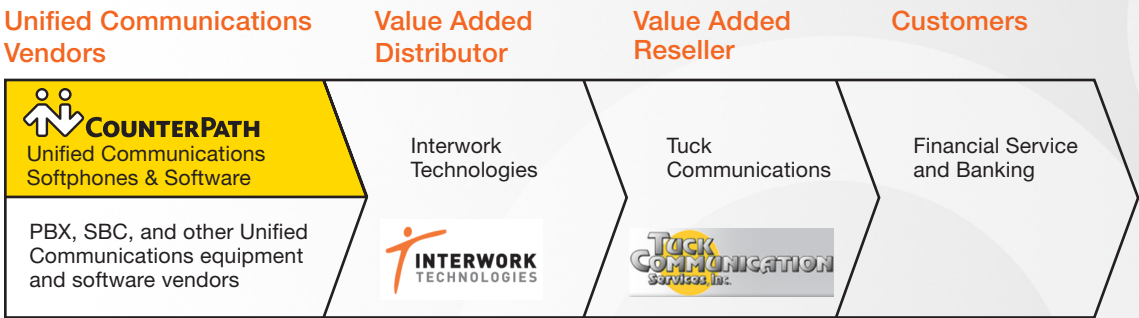
The Reseller Channel: Interwork Technologies, Tuck Communications and a Financial Services Client



CounterPath has worked closely with Value Added Distributor (VAD) partner Interwork Technologies based out of Toronto, Canada. Interwork is a leading North American distributor of security, information management and communications solutions. Interwork has over 2,000 Value Added Resellers (VARs) within their network. They assist resellers by collaborating on

opportunities where they deliver high service levels, value, and expertise.

Interwork Technologies has started to market CounterPath's Bria solution as a complement to its other communications products. CounterPath and Interwork Technologies came together with one of its resellers, Tuck Communications, to address the needs of one of Tuck Communications' financial services clients.



The Challenge

The Financial Services customer had over 40+ branches across the state of Colorado. Their mandate was to implement a new unified communications technology across all branches to:

- Improve teller efficiencies and employee productivity
- Minimize reorganizational capital expenditures
- Integrate with existing communications infrastructure
- Maintain security
- Enhance customer satisfaction

The Financial Services client needed a solution that would meet these productivity, operational, and budgetary requirements, but would not disrupt operations or impact customers.

For Interwork Technologies and CounterPath as partners, the challenge was to deliver a robust and secure UC solution to Tuck Communications, the local reseller. The solution would then be resold by Tuck Communications to the Financial Services client.

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The Solution

Together, Interwork Technologies, Tuck Communications and CounterPath collaborated to propose and deploy a Bria unified communication client solution that would meet all of the Financial Services client's requirements. Bria clients for laptops provides an easy-to-manage solution that runs on Windows, Mac and Linux laptops. It can replace the antiquated desk phones of tellers and other branch employees. Bria clients also have a reliable and easy-to-use interface and provide secure, high-quality voice communications.

Additionally, the Bria solution seamlessly ties into the Financial Services customer's existing premise-based PBX infrastructure. The Financial Services customer had the option of deploying Bria's cloud-based Unified Communications-as-a-Service (UCaaS). However because of firewall constraints, they opted for a premise-based deployment, which better suited their security and software maintenance requirements

The Key Take Away

Enterprises can deploy UC softphone clients within days, not weeks. Tellers and employees have access to PBX business features (e.g. caller ID, conferencing, busy lamp, call transfers and dial by extension). They can take these features with them anywhere in the branch where they have internet. Likewise, the IT team can remotely and securely perform Bria configuration changes and manage software updates on-the-fly through use of Bria's web portal.

For operators and channel partners, Bria offers a cost-effective business model for provisioning and managing softphone endpoints that avoids the hassle of investing in static premise-based hardware or fixed telephony devices. In the case of this Financial Services customer, their IT staff adopted a technology strategy that allows them to grow their Unified Communications program while they leverage their legacy infrastructure.

The Results and Future Opportunities

Overall, the Bria solution improved the Financial Services customer's employee communications, introduced a modern UC interface that can evolve to more services, and increased productivity while saving the business money. On average, there is a 70% savings by deploying a UC software solution.

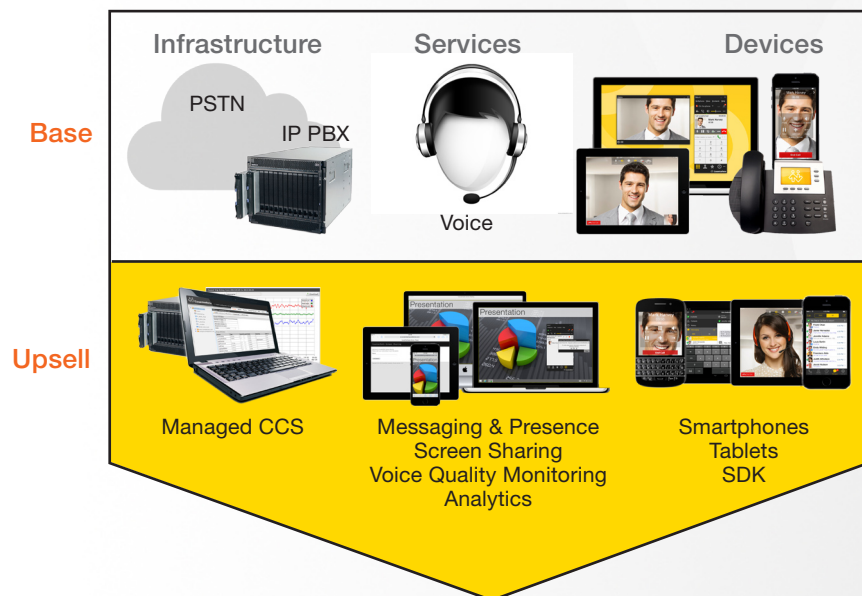
The Financial Services client's initial deployment plan was to roll out Bria software to all employees in two branches as a beta test. However, shortly after the easy and quick rollout, the IT management accelerated the rollout to all 40 remaining branches in 90 days.

The Financial Services customer found the Bria solution easily integrated with their existing PBX system. The bottom-line: Interwork Technologies and Tuck Communications saved their customer money and time by adding secure UC clients to their daily workflow business process.

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Bria Unified Communications as a Service Business Model



In this case, the customer undertook the management and provisioning of the solution. However, there is a larger and more expansive revenue opportunity for channel partners to manage Unified Communications as a Service and monetize additional elements (messaging, presence, screen sharing, voice quality monitoring and analytics). Using CounterPath's Client Configuration Server (CCS), value-added distributors and resellers can benefit from the Bria business model and generate revenue from value-added services. With a few configuration changes, operators can push and enable new Unified Communications services from the CCS. Because it is software-based, Bria has expanded to many types of devices (laptops, smartphones, tablets) and has a rich roadmap of features and services that will increase upselling and revenue.

About CounterPath

CounterPath Corporation is one of the leading UC software solutions providers, which helps businesses manage bottom-line costs by reducing CapX and operational expenses (e.g. hard phones, hosted audio/video conferencing, mobile roaming, etc.). Bria Perpetual and UCaaS offering combine the Bria suite of softphone clients for laptops, smartphones and tablets with CounterPath's cloud-hosted or premise-deployed Client Configuration Server (CCS). Using a hosted, "software as a service" or perpetual software license business model, telecommunications channel partners can easily combine or sell Bria UCaaS side-by-side with their existing IP-PBX and SBC solutions, and provide their commercial customers with a secure cost-effective system for access, monitoring, distributing and managing desktop and mobile UC endpoints, hassle free. Workforce productivity, flexibility and mobility are also greatly improved as employees are able to place or receive calls anytime and from anywhere using a variety of familiar devices and platforms.

Contact CounterPath

phone: +1.877.818.3777

email: sales@counterpath.com