

Nationwide tax services company reduces telecom spend by 80% with Upland Cimpl

Upland Cimpl Success Story



Manual processes and a lack of control over its telecom environment made it hard for the company to meet its annual surge in demand. Upland Cimpl provided an expert, streamlined solution.

The Challenge

Every year, when tax season rolls around, this service organization adds pop-up tax centres to provide even greater proximity to customers. The staff assigned to these temporary locations need phone, fax and other telecom services to do their job effectively. To handle the additional workload and multiple telecom change requests in the run-up to their busiest season of the year, the company was hiring a temporary telecom team to oversee more than 5,000 wireline services across the country, spanning 18 providers.

With mainly manual processes in place to order and track assets and services, this team struggled to fulfil requests in time. Once the tax season was over and the services were no longer needed, they were unable to pinpoint those that should be cancelled. The company was aware that it was paying for lines no longer in use, but could not scope the extent of the issue with accuracy.

In an effort to increase consistency in its processes, the company contracted on an ongoing basis with a managed services team. This did not, however, provide the hoped-for results, and actually exceeded their budget by 25%. After additional research, it was decided that a Telecom Expense Management (TEM) service would be the best solution for handling both day-to-day and seasonal telecom operations. Learning from the lessons of its previous experience, the company knew this service needed to be flexible enough to fit its unusual business model, as well as offer the same services in French to cover the entire market.

This Canadian arm of an international tax services company has 1100 offices across the country, serving individuals and small businesses alike.

INDUSTRY: Financial

CHALLENGES

- + 18 telecom providers with 90 invoices per month
- + Lack of internal resources
- + High telecom costs
- + Lack of visibility over wireline assets

BENEFITS

- + \$900,000 in billing discrepancies identified and resolved
- + 900 hours a year saved
- + 80% of total annual spend saved
- + 100% inventory accuracy

Upland Cimpl – automation, customization and bilingual expertise

Cimpl's services fit the bill and started showing results quickly. The Cimpl telecom experts were able to find and disconnect all unused services, and report on how services in use were assigned, giving the company full visibility over its assets.

Additionally, the team identified and resolved billing discrepancies amounting to 30% of total annual telecom spend, by combing through 90 monthly invoices from 18 providers. This was achieved through automated invoice-loading (56 invoices), complemented by manual loading of 34 invoices by the managed services team.

To better accommodate the company's needs, Cimpl introduced updates to its product, including detailed fiscal year cost reports, a feature now available to all Cimpl's customers. It also developed a customized file logic to help the tax services organization gain deeper understanding of its telecom environment.

Benefits – total control over costs, assets and processes

Cimpl's managed services team handles all day-to-day telecom expense management, supported by the Cimpl TEM platform. With 100% inventory accuracy, a clear picture of where devices are situated, and complete control over change requests and invoice reconciliation, the company no longer needs to hire contractors for its seasonal rush. It is also in a position to properly assess its telecom needs.

Before outsourcing to Cimpl, the company's telecom spend was \$3 million per year. With the help of change request automation, dispute management, automated reports and expert insight, the company has reduced telecom spend by 80% and saved 900 hours annually. With Cimpl's team constantly on top of the situation, additional savings are being made on an ongoing basis.



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with Cimpl**

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About Upland Software

Upland Software (Nasdaq: UPLD) is a leader in cloud-based enterprise work management software. Upland provides seven enterprise cloud solution suites that enable more than one million users at over 9,000 accounts to win and engage customers, automate business operations, manage projects and IT costs, and share knowledge throughout the enterprise. All of Upland's solutions are backed by a 100% customer success commitment and the UplandOne platform, which puts customers at the center of everything we do. To learn more, visit uplandsoftware.com.



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