

Redefining Financial Services Communication with a Unified, Cloud-Driven Approach

Overview

A leading investment and wealth management firm operating across multiple countries sought to modernise its communication infrastructure as part of a broader technology uplift and office relocation. With a strong focus on trust, performance, and client service, the firm required secure, reliable, and integrated communication across offices, teams, and high-value clients. Its aging on-premises phone systems lacked the flexibility and scalability needed for a hybrid workplace and could not fully support the transition to Microsoft Teams as the core collaboration platform.

Partnering with Black Box, the firm adopted a fully managed Unified Communications solution, featuring Teams Direct Routing, integrated SIP and DDI services, and advanced call centre capabilities. The pre-staged deployment enabled a seamless transition and unified communication experience across centre.

Challenges

Their legacy telephony and communication systems presented multiple challenges: an outdated on-premises phone system that had fallen out of support and lacked Microsoft Teams integration. It also created complexity around a planned office relocation where moving PBX hardware was not an option. The client required immediate, disruption-free communication capability in their new premises with visibility into call activity, agent performance, and missed interactions to meet rising customer service expectations. Additionally, they sought a scalable platform that could unify operations across multiple regions while still preserving the independence of each office. These requirements ultimately drove the need for a modern, cloud-delivered solution that aligned with their Microsoft ecosystem, enhanced visibility, and eliminated infrastructure burdens.

AT A GLANCE

CHALLENGES

- Ageing infrastructure lacked Teams integration, flexibility, and mobility
- Legacy PBX was outdated, with no interest in relocating hardware
- Physical re-location required seamless communications from Day One
- Supervisor visibility into call flows and service quality was essential

SOLUTIONS

- Teams Direct Routing with full PSTN capability, eliminating the need for handsets/softphones
- Cloud-hosted SIP & DDI platform for unified, portable number management
- Advanced analytics, ensuring real-time supervisor visibility
- Pre-staged cloud-first deployment enabled seamless continuity during office relocation

RESULTS

- Fully cloud-native, evergreen voice environment ready for future integrations
- Smooth migration with strong staff adoption and minimal disruption
- Legacy systems decommissioned in two countries with zero downtime
- Clear path for expansion with streamlined operations

BENEFITS

- Improved mobility through MS Teams native calling and remote CX Agents.
- Centralised management of users via web portal
- Enhanced oversight and compliance through analytics & call recording
- Self-service enabled which reduced dependency on vendor



Solutions

Partnering with Black Box, the firm deployed a comprehensive Unified Communications (UC) solution, enabling seamless communication and an elevated customer experience across all offices. The implementation featured Microsoft Teams Direct Routing, providing native PSTN calling within Teams without the need for additional hardware, alongside full SIP and DDI integration for flexible number management, intelligent call routing, and simplified porting.

Within the Contact Centre, Webex-based call queues and group handling were integrated to deliver efficient, enterprise-grade contact centre functionality. Advanced analytics and reporting empowered supervisors with real-time insights into call volumes, response times, and service levels, driving data-backed performance improvements.

Fully managed and preconfigured ahead of the firm's office relocation, the solution ensured a zero-disruption transition. Additionally, a Microsoft Teams certified SIP-based door intercom system was deployed in the Australian office, allowing staff to manage visitor and delivery access directly through Teams for added convenience and security.

Why Black Box?

The investment and wealth management firm partnered with Black Box for its expertise in cloud-native communication solutions and strong regional presence. The fully managed deployment was carefully planned to ensure zero downtime during the office relocation. By integrating Microsoft Teams with SIP infrastructure, direct routing, and systems like intercoms and analytics, Black Box delivered a unified, secure, and scalable communication platform. Backed by local engineering and global support, the solution provided reliability and seamless performance across all locations. This partnership has strengthened the firm's collaboration with Black Box and accelerated its modern workplace goals, enabling greater agility, innovation, and future growth.

Black Box is a global leader in digital infrastructure solutions, delivering network and system integration, managed services, and technology products to Fortune 100 and top global enterprises. With a presence across the United States, Europe, India, Asia Pacific, the Middle East, and Latin America, Black Box serves businesses across financial services, technology, healthcare, retail, public services, and manufacturing.

Result

The deployment of the MWP solution transformed the client's business operations by retiring all legacy infrastructure across both countries, eliminating hardware costs and support dependencies, and establishing a scalable, cloud-based foundation. Teams calling was adopted seamlessly with no workflow disruption, while supervisors gained real time visibility into performance and client interactions, enhancing service delivery and accountability. The solution was implemented ahead of the office relocation, ensuring uninterrupted communications from day one, and the fully integrated door access system streamlined building management by removing the need for separate apps. Collectively, the MWP solution delivered a resilient, user centric communications environment aligned with the organisation's modern workplace strategy.