



CASESTUDY



How Centerpoint IT Helped **Unify CRM** Cut Cloud Costs By 40%

Unify CRM, a mortgage CRM software provider, needed to optimize its complex legacy cloud infrastructure to enhance efficiency and reduce costs. Lacking the in-house cloud architecture expertise, they turned to Centerpoint IT for guidance.

Centerpoint streamlined Unify CRM's architecture, reduced AWS costs by over 40%, and simplified user management, all within a 30-day period. This collaboration not only resulted in significant cost savings but also freed Unify CRM's development team to focus on building valuable software, setting the stage for future growth and improved cloud management.



Who is Unify CRM?

www.unifycrm.com

Unify CRM is a specialized mortgage Customer Relationship Management (CRM) software provider focused on streamlining and enhancing mortgage processes for businesses. They offer tailored solutions to help mortgage companies manage their operations more effectively.

As a growing company, Unify CRM recognized the importance of optimizing their cloud infrastructure to support their expanding needs. Efficient cloud services play a critical role in Unify CRM's success, allowing them to maintain streamlined operations and provide reliable services to their clients.



Why Did Unify CRM Need Centerpoint IT's Help?

Unify CRM faced the challenge of managing a legacy cloud infrastructure that had become increasingly complex over time. While their development team was adept at software development, they were not cloud architects. This gap in expertise made it difficult to optimize their systems fully.

Jeff Grubb, Director, Product and Development, explains, “We needed guidance to implement the right changes and overcome those challenges.”

Their existing cloud environment required a level of architectural adjustment that was beyond their internal team’s capabilities. Although they were already using cloud services, they needed assistance to simplify their infrastructure, improve efficiency, and reduce costs.

“It wasn't so much about IT pain points; it was more about bridging the gap in our team's skill set,” , says Jeff. ***“Our developers are not cloud architects.”***

This is a common scenario for many companies like Unify CRM, where the focus is on developing and enhancing their core software rather than on managing cloud infrastructure. It's not feasible or necessary for every company to have in-house cloud architecture expertise.

In fact, relying on external experts like Centerpoint IT allows companies to tap into specialized knowledge without diverting resources away from their primary business objectives. This approach enables teams to stay focused on their strengths, such as building and improving their software products, while leaving the complexities of cloud management to those who specialize in it.

Recognizing the need for expert help, Unify CRM turned to Centerpoint IT for guidance. Centerpoint IT came as a referral from Unify CRM's owners, who had previously worked with them in other businesses.



What Did Centerpoint IT Do for Unify CRM?

Centerpoint IT conducted an assessment of Unify CRM's cloud environment and identified key areas for improvement. We focused on flattening the architecture, reducing complex user domains, and migrating the active directory to a locally managed setup to simplify user management. These changes enhanced access control across Unify CRM's system and streamlined their cloud infrastructure.

Centerpoint IT simplified our architecture and reduced complex user domains," , says Jeff. "In the cloud, we now have a locally managed active directory, which has made user management much more straightforward."

One of the most significant achievements was the comprehensive optimization of Unify CRM's AWS environment. This strategic overhaul resulted in a substantial reduction in their monthly cloud costs, freeing up resources for other critical business areas.

"We reduced our AWS spend by just over 40%," , says Jeff. "Centerpoint quickly identified areas where we could realize immediate ROI."

The adjustments made by Centerpoint were both practical and highly effective. We made it possible for Unify CRM to transition to a more efficient cloud infrastructure seamlessly, all without the need for any major software changes.





The Impact: 40% Cost Reduction and Streamlined Operations for Unify CRM

Centerpoint IT's expert assistance resulted in several immediate benefits for Unify CRM. Firstly, they achieved a 40% reduction in their AWS spending, a cost-saving measure that would continue to yield returns over time. Secondly, by simplifying their architecture and implementing better strategies, Unify CRM's development team could focus more on writing valuable software rather than being bogged down by cloud management issues.

"We now spend less time worrying about how things work and more time building valuable software", says Jeff.

The adjustments were implemented swiftly, taking around 30 days from the initial assessment to execution. This rapid timeline allowed Unify CRM to see immediate results and enabled their team to continue focusing on product development.

Transforming Unify CRM: Simplified Cloud Management and Lasting Efficiency

The enhancements made by Centerpoint IT not only resulted in immediate cost savings but also laid the groundwork for future improvements in Unify CRM's cloud infrastructure. The architecture became more streamlined, decoupled from their software, and easier to manage. This transformation enabled Unify CRM to reduce maintenance efforts and focus on delivering high-quality software to its clients.

"We just needed guidance from experts, and it really didn't take much effort", says Jeff.

Grubb emphasized the importance of seeking expert assistance, noting that starting the conversation was the hardest part. With Centerpoint's help, Unify CRM overcame their hesitations and successfully optimized their cloud environment.

"You never know what you're going to find out, and it might be faster than you think", said Grubb.

Through the collaboration with Centerpoint IT, Unify CRM gained a more efficient and cost-effective cloud infrastructure, enabling them to focus on their core business and future growth.