



# Microsoft Teams Phone System Implementation Helps a Private Equity Firm Quickly and Efficiently Setup a Remote Work Environment Post COVID

## CASE STUDY

**Customer:** XPV Water Partners, a Toronto-based private equity firm that partners with, invests in, advises, and assists companies in growth and creating value

**Industry:** Venture Capital and Private Equity

**Profile:** The private equity firm manages over \$400 million USD of investment capital from some of the top institutional investors in North America, Europe, Middle East and Asia.

**Services:** Microsoft Teams Phones System Implementation

## Business Need

The private equity firm comprises of experienced water entrepreneurs, operators, and investment professionals dedicated towards working with companies at critical stages of their growth cycle and ensuring they always have the resources they need. To meet the collaboration needs of employees, the firm had, in an earlier engagement, partnered with Synoptek to implement a different unified communications solution.

But as the pandemic struck, the firm wanted to move to a fully-remote model, enabling work-from-home for all its employees. Given the fact that the Synoptek had previously implemented the communications solution, the private equity firm reached out to Synoptek again to enable this work-from-home environment.

Synoptek recommended implementing Microsoft Teams Phone System as the perfect solution to set up the remote environment due to its excellent remote collaboration capabilities and the lack of SIP which is usually challenging for home users.

## Synoptek's Solution and Approach

*To meet the private equity firm's telephony requirement in a time-efficient manner, Synoptek offered a range of professional services associated with the migration from the current solution to Teams Phone System. Synoptek followed its standard Teams-specific implementation methodology to address the exact needs of the client.*

As part of the engagement, Synoptek:

- Helped the firm in purchasing and assigning Phone System and implementing Microsoft Teams Direct Routing resulting in both savings and enhanced services.
- Transferred the existing phone numbers to new Teams numbers using the Teams Admin Center for configuration of Phone.
- Configured auto attendants to enable external and internal callers to locate and place or transfer calls to the right department, call queue, person, or the operator.
- Configured call queues to enable users to automatically put calls on hold, search for the next available call agent to handle the call, and enable callers who are on hold to listen to music.
- Configured numbers for services such as audio conferencing, auto attendants, and call queues.
- Enabled call forwarding that allows users to take calls from anywhere while also giving them the option of forwarding to colleagues or to voicemail.
- Evaluated the benefits of headsets vs. desk phones and selected the best hardware deployment strategy consisting of Poly's CCX Series desk phones and various Poly Headsets.

*"As a result of the sudden shelter-in-place orders caused by COVID, we found ourselves using Teams for internal communication and cell phones for external communication. Our current VoIP system was problematic given the home environments. Synoptek was able to quickly migrate us from the existing solution to Teams Phone System and really helped guide us in making the process seamless and easy."*

*Michelle Karas, XPV Water Partners Office Manager*

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## Business Results

As the pandemic struck, the private equity firm had to quickly set up a remote work environment so employees could seamlessly take up calls and attend to customers from the comfort of their homes. Partnering with Synoptek helped the firm in:

- Successfully implementing Microsoft Teams Phone System with Direct Routing
- Effectively executing a 100% work-from-home strategy
- Completely replacing an existing cloud-based telephony system with a set of features delivered from Microsoft
- Tightly integrating Microsoft Phone System features into their cloud experience.

## About Synoptek

Synoptek is a global systems integrator and managed IT services provider, offering comprehensive IT management and consultancy services to organizations worldwide. The company works in partnership with clients of all sizes – from mid-market to Fortune 100, and for over two decades, its focus has been to provide maximum business value to its clients, by enabling them to grow their businesses, manage risk and compliance, and increase their competitive position. Synoptek is committed to delivering improved business results and unmatched service to every client, every time.

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