



## CASE STUDY - MANAGED SERVICES

# BCBSNC Credit Union

### EXECUTIVE SUMMARY

In 2003, **BCBSNC Credit Union** was a seven million dollar credit union that faced the challenge of expanding its services at the same time it lost IT support and infrastructure from its sponsoring organization, BCBSNC.

**Computer Service Partners** assisted BCBSNC CU in building a new network and began providing day-to-day IT support for their operations.

Since 2003, CSP has been monitoring BCBSNC CU's network 24x7, performing routine preventative maintenance, system upgrades, and proactively managing the company's servers and back-ups.

Through its Virtual CIO offering, CSP also helps the organization develop a strategic IT roadmap for future growth.

With **CSP Managed Services**, BCBSNC Credit Union has been able to:

- Rely on CSP for vital day-to-day IT support
- Gain peace of mind
- Avoid network and security issues
- Develop an IT Strategic Plan

## THE BACKGROUND

Today, BCBSNC Credit Union is a twelve million dollar credit union that serves the banking and financial needs of BlueCross BlueShield of North Carolina employees and their families. Its mission is to provide an alternative to other financial institutions for cost effective, secure, and convenient financial services to their members on a cooperative basis.

In 2003, as part of a long-term growth strategy, the credit union was looking to expand services from traditional branch banking and offer more on-line banking services.

In addition, they wanted to build a system that would allow access to typical branch office services in other BCBSNC locations, as well as enable future branch offices to come on-line easily and seamlessly.

"As we prepared to develop our on-line banking service, the decision was made by BCBSNC and our insurance company that we should develop our own separate local area network, or LAN," said Laura Williams, CEO of BCBSNC CU.

"Although we have the BCBS name in our title, and we're located within BCBS facilities, we are actually an independent company, with a relatively small office," said Williams. "That means we have the same types of budget restraints and business considerations of other similarly sized companies."

"When the decision was made to develop and maintain our own separate LAN, it meant we would be losing some of the IT support that BCBSNC had provided in years past. As a small company, this was a significant shift."

## THE DECISION

"With our on-line banking project, I was extremely concerned about security," Williams said, "so we started looking for a vendor that could guide us through this project and provide the security expertise we needed."

"But, we had some unusual constraints on vendor selection as BCBSNC has strict rules about which vendors can enter the building and gain access to electrical and networking closets."

"Back then, there weren't many other vendors in the area offering the breadth and depth of service that CSP offers. Plus, CSP already had a trusted and established relationship with BCBSNC, and that carried a lot of weight. When we added up all those factors, CSP was a natural choice for us."

"When we first met with CSP, I wasn't specifically looking for Managed Services, I was looking for a vendor to help with our Internet banking project. But, then my sales rep told me about a new service that CSP was just beginning to offer. After he described what was included and covered by Managed Services, my reaction was: *I want that.*"

"So, we initially approached CSP in 2003 with a project request, but we immediately signed up for Managed Services. We've been a Managed Services customer — without interruption — ever since."

## THE OUTCOME

"CSP has been our IT department for 8 years now. What they provide is vital to our day-to-day operations. They help us keep things running and avoid problems before they happen. Without them, we'd either have to hire someone internally, or we'd have to find a replacement vendor."

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—Laura Williams, CEO  
*BCBSNC Credit Union*

“I don’t have exact figures as to how much it would cost if we had to hire an IT staff member to replace all the skills that CSP offers, but I’m confident that we’d be talking about a lot of money.”

“For us, it’s more than just cost savings. Our staff is small and so is our office. If we were to try and bring these skills in-house, we wouldn’t even have a place for an IT person to sit.”

“Beyond our space limitations, we also don’t have enough steady issues to justify a full-time IT hire. Most of the time the system runs fine...but when it doesn’t, I’m glad we can call CSP.”

“I have other friends who are in management, in various industries, and they have hired ‘some guy’, by the hour, on an as-needed basis. They trust this ‘guy’ with their entire system – and it seems to work for them.”

“But, I can’t see us relying on just one person. What if he wasn’t available when we needed him? What if he was on vacation? I sleep well at night knowing that CSP is monitoring our systems.”

“I also really appreciate being able to brainstorm or explore ideas with my CSP contact.”

“Through CSP’s Virtual CIO program, I know I can call my contact and work through the pros and cons of new solutions as they come on the market. I can throw out ideas and CSP will tell me what it means and whether it’s a good idea for us to pursue.”

“For example, lately we’ve been hearing a lot about virtualization. It’s nice to be able to call my Virtual CIO and talk about this technology within the context of our overall

business goals. He understands what we’re doing and where we’re trying to go in the future. And he helps us evaluate how strategies like virtualization fit into our overall IT roadmap.”

“I meet with my Virtual CIO quarterly. In those meetings, he provides reports that show how our system has been functioning over the quarter and how our backup system has performed. We talk about any outstanding issues we’ve had over the previous quarter and then we get focused on new issues and ideas. It’s just a routine thing, but I really appreciate it.”

“In addition to day-to-day network and security monitoring, CSP has also helped us with equipment replacement and a disaster recovery plan.”

“It’s just really nice that they know how to manage all this rapidly-changing technology and I don’t have to think about it. I know enough IT terminology to be dangerous. However, I also know enough to recognize when we have an issue that we can’t handle. That’s when I call CSP.”

When asked what she appreciates the most about CSP Managed Services, Williams said, “Crashes & breaches. That’s what scares me the most. And I’m happy to report that since 2003, with CSP’s help, we haven’t had any major crises.”



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revision 1.0 / 08.11