



Building a modern digital workplace

How a financial services startup is powering its meteoric growth with Dialpad



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"Dialpad has transformed how we manage users and power conversations."

— Mike Bongardino, Tech Ops Manager at Betterment

Betterment is the intersection of investing and technology. A fast-growing financial services startup, Betterment has built a platform that replaces confusion with delight, and uncertainty with control. The company provides customers with a smarter way to invest, and helps them invest billions of dollars to achieve their retirement goals.

THE CHALLENGES

- Rapid Employee Growth
- Platform Scalability
- Archaic Phone Lines
- Intensive IT Administration

A Fast-Moving Startup

In less than a year, Betterment has matured into a fast-growing small business—and continues to accelerate.

By the end of 2016, the company plans to double its workforce. Mike Bongardino, Betterment's Tech Ops Manager, joined right at the cusp of the startup's growth spurt. "Six months ago, we were at about 100 people, and we've now grown to 148," explained Mike.

As a lean, one-man IT team, Mike needed a communications platform that could grow alongside Betterment and stretch to fit the needs of its mobile workforce.

Within months of onboarding, he replaced the startup's aging telephony network with Dialpad.





"Originally, we had one phone line that rang a bunch of desk phones. But we lacked the enterprise-level features necessary for a company scaling so quickly," he explained.

In order to create a more robust IT experience, Mike established a pure cloud communications network.

"The old phone system was a source of headache for our IT department. Dialpad has completely transformed how we manage users and power conversations."

Betterment can now connect employees across their favorite devices, while supporting voice, video, and messaging—all in one place.



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Nobody wants a clunky phone
on their desk. Dialpad has
been a perfect fit for the way
our employees work today.

Mike Bongardino
Tech Ops Manager at Betterment

Shifting to a Pure Cloud IT Stack

Prior to Dialpad, Betterment's workforce was connected via a complex network of desk phones. But IT understood that in today's workplace, people no longer need phones that collect dust on their desks.

"We didn't want to be stuck in this archaic loop, where our phones can't follow us anywhere," said Mike.

Instead of managing parallel systems that are unaware of each other, IT focused on deploying integrated cloud services.

"Dialpad has been a perfect fit for the way our employees work today," explained Mike.





The platform's pure cloud architecture means employees can call, chat, or text across any device—laptop, smartphone, or tablet.

All communication channels are tied to a single number. And with just one tap, live calls can be transferred between devices.

With Dialpad, Betterment has created a seamless digital experience for its workforce.

"Our entire communications infrastructure is independent of this building. Dialpad gives me the freedom to manage users from anywhere in the world," said Mike.

Deployment Over a Cup of Coffee

Betterment's deployment process consisted of a single onboarding email from IT. "Our roll-out didn't require traditional hand-holding. It was just fire and forget," explained Mike.

Now, departments can train and provision users in minutes—without IT support.

For easy access, employees can also log in to Diapad using their Google Apps credentials.

By deeply linking Betterment's productivity suite with its communications platform, IT is able to transfer real-time data across the two applications.





Connecting Everyone, From Anywhere

Dialpad's convenient, work from anywhere design has inspired company-wide engagement. Teams can now customize how they communicate based off unique department needs.

Betterment's sales team mainly uses the mobile app, taking customer calls on the go and launching demos from anywhere. Recruiting relies heavily on Dialpad's desktop app to seek out prospects. When traveling, executives use the platform to switch live calls between desktops and smartphones.

Across the company, Dialpad is helping Betterment forge deeper, more productive relationships with customers and employees.



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Our employees love using
Dialpad to communicate
in the style that works
best for them.

Mike Bongardino
Tech Ops Manager at Betterment

Deeper Insight into Employee Productivity

Dialpad's Analytics feature has also added a layer of transparency to the startup's telephony usage.

"Analytics helps validate the already low cost of Dialpad, while providing valuable insight on our users and teams," explained Mike.

Dialpad admins can instantly access granular usage data by person, department, or location. Users can also track their individual productivity patterns.

These simple, visual reports make it easy for Betterment to precisely evaluate company-wide engagement.





Eliminating IT Waste

Using Dialpad, Betterment is addressing its communications challenges at a much larger scale, and with a massive reduction in IT waste.

"Our previous telephony bill was absurd. It was over \$1,200 a month for a service that we were barely utilizing," said Mike.

Now, Betterment is seeing 47% in cost savings, and also achieving far more for its spend.

"From a customer service standpoint and a cost perspective, moving to Dialpad has been an extremely successful experience for Betterment," said Mike.

"The work-from-anywhere mindset has changed our office culture for good."

— Mike Bongardino, Tech Ops Manager at Betterment

To address scale and flexibility, nimble startups like Betterment are turning to the cloud for core services like telephony. The modern workplace is no longer dependent on archaic, legacy hardware—its IT infrastructure is pure cloud.

THE RESULTS

- 47% in Cost Savings
- Scalable User Onboarding
- Intuitive IT Administration
- A Mobile-First Workplace

GET STARTED TODAY

Dialpad for Startups
Connect Everyone. Work Anywhere.



Dialpad™

Dialpad is communications for the modern workplace, delivering an experience that employees and administrators love. Available on any device, anywhere, Dialpad includes voice, video, group messaging, SMS, MMS, mobile VoIP, conferencing, screen sharing, document sharing, and integrations with Microsoft Office 365 and Google Apps for Work. A pure cloud solution, Dialpad enables a new office communications system to be completely up and running in a matter of minutes. [Learn more](#)



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