

US Cloud Case Studies: Financial

Executive Summary

Over 30 financial institutions (commercial banks, wealth management firms, insurance companies, financial services organizations, etc.) made the switch to US Cloud for Microsoft Support in just the last year. From mid-size financial institutions to Fortune 500 mega banks, US Cloud has helped to cut costs without sacrificing staff or IT capabilities.

Case 1: Very Large European Bank

A very large commercial bank in Western Europe was reeling from rapid growth of IT support costs. Although skeptical that a US-based firm could serve their needs, they found that quality Microsoft support during their primary business hours was both available and affordable. The primary procurement leader has actually become one of US Cloud's biggest advocates.

Budget Saved: **\$560,000**

Case 2: Ultra Large US Bank

One of the largest (top-five) US banks was shocked by a 150%+ price increase when Microsoft pushed a shift to Unified. Azure adoption was driving the Unified Support pricing formula and their roadmap called for more of the same. After two years of talking with US Cloud, the bank finally made the switch in 2020.

Budget Saved: **\$1,125,000**

Case 3: Large Multi-National Investment Bank

Facing deep IT staffing cuts to offset unexpected Microsoft Support cost increases, a large investment firm in the Northeast made the switch to US Cloud. The IT staff had resigned itself to the painfully slow response times they experienced with Microsoft.

Budget Saved: **\$222,000**



US Cloud – the #1 Microsoft Support Alternative

US Cloud is the only Gartner recognized 3rd-party that offers a full replacement for Microsoft Unified Support:

- Save **30% to 50%** vs. Microsoft Unified Support
- 15-minute initial response times, guaranteed
- 100% USA engineers, MSFT-certified
- Supporting Fortune 500 and mid-sized enterprise
- Managed Microsoft escalations

Just some of our current Microsoft Premier Support
Financial Industry Clients:



Not a bank. Better. ®



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US Cloud Case Study #1: Financial

Client: Large European Bank

Industry: Financial

Annual Revenue: \$2.1 billion

Key Drivers: Cost reduction

Client Profile: A large western European Bank with over 35,000 employees, the Client maintains a complex hybrid Microsoft environment that powers their main corporate operations as well as a large number of semi-autonomous retail storefronts.

Why Leave Microsoft Support: A year or two behind Microsoft's efforts to convert US companies over to Unified, larger institutions in Europe are now feeling the pinch. Negotiating its master Microsoft EA went normally but they were shocked by an almost 200% increase under Unified Support. After briefly considering totally in-sourcing MSFT support, it became clear they could not provide the level of expertise needed across their entire Microsoft ecosystem.

Switching to US Cloud: The Bank's Procurement team was tasked with finding a viable alternative and after an international RFP it was established that only Microsoft and US Cloud could reliably support their Microsoft infrastructure. Following detailed evaluation and vetting by the Bank's IT leadership, the Client opted to take the risk of moving to a third-party and save the money on support costs.

Budget Dollars Saved

Year 1: **\$560,000**

Cost Reduction

Year 1: **51%**

Cost Avoidance

Years 2-5: **312%**

Benefit:

By saving over half a million in hard costs, the Bank was able to continue with their vital digital transformation efforts as planned. This modernization of their consumer-facing systems was seen as a strategic imperative, but not mission critical to ongoing operations. The effort would have likely been curtailed and the Bank would have fallen farther behind newer, more nimble competitors.

In addition, there had been significant dissatisfaction with responsiveness under Microsoft. There was concern that a smaller US-centric company like US Cloud would not be able to support them well in their time zone. However, a year in, IT has been extremely pleased with responsiveness and the Bank is now a regular reference client for US Cloud.

Support Example

An Unexpected Boost to Security by a New Partner

Issue: SharePoint MIA

The Bank suddenly found that none of its employee users outside their corporate offices could login and access their SharePoint site. This was critical for retail operations as the company used this as their primary information sharing and distribution system, with dozens of forms and documents critical for day-to-day retail branches.

The breakdown was causing significant disruption to their business, bringing many branches to a standstill on processing new loans, account transfers, etc.

Internal Help Desk staff had been attempting to solve the issue before the branches hit the busy lunch hour, but with no success.

"I honestly didn't think US Cloud could resolve issues for us during our regular business hours because of the time zone difference, but we needed the savings. We were pleasantly surprised at their responsiveness and have not looked back."

Jan S., CTO

Solution: A US Cloud ticket was opened and after an initial quick response and triage with a trained Crit Sit Manager, a Premier engineer was engaged within 30 minutes. After digging into recent activity with the Client it was discovered that the certificate for SharePoint servers had been updated very recently. US Cloud determined that this was most likely the cause of the problem and advised the Client to import the "SharePoint Root Authority" certificate to the Trusted Root Cert store on all SharePoint servers. The client completed that step and the log-in ability for all users was restored. Most importantly, the issue was resolved early enough in the day to avoid any significant loss of business.

US Cloud Case Study #2: Financial

Client: Ultra Large US Bank

Industry: Banking

Annual Revenue: \$23 billion

Key Drivers: Cost reduction

Client Profile: One of the top five commercial and retail banks in the US with more than 70,000 employees and \$543 billion in assets. Extremely complex hybrid Microsoft environments.

Why Leave Microsoft Support: The Client first explored alternatives after being pushed to switch to Unified Support in 2019. Even with significant SAB credits to soften the blow, the increase in year one was significant. Although the Bank came close to switching to US Cloud that year, conservative members of leadership were concerned with the risk of moving to a third-party to support critical systems. In year two, it became an imperative. After using most of their SAB credits, the second year brought another Unified Support cost increase that more than doubled their already exorbitant Microsoft Support bill.

Switching to US Cloud: The Bank's IT team had continued its discussions with US Cloud from the previous year, gaining more confidence that the company could handle their support needs. The Bank made the decision to sign with US Cloud but started their support agreement several months earlier than their Microsoft Support renewal date to overlap programs and hedge their bets on whether US Cloud would work for the Bank.

Budget Dollars Saved

Year 1: **\$1,125,000**

Cost Reduction

Year 1: **60%**

Cost Avoidance

Years 2-5: **257%**

Benefit:

The Bank worked through the initial trial period with US Cloud and were able to let their Microsoft Unified contract expire, resulting in over a million in savings for IT.

The IT and Procurement teams were recognized specifically by the C-Suite for capturing seven-figure savings without sacrificing capabilities.

US Cloud was also able to provide expert DSE's for Azure and M365 from its substantial elite MSFT Partner network.

Support Example

Azure Intune Fails to Force Updates to Devices

Issue: Azure Intune & Windows 10

The Client was attempting to set Policies for Devices Intune Managed for two phases to force Windows Updates to process. Policies were applied, but corresponding devices were not taking action.

The Client opened a ticket with US Cloud to help review the policies and learn what they may be missing in order to get the devices to process outstanding updates.

“US Cloud was great to work with throughout the sales process. They provided invaluable information to help counter misinformation being fed to our senior IT leaders by Microsoft that could have blown our cost-saving opportunity.”

David C., VP Strategic Sourcing

Solution: US Cloud researched the issue and then advised the Client that the likely problem revolved around Microsoft Teams Rooms App (MTR). MTR has built in logic for a Windows 10 feature that only allows updates (for devices running Microsoft Teams Rooms) after six months from the time when Windows makes a release update. This is accomplished by putting a special block for Microsoft Teams Rooms devices on the Windows Update for Business Channel (that is, Semi-Annual Channel) and through the app settings. During this blocked period Microsoft performs various tests both in-house and through device OEM partners to make sure that new Windows 10 feature release is working in harmony with the Microsoft Teams Rooms app and peripherals connected to it.

This is important to both ensure device security, consistent user experience and to make sure quality of experiences offered through Microsoft Teams Rooms app. The issue and cause were clarified in detail for the Client and IT was able to reset expectations regarding those delayed updates.

US Cloud Case Study #3: Financial

Client: Large Multi-National Investment Bank

Industry: Wealth Management

Annual Revenue: \$8 billion

Key Drivers: Cost reduction

Client Profile: A Northeastern US-based multinational investment bank with over 18,000 employees that had migrated a majority of key Microsoft systems to the cloud.

Why Leave Microsoft Support: This sophisticated NYC wealth management firm was being forced from Microsoft Premier Support into Unified Support. Traditionally the Client's high-caliber internal IT staff solved the majority of Microsoft break-fix tickets. Only ultra-complex issues or ones that required code or tenant access were submitted to Microsoft Support. With the "all-or-nothing" pricing of Unified Support, the Client's traditional approach of buying just the support hours they would need became impossible. Forced into the new pricing formula the Client immediately started to search for a replacement for Unified Support that more closely matched the Premier Support model they had tailored their internal resources to.

Switching to US Cloud: After searching for multiple alternatives in late 2019, the Client admitted that only US Cloud had a service capable of replacing their Microsoft Support.

Budget Dollars Saved

Year 1: **\$222,000**

Cost Reduction

Year 1: **61%**

Cost Avoidance

Years 2-5: **151%**

Benefit:

Plan B if the Bank had to stay with Microsoft was a significant layoff in the IT group. By reducing FTE headcount and leaning into Microsoft's unlimited support hours model, they could largely offset the cost increase of Unified Support. However, by doing so they have to sacrifice significant institutional knowledge and expertise specific to their environments – familiarity that would have been lost by solely relying on generic support from Microsoft.

US Cloud was able to both save enough budget that all IT staff were retained, as well as creating a "support pod" that leveraged the same engineering teams on the Bank's tickets – increasing vs. decreasing engineering resources intimately familiar with their company and systems.

Support Example

Users Seeing Double When Booking Calendar Events

Issue: O365 Outlook Calendar Glitch

Users were reporting sporadic instances of O365 Outlook calendar events doubling when entered or changed. The Client had tried to identify the commonalities in the sporadic events but was unable to pinpoint the problem.

As this was a new US Cloud Client, there had also been a previous ticket escalated to Microsoft, but no resolution had been offered in the four weeks the ticket was open. In addition, it had been over 10 days since the Client was able to get any update at all from Microsoft.

“This ticket wasn’t a major emergency, but it was a very annoying and visible issue for many users. US Cloud was able to come in and close the ticket the same day after Microsoft had done nothing on it for a month.”

William B., IT Manager

Solution: A US Cloud ticket was opened and worked that same day. This was a problem that US Cloud engineers have seen multiple times, so the Client was instructed to investigate the users and instances where the problem occurred, looking for a common thread of multi-device access.

When the Client confirmed the hypothesis, US Cloud informed the end user that typically this happens when there are multiple devices synced with the mailbox – especially if there are other delegated users for the mailboxes. The client was given instructions on how to reconfigure the problematic mailboxes / user accounts and the ticket was resolved and closed within a day of submittal.

Microsoft finally simply closed the original ticket without any update or communication with the Client a week after it had been solved.