



CDW and Cisco Transform Data Management for Canadian Financial Services Provider



In today's competitive landscape, seamless customer service is essential for financial services organizations who often assist customers during times of need. To enhance the customer experience, a Canadian financial services organization was seeking a new approach to address data management challenges within their contact centre infrastructure. CDW Canada (CDW) worked with Cisco to provide a solution that both improved security posture and transformed the organization's data management capabilities to deliver a seamless customer experience.

BUSINESS CHALLENGES:

Addressing Inefficiencies and Risks

- Success in the financial services industry is often dictated by customer satisfaction, so creating a positive customer experience was paramount.
- The CDW customer wanted to provide a frictionless, user-friendly and secure contact centre experience, as their existing customer support infrastructure was not meeting the expectations of their clients and organization.
- Inefficiencies in the organization support process often resulted in longer response times and impersonal communication, which was impacting customer satisfaction and retention rates. Fragmented systems needed to be integrated into a unified platform to streamline communication and data sharing across departments. Real-time data access was crucial to maintaining regulatory compliance and monitoring tools were required to help proactively address issues. To enhance risk management, the organization needed a framework that could identify, assess and mitigate risks effectively.
- The organization recognized that improving their data management required a complete technology overhaul and there was a need to make the support framework more flexible and efficient to meet the demands of the modern customer.

Transformation: Implementing Strategic Solutions

To begin, the CDW team leveraged their deep understanding of the customer's operational challenges. Having previously collaborated with the customer, CDW was well-positioned to identify pain points and strategic priorities. Through ongoing dialogue and comprehensive assessments of infrastructure, CDW developed a tailored strategy to address critical data management needs. Recognizing the urgent requirement for enhanced stability and an improved customer experience, CDW proposed a customized solution that smoothly integrated Cisco's Meraki products.



From the outset, CDW played a key role and helped guide the customer every step of the way. The first step was adding to their Meraki Networking Infrastructure by modernizing their contact centre, rearchitecting with SASE and integrating with ThousandEyes for assurance. Meraki+ allowed CDW to bring simplicity of Meraki to the rest of the technology stack.

"The opportunity to try out the solution in a lab setting is invaluable," said Andrew Faric, National Partner Business Manager at Cisco. "The customer was able to build confidence in the solution's effectiveness to move forward with full-scale implementation knowing it would meet their needs."

In tandem with allowing the customer to experience the benefits in a controlled setting, CDW began integrating Cisco's solutions into their production environment. The Cisco Webex Campaign was implemented to enable timely and personalized customer support, while advanced analytics and targeted automation allowed for the creation of more effective marketing campaigns, reducing unwanted customer communications. The deployment also included Cisco SASE to safeguard sensitive information. Additionally, CDW utilized Cisco's cloud-native application stack to provide flexibility to scale operations along with business needs.

"The core of our approach will always be tied to our customers' needs," said Puneet Duggal, Cisco Practice Lead & Principal Solutions Architect at CDW. "Cisco Meraki solutions position organizations for long-term growth while enabling them to proactively leverage technology to connect with their customers, swiftly make informed decisions and protect sensitive customer data."

RESULTS: TRANSFORMATIVE OUTCOMES

- **Enhanced Service Delivery and Retention:** Integrating Cisco Meraki solutions improved the quality of customer service delivery, empowering the organization to provide personalized, timely service that improved customer loyalty and satisfaction.
- **Increased Campaign Effectiveness and ROI:** Implementing advanced analytics and targeted automation enabled more precise client targeting and engagement, boosting the effectiveness of marketing campaigns and improving overall ROI.
- **Improved Security and Compliance:** Cisco SASE reduced the risk of data breaches and helped safeguard customer information, instilling greater confidence and trust.
- **Scalability and Flexibility:** Adopting the cloud-native applications supported rapid scaling and quicker deployment of new services, equipping the organization with the foundation needed to remain competitive in the evolving financial services industry.

After integrating Cisco's advanced solutions into their organization, the organization saw an improvement in the quality and efficiency of their customer support. Customers experienced quicker issue resolution and personalized support resulting in a noticeable increase in satisfaction. The streamlined communication and data sharing across departments also reduced delays and inconsistencies.

Overhauling the organization's contact centre required a major undertaking and by partnering with Cisco, CDW was able to deliver a tailored solution to meet their unique operational needs. Integrating Cisco's Meraki solution proved to be instrumental in transforming customer service capabilities and improving satisfaction.

Visit us [here](#) to learn more about our hybrid infrastructure offerings.

