

Convera sees 2x employee engagement and improved productivity with Zoom’s AI-powered platform



Convera created a seamless, single-platform communications experience to improve employee engagement and collaboration.

convera

INDUSTRY: Financial services

COMPANY SIZE: 2,000 employees

CHALLENGE: Enabling a global workforce, providing a secure solution for fintech services

SOLUTIONS: Zoom AI Companion, Workvivo, Zoom Meetings, Zoom Phone, Zoom Team Chat, Zoom Rooms, Zoom Webinars, Zoom Events, Zoom Contact Center

BENEFITS: Seamless single-platform experience; 2x increase in employee engagement due to tight integration with Workvivo, Convera’s employee engagement solution; more effective collaboration powered by AI Companion and Team Chat

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CHRIS BLACKSTONE,
Director of digital workplace

Convera helps organizations of all sizes, from small businesses to educational institutions to large enterprises, move money around the world. With over 2,000 employees serving over 30,000 customers globally, communication at Convera needs to be reliable, secure, and simple. And when Chris Blackstone, director of digital workplace, and his team were presented with a unique greenfield opportunity in 2022, simplicity was one of the reasons they chose Zoom.

“When it comes to technology in the workplace, it can become quite a complex maze of solutions for people to navigate,” Chris said. “We decided to provide a single application, a single platform for people to use for phone, meetings, and digital collaboration.”

From phone to platform-wide adoption

It’s rare to have the opportunity to start from scratch, but that’s exactly what Chris and his team were faced with. “We were able to bring Zoom in on the ground floor with very little legacy or baggage,” he said.

The decision was largely based on **Zoom Phone**. “We were able to choose Zoom Phone as the foundation of what it looked like for Zoom to be embedded at Convera, and from there we’ve really been able to expand and take advantage of all the new features that Zoom is offering,” Chris said. “We made the right decision from the start.”

Over the span of less than two years, Convera expanded its use of the platform beyond Zoom Phone and Meetings to Team Chat, Webinars, Events, and Contact Center. Moving to Zoom One licensing has helped them unlock access to more core Zoom features, including AI Companion, which Chris says has been met with enthusiasm.

He credits close partnerships with Convera's security team for being able to roll out solutions like AI Companion so quickly.

"We want to make sure that the collaboration solutions we are using are completely compliant within all the guardrails and expectations that our security group has," Chris said. "We had conversations and made sure that we could point them to Zoom resources and Zoom employees to answer their questions. Zoom's clear leadership in not training their AI models on any customer data really helped in that process."

As a company in the fintech space, security and compliance are critical to Convera's operations. The team implemented Zoom **customer managed key** to manage the encryption keys for all of Convera's content in the Zoom platform. "That was huge for us and a really important step to demonstrate how significantly we take security," Chris said.

"It's the first technology where people are clamoring for a way to make their meetings more effective, to make them more robust, to make the after-meeting experience even better. The Zoom One license gives us the opportunity to use those AI features in ways other solutions simply don't allow."

CHRIS BLACKSTONE,
Director of digital workplace

"When we went to Zoom One licensing, the first thing we did was implement customer managed key. That brings a level of relief to me knowing we have that control in ways that other companies don't."

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Director of digital workplace



Making meetings better

Chris has experienced firsthand how Zoom helps connect Convera employees on a daily basis. "We have greatly benefited from Zoom and its ability to break down the walls around what collaboration looks like," he said.

Part of that is improving the experience around meetings – before, during, and after them. "So many of us have our days revolve around meetings," Chris said. "The idea that we can use **continuous meeting chat** to pregame a meeting with questions, have the same chat available during the meeting, and follow up in that chat for discussion afterward frees us from the ping-pong of getting a meeting invite by email, talking in chat, getting an agenda in a word doc, and taking notes in another program."

Employees can get even more help in meetings with AI Companion available to **automate notetaking**, identify action items, and highlight important topics of conversation in meeting recordings. "AI Companion's meeting summaries are a game-changer for us," Chris said. "It's helping people be effective in meetings. People can be more present because they're less concerned about having to take down notes. They can be emotionally engaged and more inclusive of who is in the meeting."

Chris and his team also looked at how the physical meeting experience could be improved through a blend of hardware and software, using Zoom Rooms technology to **video-enable their conference rooms** and outfitting them with Neat devices. With features like **intelligent director**, cameras can highlight people in the room to enable better engagement and inclusion.

“Neat Boards and Neat Bars are technologies that people are wowed by and are meaningfully making a difference in the meeting experience, helping to democratize it so that whether you’re in the room or remote, your experience is the same,” Chris said. “We see significant benefits in the years to come, especially as we examine what our **in-office collaboration experience** looks like, and how we maximize that for the particular types of collaboration that are happening in those offices.”

A tightly integrated employee experience

As the head of Convera’s digital workplace group, Chris is mindful of the **employee experience** and how engagement is built, especially when colleagues aren’t in the same physical location. For Convera, it starts on Workvivo.

Workvivo is where Convera employees engage with each other on a variety of issues. According to Chris, they post organizational announcements, recognize employees doing a great job, and highlight work anniversaries and birthdays. Convera began using Workvivo as an employee engagement platform in 2022, so when Workvivo became part of the Zoom family in 2023, it was a happy coincidence to have everything under one roof.

“I was over the moon because of the benefit that was coming to us,” Chris said.

Convera was an early adopter of using **Workvivo within the Zoom desktop client**, and Chris said they’ve seen a noticeable increase in engagement with the platform.

It also helps with communicating across teams and entire departments. “We can communicate with everyone in a particular org as identified by the leader of that org. That’s really hard to do in other solutions, but it’s cake inside of Workvivo,” Chris said.

He’s excited about the potential to give employees more ways to connect and develop their careers on Workvivo. “We’re going to be partnering with Zoom and Workvivo on designing a solution to engage our employees and expand beyond shoutouts and kudos, encouraging people to be more engaged, include their peers, and even see it as a way that they can progress in the organization,” Chris said.

We were the first organization outside of Zoom to enable Workvivo within our Zoom desktop application, and we’ve seen engagement with Workvivo almost double internally as a result of that.

CHRIS BLACKSTONE,
Director of digital workplace



On reimagining the digital workplace

In addition to making plans with Workvivo, Chris and his team have been testing Zoom Scheduler with a small group of employees to integrate an **easier scheduling process** into the Zoom experience. He believes there are efficiencies built into using Zoom tools alongside each other rather than trying to piece together solutions from multiple companies.

“I often think of digital workplace and digital collaboration groups as functioning almost like mini-consultancies inside of an organization,” Chris said. “People can bring us their weird and strange problems and we help them come up with a solution. And Zoom has been tremendous in helping us to solve and meet those needs.”

His advice to other digital workplace leaders? “Don’t think of Zoom as just a meeting platform. It provides so many other features in ways that are more approachable for people than other solutions.”

“Think of your preferred future. How do you really want to be working together with others in your organization? And let’s see if the solution that you’re looking at – solutions like Zoom – can really help you get to that preferred future because of how well it works together.”



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