

## CASE STUDY

# BerkOne

BerkOne saves approximately 50% in terminal emulation costs while reducing upgrade times by 80%

### Industry

Business process automation for tax collection and other financial/IT services

### Challenge

- Reduce cost of terminal emulation
- Improve overall user functionality and ease of use for critical business processes
- Streamline manual upgrade processes

### Results

- Significant cost savings of approximately 50%
- Reduced deployment times by up to 80%
- Redeployed company resources to help deliver on new customer initiatives

### Products

- Rocket® BlueZone® Terminal Emulation

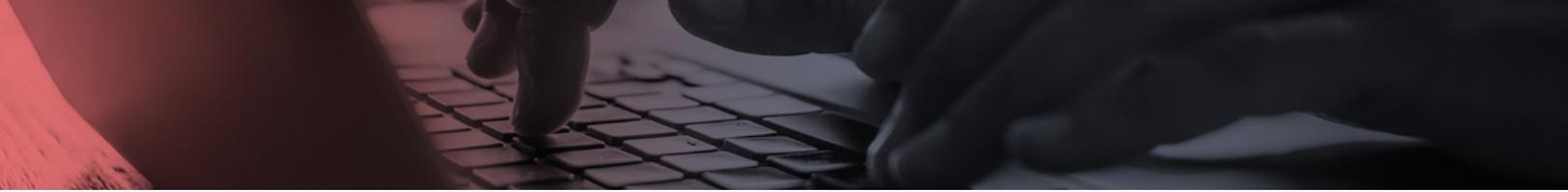
### Company

BerkOne, a leader in content and process automation solutions, partners with organizations that require the highest levels of audit and compliance in the industry. The company's technology and services focus on document capture and digitization providing searchable and actionable data with just a point and click. BerkOne began in 1936 as part of the Berkheimer tax administration organization and has worked with more than 1,000 clients. Today, as an independent company, BerkOne blends innovative spirit with vast experience and an unmatched personnel and technology infrastructure to develop highly creative solutions for today's business challenges.

### Challenge

BerkOne's philosophy is to continually look for new efficiencies to improve competitive advantage. In examining ways to more effectively support their users, BerkOne saw an opportunity to reduce the costs of its current terminal emulator by replacing it with an emulator that offered greater functionality and was easier to deploy.





Richard Smith, BerkOne's Technical Support Manager, runs a team that provides hardware, software, networks and security to all parts of the company. Some departments rely on terminal emulation for different applications and usage cases, spanning approximately 325+ users to support the following functions:

- Earned Income Tax (accessing tax records)
- Delinquent Tax (requires the most scripting, usage of macros)
- Collections (similar to delinquent)
- Collateral Management (vehicle title lookups)

As Smith began exploring different emulation products, he documented several key requirements for the winning solution: ease of installation and upgrades; flexible licensing, and a competitive price point.

Ease of deployment was critical as Smith's technicians had come to dread upgrades. Prior to deploying Rocket, the team updated every machine manually, taking hours and pulling resources away from more strategic pursuits. "Not only was this a hardship for the technical staff but end users were affected as well. We had to coordinate each upgrade at a time convenient per user. Some were performed after hours but some took valuable production hours away from staff. It wasn't an ideal scenario," notes Smith.

## Solution

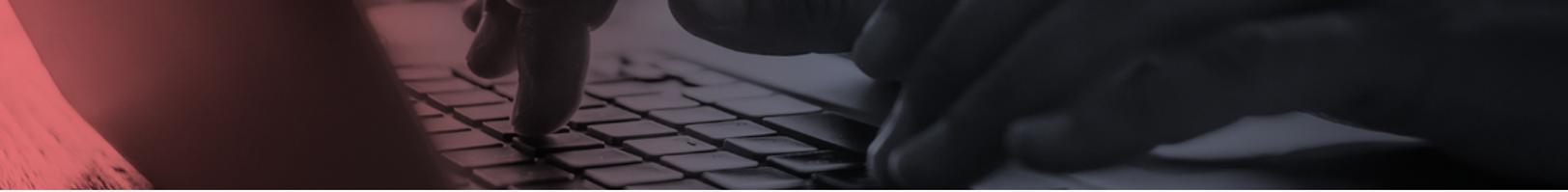
Initially, BerkOne experimented with an open source replacement solution, but after discovering that its functionality did not fully support BerkOne's requirements, Smith started to look at other vendors. A member of the support

team was familiar with Rocket Software's BlueZone Terminal Emulation from a previous company and downloaded the free trial. After putting Rocket through its paces, Smith and his team determined that Rocket provided all required functionality and security at a significantly lower price point.

The deployment took approximately five months as the team brought each department online one by one, providing training as needed. The Delinquent Tax department implementation proved to be the most challenging as users relied the most on function keys and various macros. The IT team worked with Rocket to address the macro conversion, ultimately successfully migrating all macros to BlueZone.

"Throughout the entire testing process, Rocket's support team was incredibly responsive. They willingly managed our requests for the customized requirements our specific environment demanded. We weren't sure if this level of response would continue once we were up and running but we've been pleasantly surprised. And, we've had very few tickets overall." By offering a concurrent, subscription-based license BerkOne realized an even greater cost savings than was initially anticipated.





## Results

Smith calculates BerkOne will save approximately 48% over five years vs. the cost of maintaining the incumbent solution. “The economics look favorable and we appear to be on track to achieve our pro forma cost benefit,” states Dougherty. Equally important, Smith estimates they’ve reduced upgrade times by as much as 80%. The team used to have to touch every user’s machine. With 325+ users each requiring one hour per machine, the team spent 325 hours on upgrades alone.

With Rocket, Smith’s team scripted all upgrades and one member of the support team can push out all updates to the various users in a matter of minutes. “Now, upgrades are easy,” noted Smith, “and we’ve been able to redeploy our newfound productivity on more strategic initiatives that help our customers achieve their business goals.”

Throughout the roll-out, Smith maintained constant communication with his users to ensure they didn’t see any change in functionality that could potentially disrupt day-to-day operations. Six months after the deployment, Smith went back again to the users asking for input, and received overwhelmingly positive feedback.

“I personally find it much better than the previous solution—it’s easier and faster for my staff,” stated the Manager of the BerkOne Collateral Management Department.. A Manager in the Delinquent Tax Department noted that “Rocket BlueZone Terminal Emulation has more options to personalize the fonts and colors which I really like.”

**//** *Rocket BlueZone Terminal Emulation allows our clients to successfully connect from various customized systems and we continue to receive positive feedback from those users. Rocket BlueZone reduces BerkOne’s overall support costs and frees up time for our technical resources to focus on more strategic initiatives. //*

*Kristen Dougherty  
Director of Information Technology  
BerkOne*