



## Case Study

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Freedom Financial  
Network



# A digital transformation strategy for financial services with Immedia Integrated Technologies and Kloudspot

## Overview

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It's no secret: employees who feel safe, informed, and happy at work deliver better results and enjoy a richer level of job satisfaction. So, when Freedom Financial CIO Mark Tonnesen saw that their employee satisfaction scores were decreasing, he knew that it was time for a change – a true transformation of the business.

With over 2,400 employees across offices in California and Arizona, such a transformation wasn't going to be easy. But if anyone could help make it happen, it would be Tonnesen. A technology thought leader and operations executive who has created and launched multiple new business models during the course of his career. Tonnesen knew that a successful transformation strategy needed a technology-driven solution that could use data to bridge the physical work experience and help inform decisions to produce better planned facilities and happier, more productive employees.

### The chosen solution would need to resolve three main challenges:

- Improve internal communications across the employee ecosystem
- Drive expense control and facility planning by understanding space utilization
- Provide employees with a better sense of physical security on premise

A solution that answered all of these imperatives did not currently exist, so Tonnesen partnered with local technology services provider, Immedia Integrated Technologies in Scottsdale, AZ, to develop a custom, integrated solution built on the Kloudspot Situational Awareness and Intelligence Platform.

## Addressing the three challenges

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“Early on,” said Tonnesen, “We especially liked Kloudspot’s accuracy of location information, along with the footfall and time-of-day analysis, GPS, positioning of people & vendors, security-related data, the ability to create and adjust business rules, the robustness of the analytics engine, and the large amount of analytics that can be gleaned from the system. And we appreciated their responsiveness.” Mark continued, “This was precisely the core technology and company we needed for gaining data insights to solve our multiple challenges.”

The core implementation team included three Immedia technicians and a Kloudspot engineer, collaborating with two primary people from FFN, an infrastructure and a content specialist. Tonnesen also was personally involved with general guidance and testing of the system as it was being installed. He observed, “We were pleased with the expertise and responsiveness we received at every step from Immedia’s technicians and Kloudspot’s engineers.”

## **Improving internal communications across employees and ecosystem partners**

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The first challenge that FFN needed to overcome was on the internal communications front. Tonnesen knew that in today’s world of connected devices, digital displays, and great graphics, relying on email communications alone was outdated – especially when expectations for variety, choice, and high-quality communication experiences had become table-stakes in most organizations. Furthermore, the lack of quality, timely communications across the company’s employees, customers, vendors, maintenance personnel, and other stakeholders was a key reason employee engagement had declined.

Tonnesen sought a solution to control and deliver prompt, customized messaging that brought together data from disparate sources and combined it with rich, engaging graphics. The content would need to be easily or automatically staged and scheduled, and targeted to segmented, wide-ranging audiences throughout their enterprise. Delivery also needed to be considered as the resulting messaging needed to work across multiple personal devices and be able to be displayed in various environments, including lobbies, open areas, conference rooms, and customer and executive areas. Email, of course, would also need to be included.

Implementation began by deploying 70 displays across the company, using a combination of new Kloudspot displays and existing repurposed ones. Using information captured from their CRM system, the team was able to run important messaging and real-time sales leaderboards in customized graphical format throughout the company’s widespread geographic locations. “It’s really inspiring to see what full transparency and visibility does to employees... watching sales numbers grow, watching big deals come in. It really gets employees pumped,” said Tonnesen.

Kloudspot is now enhancing FFN’s business intelligence as a whole, empowering a wide range of data-driven decisions and countless communications on a daily basis. By improving the content and tying all their communications activities together, they are proactively meeting the needs of their employee ecosystem to be more centrally connected to the company as a whole.

## **Creating a better physical workspace for employees**

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Next on the list was using technology to create a better physical workspace for the 2,400 employees spread across FFN’s six buildings. Each building had spaces for customer service agents, engineers, operations and management, and included numerous configurations of conference rooms, open air spaces, and work environments. But whether or not these spaces were being used effectively was unclear.

When it came to decision-making and space planning for future facilities, Tonnesen wanted to understand the how's of various areas in the building – how they were being used, how often, for how long, and for how many people. He said, “Our company had not long before invested \$40M in two new buildings in the Tempe area. But now we were already approaching 90% capacity in these buildings, and even more filled company-wide. As we began to consider a major investment in yet another new building, we came to realize we were doing so without the necessary data and space allocation insights to make the best, informed decisions.”

Thus, company leaders sought a way to gather and analyze building/campus occupancy and traffic information, with the resulting analytics and insights being easily accessible and actionable.

To achieve this, FFN utilized and built on the analytics and extensions that Kloudspot provides with its AI and machine learning. Within weeks they saw that the system and the company could learn many details about its environment: they could see location information, GPS information, conference room density, and more – all for ongoing reference. They learned many building usage insights and started realizing that much more could be obtained.

With better understanding of the actual and optimal uses of all their environments, FFN is now adapting areas for best usage of all the floors and spaces in each building. For example, they've been able to discern and accommodate different activities and usage patterns by their engineers, alongside how management and customer service agents operate.

## **Providing employees with a better sense of physical security on premise**

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With other insights and results coming in quickly, FFN's interest shifted to looking at Kloudspot as a potential security solution, too. What was going on in the parking garages? Were people there safe at night? What weekend activities were they seeing take place?

They had an existing video camera system controlling the outer parking perimeter that they were quickly able to tie into Kloudspot. From here, they were able to use the security data they were now seeing to determine the triggers and resulting notifications they would want sending out.

The first six months taught FNN a lot, giving them the confidence to expand their use of Kloudspot's Situational Awareness and Intelligence Platform to implement additional capabilities. Maintaining and using the Kloudspot system only requires staffing by two FFN people as a portion of their regular job roles. One person handles audio-visual aspects such as analytics, determining rules, and communication outputs, while the other takes care of infrastructure, including controlling where the data goes and making sure it's secure, so trying new things is easy and requires minimal investment upfront.

## **Benefits and impacts**

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With Kloudspot integration, FFN has seen results in-line with, or exceeding, their original objectives. Communications to stakeholders have clearly expanded and improved. And with a better understanding and use of their space, they have also improved their facility and safety-related decision making.

Recently, they've discovered new ways to gain and communicate insights that hadn't even been considered previously. With Kloudspot's solutions, they've been able to enhance FNN's business intelligence as a whole, empowering a wide range of data-driven decisions.

I don't spend much with Kloudspot on an annual basis, but it is becoming obvious we'll save 3-4X that amount each year

– **Mark Tonnesen, CIO, Freedom Financial Network**

By improving their content and tying all their communications activities together, FFN is now proactively meeting needs of their employees and ecosystem. Constituents are more centrally connected to the company as a whole, as reflected in the company's Employee Engagement scores, which have increased from 69.4% to 82.2% between 2019 and 2020 – a 13% Y/Y improvement. They've also saved \$20M in facilities, with Mark adding, "our biggest discovery was not actually needing the expensive next new building we had been contemplating! That was major!"

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**13%**

Increase in employee  
engagement scores

**+20M**

Savings in  
facility expenses

**3X**

Amount saved  
each year

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Digitally transforming their business in this data-driven way is changing employee, management and customer conversations – and ultimately satisfaction – at Freedom Financial Network. Their team is now better equipped to articulate the specific value that integrating IT with location awareness delivers at every level – to employees, customers, and business operations

– **Guillermo Diaz, CEO, Kloudspot**

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Moreover, this solution is saving the company from new software expenses. Though not necessarily diminishing existing costs, it is resulting in savings by removing the need to buy other items like dedicated point solutions, and avoiding the additional costs associated with supporting these new undertakings.

With FFN's situational awareness and confidence growing, they plan to lean-in further with Kloudspot's continually evolving features. They'll be ensuring all their support, service, and operations teams are using the insights from the solution, applying them across the business.

## **COVID-19 readiness and returning to offices**

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As FFN – and the world as a whole – prepare to return to more on-premises work, the company has been readying for compliance with evolving health and safety directives – enabling the business to proceed as smoothly as possible. FFN has not only expanded physical signage and made new messaging available, but they'll also be implementing control points to react quickly to fluid situations.

Having already marked out floor spaces with proper social distancing throughout their buildings, the company's next move use Kloudspot's Platform to execute space calculations for every location in every building across the company. When health-related people-spacing limitations are in place for different areas, they'll have alarms go off locally (or signs will appear, and notifications will be sent) when too many people are in an area or too little spacing is taking place. And if someone tests positive for Covid-19, they'll do a complete trace back of who they've been in contact with in the building over a certain period of time. Mark believes, "We'll be able to react and respond quickly should certain situations arise. With Kloudspot in place we can iterate, acting quickly and responsibly as needed."

## **This is only the beginning**

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Long term, Tonnesen believes, "the biggest opportunity for which we feel we're only scratching the surface is on the security side – the overall security of our premises. Likewise, we're considering ways we can use Kloudspot as a marketing tool for our business. When we have executives coming to our locations or when we host events, we want to be able to interactively deliver the right level of content that is germane to that audience."

The leaders at Freedom Financial Network are also seeing the benefits of the solution and believe that this is just the beginning. As they experience first-hand how the digital revolution is transforming their business operations, it positively impacts how they manage and articulate the value of their assets – including people, facilities and technology.

Kloudspot technology has enabled positive business impact much more readily than similar solutions of the past. Whether it's better understanding what's going on in their environment, or what they can be doing to make colleagues happier, Kloudspot has given FFN confidence that, moving forward, they will have access to greater insights.

They credit Kloudspot as a key business partner who clearly contributes to their employees feeling safe, informed, and happy at work. Importantly, Kloudspot's Platform can scale to keep meeting the demands of their enterprise, now and for years to come.

## **About Kloudspot**

Founded in 2016, the Kloudspot Situational Awareness and Intelligence platform uses data collected from Bluetooth, Wi-Fi, environmental sensors and connected cameras, married with AI, to convert physical actions and movements of people and devices into digitally treatable data.

Organizations can then leverage actionable insights to deliver compelling digital engagements to enhance a variety of experiences for their constituents across health and safety, lifestyle, and workspace and education.

For further details or to schedule a demo write to

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