



STOP WANDERING.

**YOUR PATH OUT OF THE
VENDOR DESERT**



**SANDLER
PARTNERS**

TOGETHER WE THRIVE



WHAT WE'LL COVER TODAY

The Desert

Why technology purchasing decisions are harder than they should be — and the four forces working against you

Your Guide

Who Sandler Partners is, how we work, and why our model is different

Three Stories

Real organizations that found their path to the right provider— with help from Sandler Partners

Your Takeaway

A framework you can apply this quarter to any major technology decisions



***BUYERS SPEND 83% OF
THEIR TIME ON INTERNAL
MEETINGS AND RESEARCH
— NOT MOVING THE
PROJECT FORWARD.***

YOU'RE NOT SHORT ON OPTIONS. YOU'RE BURIED IN THEM.

Too many vendors.
Overlapping capabilities.
Everyone claims to be the answer.
Every demo looks great.

**And
somehow,
you're still
wandering?**

That's the desert.
And most contact center leaders are navigating it alone.

FOUR FORCES WORKING AGAINST YOU



Legacy Deficit

Internal teams pay an education tax — repeating requirements to dozens of vendors, followed by months of aggressive unsolicited follow-up.



Fragmented Discovery

Each vendor pitches their own slice. No one maps where capabilities overlap or where the gaps are.



Misaligned Incentives

Direct reps are paid to sell, not solve. Quota-driven models incentivize force-fitting proprietary solutions.



Market Opacity

Pricing frameworks are deliberately complex. True apples-to-apples cost comparisons are nearly impossible.

YOUR GUIDES



**Ethan
Larson**

- National Sales Director
- 8 years at Sandler Partners guiding organizations through complex technology decisions.
- Extensive industry experience in healthcare, dental, and financial services.
- Deep expertise across the full technology stack – CCaaS, UCaaS, connectivity, cloud, and cybersecurity.



**Ben
Edwards**

- Director of CX & AI
- 4 years at Sandler Partners.
- Former contact center infrastructure leader, 5,000 agents.
- UCaaS/CCaaS provider side. Early in AI + speech analytics in 2016.

THE PREMIER ADVISORY SERVICES COMPANY IN THE U.S.



**20+
Years**

Helping organizations navigate technology decisions across every major vertical



**72,000
Customers**

From SMB through mid-market to enterprise – Cybersecurity, Contact Center and AI, Voice, Network, and Cloud



**500+
Providers**

Including all major public players – access to relevant options in the market



**No Invoice.
Ever.**

Our fees are pre-negotiated with the vendor ecosystem. Our Advisory Services are yours, always free of charge



**We Do This
Every Day**

Most organizations make a platform decision every 3–5 years. We do it every day

YOU PLANT ONE FLAG. WE MAP THE TERRAIN.

01

Requirement and Outcome Mapping

You brief us once with a Senior Architect. No repeating yourself to dozens of salespeople.

02

Market Recon

We interview providers, map capabilities, and filter the noise.

03

Shortlist & Intel

We present top options in a side-by-side Comparison Matrix with clear pros, cons, aligned to you.

04

Deal Advocacy

We facilitate presentations, POCs, and help negotiate the hardest discounts and most favorable terms.

05

Direct Execution

You contract directly with the provider. We ensure transition and go live.

06

Lifetime Support

Ongoing advocacy, escalation support, and renewal optimization across the life of the contract.



70%+
***OF PROCUREMENT IS
PARTNER INFLUENCED***

THREE PROMISES. PROVEN IN EVERY ENGAGEMENT.

01

Our Advisory Services are always free

02

Expertise across 500+ Providers

03

Agnostic evaluation of solutions by design



STORY 1

**NON PROFIT
BEHAVIORAL HEALTH CARE**

HERE'S WHAT WE SAW.



A healthcare nonprofit – Behavioral Health, multi-site clinics, HIPAA-regulated, delivering critical services.



Their storage and backup vendor had been acquired. The moment the deal closed, support went reactive. QBRs stopped. No one owned the account.



Meanwhile their footprint was expanding. And the vendor they were counting on had effectively disappeared.



This organization didn't have a technology problem. They had a trust problem.

WITHOUT SANDLER, HERE'S WHAT THEY WOULD HAVE DONE.

×

Gone back to the vendor market. Repeated their requirements to every rep who called back. Gotten sold to by whoever was most aggressive.

×

And likely landed in the same situation two or three years later — because nothing in that process protects you from a vendor whose priorities change.

×

Instead, they called us. We stepped in as their advisor — at no cost — to run the process they weren't ready for or market knowledge to run themselves.

×

They didn't need another vendor. They needed someone who wasn't one.

WE DIDN'T START WITH A VENDOR. WE STARTED OVER.



Requirement Mapping

Documentation was stale. We rebuilt RPO and RTO targets from scratch with a Senior Architect. Scoped the full HIPAA footprint. Defined what accountability needed to look like.

The Solution

DRaaS on Veeam + Nutanix. Encrypted, immutable backups. Geographic diversity. Annual DR testing baked into the contract.

Lifetime Support

30-day check-ins then Quarterly reviews. Ongoing advocacy. We stayed.



PROVIDER SPOTLIGHT:



What They Do

Purpose-built backup and disaster recovery for mid-market and enterprise. Not a general IT vendor. Specialists.



What Makes Them Different

Immutable, encrypted, geographically diverse backups. Annual DR testing included. 24x7x365 U.S.-based support. A real person, every time.



Why Right for This Customer

HIPAA-grade data protection. Clear SLAs. Named ownership – exactly the accountability the previous vendor had abandoned.



They were brought in because they were the right answer in the short and long-term



**OUR ADVISORY SERVICES
ARE ALWAYS FREE**



STORY 2

TRAVEL & HOSPITALITY

HERE'S WHAT WE SAW.



A travel and hospitality company. International footprint, high seasonal call volume. Omnichannel across 10+ channels.



Leadership was asking for an AI roadmap. The budget wasn't there. Or so they thought.



They asked us to come in and audit existing IT Spend and help them find savings. We found legacy technology at premium prices.



The path to AI depended on a Connectivity project that had no technical dependency.

WITHOUT SANDLER, HERE'S WHAT THEY WOULD HAVE DONE.



Told leadership the AI investment would have to wait for next year's budget cycle.



Spent the next twelve months building a business case for spend that didn't exist yet.



Kept renewing the same connectivity contracts.



We didn't find new money. We found money that was already theirs.

WE DIDN'T JUST FIND A BETTER DEAL



Technology Spend Assessment

Core capability in our Requirement Mapping step — what you use, what you're paying for it.

Right-Sized the Network

They'd moved to Cloud applications. Legacy and expensive SD-WAN no longer fit. We recommended Cloud Direct Connect to connect to SaaS not their old HQ's datacenter.

Surfaced the Delta

The difference between what they were paying and what the new contract cost was reframed as available AI budget.



PROVIDER SPOTLIGHT:



What They Do

Network-as-a-Service— private, on-demand connectivity to 350+ clouds across 1,000+ data centers in 27 countries. Provisioned in under 60 seconds.



What Makes Them Different

One vendor replaces MPLS, cross-connects, and cloud direct connects. Self-service. Flexible terms, no 36-month lock-in. Global reach, single vendor.



Why Right for This Customer

Legacy MPLS and direct connects priced like the market hadn't moved in a decade. Megaport replaced it — surfacing budget hidden in their connectivity stack.



Modernized the network. Cut the spend. Funded the AI.

THEIR AI PROJECT IN BRIEF



Unified Omnichannel Experience

One experience across 10+ channels — web, mobile, messaging, and social — held together as a single conversation, not stitched-together silos.

Frictionless Booking

Reduce drop-off and lift conversions in the booking flow.

Routine Containment

Automate the high-volume, low-complexity work so the team can spend its time on the calls humans actually need to handle.

Peak-Season Resilience

Hold engagement quality through seasonal volume spikes.



PROVIDER SPOTLIGHT:



What They Do

Enterprise conversational AI across 35+ channels — autonomous agents that understand, reason, and resolve inquiries.



What Makes Them Different

90% automation on routine inquiries. 135+ languages. 150+ CRM/CCaaS/ITSM integrations.



Why Right for This Customer

Needed to scale support across 10 channels without scaling headcount.



Yellow.ai didn't replace human agents. It absorbed the routine volume that was burning them out



**EXPERTISE ACROSS
500+ PROVIDERS**



STORY 3

REGIONAL BANK

HERE'S WHAT WE SAW.



A regional bank, multi-site, high call volume, ready to migrate to Cloud Contact Center and consolidate from calls from branch to a single team.



Then leadership issued a mandate: AI has to lead the way with a provider who does it all – CCaaS, WFM, AI



The mandate was consolidation and modernization. The work was making sure this meant best fit, not easiest sale.



They didn't need another vendor demo. They needed an honest evaluation – and a partner keeping score.

ONE PLATFORM: CCAAS, WFM, AND AI



Consolidate to the Cloud

Replace legacy premise system. Migrate multi-site contact center to one cloud platform with single-team routing across branches.

One Vendor, Full Stack

Single contract for CCaaS, WFM, and AI. Intelligent routing, IVR, outbound dialer, deep CRM and Core Financial integrations, Business Intelligence — all under one platform, no stitched-together stack.

Shortlist & Intel

Top providers presented side-by-side in a Comparison Matrix. Pros, cons, and trade-offs aligned to your priorities — customer makes the call with full context.



PROVIDER SPOTLIGHT:

Five9



What They Do

Enterprise CCaaS platform – intelligent routing, IVR, outbound dialer, deep CRM integrations, and native AI agents. Built on real-time visibility into 100% of contact center activity.



What Makes Them Different

Strong implementation, high NPS. Real-time customer journey context – virtual or live. Enterprise focus (100+ seats), strongest in financial services, healthcare, and retail.



Why Right for This Customer

A multi-site regional bank needed one vendor for CCaaS, WFM, and AI – with Core Financial integrations to match. Five9 delivered.



The right platform, picked on merit – not just on mandate.

HERE'S WHAT WE SAW.



Six months in. CCaaS and WFM are humming. But agent assist and Auto QA aren't moving the metrics leadership expected.



Accept the ceiling. Blame the AI. Or get talked into ripping out a working platform.



We were already in the relationship. And because we have no quota tied to Five9, we could ask the question the Five9 rep couldn't.



We saw Five9 as the foundation, not the finish line — and we had the courage to tell leadership the breakthrough was in the AI overlay.

THE AI OVERLAY DECISION



Market Recon

Identify AI providers targeting the specific outcomes the bank needed – agent assist, real-time guidance, full-call QA. Filter the noise; surface the contenders worth a closer look.

Comparison Matrix

Baseline Five9's native AI against the top overlay candidates. Score side-by-side across first-contact automation, routing intelligence, post-call analytics, QA, integration complexity, and pricing.

Proof of Concept

Live test against the bank's actual call volume. The overlay had to clear the bar on agent assist and Auto QA before signing.



PROVIDER SPOTLIGHT:

 **OBSERVE·AI**



What They Do

AI agent platform for CX. Deploys voice and digital agents that resolve high-frequency interactions before a human steps in – and auto-QAs 100% of calls.



What Makes Them Different

Phased rollout from post-call analytics and Auto QA into real-time coaching and autonomous voice agents – speech, workflow, and quality in one governed platform.



Why Right for This Customer

Real-time guidance and 100% QA coverage – delivered on top of the existing platform, no rip-and-replace.



25% increase in CSAT scores on average and a reduction in average handle time by 30%.



AGNOSTIC EVALUATION OF SOLUTIONS BY DESIGN

THREE STORIES. THREE PROMISES. PROVEN.

Our Advisory Services are always free

SMB Behavioral Health

Our Advisory Services are yours, always free of charge. They didn't pay us. They didn't have to.

Agnostic evaluation of solutions by design

Regional Bank:

We told a happy Five9 customer their trusted vendor's native AI wasn't their best option. That's what agnostic expertise looks like.

Expertise across 500+ Providers

Travel and Hospitality:

We found budget they didn't know they had — and made sure it funded AI that changed what their contact center can do.



STOP WANDERING THE DESERT.

***THE PATH OUT IS ONE CALL, ONE
ADVISOR, ONE DECISION YOU CAN
DEFEND.***



Meta Glasses Giveaway

Win a Pair of Meta Glasses



Ask us how to be
entered into the raffle.

Stop by our booth
for your chance to win.



Your *desert oasis* just got smarter.

READY TO FIND YOUR PATH?

Use the QR Code to Schedule Time

Visit Our Booth

Come talk to Ethan and Ben.

Come enter our Raffle



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