



MOMENTUM

INDUSTRY USE CASE

# Mortgage lender modernizes voice with managed Teams

By replacing legacy systems, the lender unlocked greater efficiency, scalability, and more than just cost savings



# Discover how a mortgage lender replaced legacy voice and unlocked new value

This national mortgage lender wasn't just looking to cut costs. They needed to eliminate risk, but legacy voice systems were holding back their hybrid workforce, slowing support, stretching IT thin, and racking up over \$68K in monthly spend without delivering value. By switching to Momentum, they're now saving more than \$40,000 each month, freeing up budget for more strategic IT priorities.

While this was happening, their IT team was stretched thin managing a patchwork of communication tools with no centralized control.

With a company-wide Microsoft Teams rollout on the horizon, they needed more than dial tone. They needed a fully managed Operator Connect solution that could take the weight off IT, deliver reliable customer-facing performance, and scale seamlessly with the business.

The company looked at multiple providers before landing on Momentum. Plus, the Teams-native fax solution saved time, reduced complexity, and met strict financial compliance standards without compromise.

Momentum didn't just offer a replacement and technical specs. They delivered structure, cross-functional alignment, and a fully managed Teams voice solution that relieved pressure on IT, improved customer-facing reliability, and gave the business the confidence to scale.

## HIGHLIGHTS AT A GLANCE

- **Industry:** Financial services (mortgage lending)
- **Users migrated:** 3,000+
- **Workforce:** Multi-location, hybrid environment
- **Previous monthly voice costs:** \$68,000+

## WHAT MOMENTUM DELIVERED

- Fully managed Microsoft Teams Operator Connect
- **3,000+ 1:1** user-to-call path licenses
- **50** toll-free numbers
- **1,500+** Teams SMS licenses
- **700+** Teams-native fax licenses (SharePoint/OneDrive-based, compliance-ready)
- **\$40,000/month** in cost savings

## WHY MOMENTUM

- Hands-on process
- Cross-functional alignment
- Superior support experience
- Differentiated delivery model

# Outcomes that mattered



## Improved customer experience

Every call gets through with no pooled call path limitations or missed opportunities, improving customer satisfaction.



## Offloaded IT workload

Momentum's fully managed solution gave time back to internal IT and streamlined onboarding for new users.



## Proof of partnership

Project managers and support leaders were introduced early, reinforcing Momentum's long-term commitment to customer success.



## Lowered operational risk

Faster ticket resolution and dedicated day-two support team replaced a lagging legacy provider with high costs.



## Streamlined compliance

Momentum's Teams-native fax eliminated a costly third-party tool, saved time, and ensured financial regulatory requirements were met from day one.



## Scalable value

Even at a higher monthly rate than other vendors, the solution was still more cost-effective than legacy systems and delivered more value.

## When should financial services and customer-facing organizations make the switch?

Are you in a customer-facing industry where speed, compliance, and scale matter? Then these signs may indicate it's time to rethink your voice strategy.

- Your current provider isn't meeting SLAs or resolution times
- You're preparing to scale Microsoft Teams company-wide
- You have multiple departments depending on voice but little alignment
- Your IT team is overburdened with maintenance and support
- You rely on fax or toll-free workflows that need to stay compliant
- Your missed calls directly impact revenue or customer trust



### WHAT THIS CUSTOMER HAD TO SAY

From the first call, it was clear that Momentum wasn't selling us a product: they had a process.

They listened to every department, showed us exactly how support would work after launch, and delivered a Teams solution that made our IT team's life easier while improving the customer experience. It was the most prepared and professional vendor conversation we had.

**VP, Infrastructure & Operations,  
National Mortgage Lender**

# Make the switch to a future-proof voice solution today

Start with a discovery session to learn more about your options.

## We'll help you:

- Review your current Teams and call path setup
- Explore where your environment could benefit from managed voice services
- Learn how to replace legacy tools like third-party fax with fully integrated Teams solutions
- Understand how Momentum can support your rollout: from technical deployment to long-term support



## Explore Momentum solutions

Momentum's Teams Voice solution is part of a broader suite of services designed to simplify communication and improve business outcomes. Discover how we can help you connect, collaborate, and engage in any environment.



### Teams Voice (Operator Connect)

Deploy scalable, fully managed voice services through Microsoft Teams.

**LEARN MORE >**



### SMS for Teams

Integrated messaging that keeps your business connected across platforms.

**LEARN MORE >**



### Teams Fax

Compliant, native faxing built directly into your Teams environment.

**LEARN MORE >**



### Project management & implementation support

Go from planning to post-launch with our team by your side.

## See what a better voice solution can do for your business

Ready to improve voice and cut costs like they did? We'll show you how.

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