



**Client** Global Investment Manager  
**Industry** Finance  
**Contract Type** Managed Mobility Services

**Highlights** **Total Cost Benefits \$569,111.98**  
**Reduction of ongoing mobile service costs: \$352,075.06**  
**Overcharges and refunds identified: \$65,437**

## Background

The Client is a Fortune 500 global investment management leader with more than \$400 billion in assets under management and 3,400 employees worldwide, including 9,900 employees in the United States.

The initial task was the delivery of Mobility Management Services as a Business Process Outsource, including procurement, wireless MACD, advanced helpdesk, and mobile expense management with optimization for more than 3,600 devices. The Client subsequently added wireline Telecom Expense Management with audit and cost reduction for their conferencing services.

The Client had experienced rapid expansion of mobile use in its organization and understood that it would continue to increase and require resources for support. An RFI was issued “to better understand solutions and services, to facilitate creation of a strategy for wireline and mobile devices including support and actionable recommendations to achieve both long and short-term success.”

## Approach

WidePoint set up and delivered an Expense Management Portal including receipt, audit, and allocation of all invoices, as well as extensive reporting. A perpetual invoice and mobile device / account inventory was established. WidePoint utilized its Permission Based Audit<sup>SM</sup> methodology to assure billing accuracy and find new sources of savings.

Mobile expenses were reduced using Rate Plan Optimization, which optimizes all elements of mobile expenses, including features, and ensures that all accounts conform to the Client’s mobility management policy. WidePoint also implemented a Policy & Procurement Portal to convert the Client’s mobility management policy and carrier contracts into role-based, automated workflows for procurement and MACD; manage all mobile support requests; provide end-users with personal reporting on their equipment, services, and consumption; and provide managers with the same information about their direct reports.

WidePoint also added conferencing management to our helpdesk services.

## Results

During the initial year, WidePoint managed 3,441 mobility management requests and 675 conference call tickets. Monthly mobile expense was decreased from \$190,988 at the beginning of the period to \$134,963 at the end with monthly reduction in cost that stabilized at more than \$40,000 for the second half of the period.

Cost reduction and recoveries were realized through:

- Rate Plan Optimization and Zero Usage Savings
- Wireless overbilling recovery
- Conference Call overbilling recovery
- Restructuring of conference call service subscriptions for WebEx and LiveMeeting

WidePoint also documented evidence of overcharges, including complete billing and contract documents as well as the theory of error and any necessary information to correct billing with the carriers assures our client will receive proper credit. The accuracy of refund amounts was verified as they were received as part of the quality control process.

- **Review of Past Invoices, Wireline Services:**  
To date \$63,177.83 in overcharges has been documented and recovered.
- **Review of Past Invoices, Mobile Services:**  
To date \$2,320.00 in credits has been received.
- **Reduction of Ongoing Cost, Wireline Services:**  
To date, \$151,539.09 in annual cost reductions has been recommended, implemented and realized and continue to produce savings.
- **Reduction of Ongoing Cost, Mobile Services:**  
\$352,075.06 in Optimization Savings has been realized.

### Total Cost Benefits:

	Cost Recovery	Cost Reduction
<b>Wireline</b>	\$63,177.83	\$151,539.09
<b>Mobile</b>	\$ 2,320.00	\$352,075.06
<b>Total</b>	\$65,497.83	\$503,614.15
<b>Grand Total</b>	<b>\$569,111.98</b>	