



Case Study

# 'It's Been a Huge Win': Zoom Helps Accounting Firm Berkowitz Pollack Brant Advisors + CPAs Simplify Management and Drive Collaboration

As one of the top 100 accounting firms in the United States, Berkowitz Pollack Brant Advisors + CPAs (BPB) has the experience and knowledge to handle a wide range of accounting cases. Specializing in wealth management, commercial real estate, forensic accounting and advisory services, BPB provides its clients with the advice and solutions they need to grow, maintain, and protect their assets and wealth.

Headquartered in Miami, Florida, BPB has nearly 300 highly accountants, business advisors and staff in five offices who are constantly working to create the best plan of action for their global clients.

## Challenge

Although BPB has been using video conferencing for more than 15 years, a collection of disparate legacy solutions weren't providing the reliability employees needed and required constant management to use effectively.

"We had tried almost all of the video systems out there," said Joe Gutierrez, chief information officer at BPB. "There were significant challenges when it came to consistency and reliability. No matter how we configured these systems, we always had trouble syncing with parties outside the organization. Our meeting rooms would also randomly act up. The solutions were pretty complex to manage, and IT was still needed to set up most of the meetings."

BPB also faced challenges with its legacy phone system. Its on-premises phone solution required significant management to maintain, and Gutierrez's team frequently required support from the phone provider.

"We were on an in-house system which we had for about 10 years," Gutierrez said. "We had more than 10 servers running the whole thing.



## Berkowitz Pollack Brant

**Founded:** 1890

**Location:** Miami, Florida

**Industry:** Financial services

**Challenges:** Unreliable legacy video conferencing, complex on-premises phone solution

**Solutions:** Zoom Meetings, Zoom Rooms, Zoom Phone

**Business benefits:** Increased video reliability, reduced on-premises infrastructure management, improved flexibility and agility

*"We had gone through the stress of supporting a video conferencing solution from the IT side. When we finally connected with Zoom, the notion of what video conferencing was transformed in the firm. When clients would try to connect with other solutions there would inevitably be issues, but with Zoom, they can connect right away. IT was also less involved in setting up the meetings, and people just took to it because it was easy to use."*

## Joe Gutierrez

CIO

**Berkowitz Pollack Brant  
Advisors + CPAs**

We had one person on our team who knew the old system, but we were still constantly reaching out to the vendor's Technical Assistance Center for support because the system was very complex. It was a very involved process to get anything done.”

## **Solution**

To simplify communication and improve collaboration between employees and offices, BPB decided it was time for a video conferencing change. After evaluating Zoom's pricing structure and reviewing the platform's hardware requirements, Gutierrez realized he could implement Zoom across the organization at a fraction of the cost of other tools.

“The cost for Zoom was significantly lower than any of the other solutions.” Gutierrez said. “The hardware costs with the other solutions were astronomically high. It was very proprietary-type hardware, and at the time we were evaluating other solutions, we had four conference rooms that were slated to get top-of-the-line equipment.

“When we started testing Zoom, we found that for the cost of outfitting those four room, we could outfit 20-plus rooms with Zoom, which was huge for us.”

Once Zoom was implemented across the organization, its ease of use and reliability led to a massive shift in the perception of video video conferencing across BPB.

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As its legacy phone system reached end of life, BPB sought to replace it with a solution that was easier to manage and provided its employees greater flexibility. After attending Zoomtopia 2018 and getting a sneak peek at the not-yet-released Zoom Phone, Gutierrez wanted to implement the solution as soon as possible.

“Once I heard that Zoom Phone was being released, I started talking to everyone I could at Zoom so that we could start testing it immediately,” Gutierrez said. “We had been using Zoom for a while at that point, and we trusted the platform. At the end of the day, it was our comfort level with the platform and its ease of use that cemented our decision to implement Zoom.”

But Gutierrez recognized, after years of working with telecommunications organizations on various projects, that migrating to a new phone solution quickly would require specialized knowledge. Gutierrez contacted Zoom's Professional Services Organization (PSO) to discuss BPB's migration to Zoom Phone.

“I decided to use Zoom's PSO team after speaking with a member of that team, Christine Graham,” Gutierrez said. “She comes from the telecommunications world and knows everything about it. She was so confident in her abilities and the abilities of her team, and the cost of their services was very reasonable based on how critical phone systems are to our business.”

With Zoom's PSO team at his side, BPB was able to overcome some internal hurdles and implement Zoom Phone quickly.

“We came across a significant porting issue on our end during the implementation, and Christine was able to identify it and promised that she would help in any way she could,” Gutierrez said. “Even though the PSO team and Zoom's porting experts were forced to port over everything manually, they were still able to port over all of our numbers in a single day.”



With the ability to manage the cloud solution from the Zoom Portal, administering Zoom Phone and maintaining BPB's communications infrastructure was significantly easier. Employees at BPB also gained more flexibility with the Zoom Phone mobile app.

"We rolled out Zoom Phone on the softphones and the cell phones simultaneously so they could use it anywhere," Gutierrez said. "For some people, the fact that they can have their business line forward to their cell phone has been earth-shattering. They don't have to expose their personal cell phones anymore, which has been greatly appreciated."

## Results

With Zoom's unified communications platform, BPB simplified the management of its communications infrastructure while reducing costs and improving collaboration. BPB was also able to leverage Zoom Meetings to dramatically improve communication, both internally and externally.

"The biggest impact we've seen here at BPB is the ability to connect face-to-face in a simple, easy-to-use manner that works," Gutierrez said. "Connecting people and getting things done instantaneously over video has been a huge win."

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Zoom helps businesses and organizations bring their teams together in a frictionless cloud environment to get more done. Our easy, reliable, video- first unified communications platform for video, voice, content sharing, and chat runs across mobile devices, desktops, telephones, and room systems. Founded in 2011, Zoom is a publicly traded company on Nasdaq (ticker: ZM) and headquartered in San Jose, California.

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