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Case Study

Modernizing Branch Infrastructure for a Leading Financial Institution

Secure, Scalable Network Management with ZPE Systems

Discover how a collaborative proof of concept validated a streamlined infrastructure solution, and established a repeatable model for financial services opportunities.

Financial institutions need secure, reliable infrastructure across distributed environments. But IT teams managing branch networks must balance consistent deployments and centralized visibility with stringent security requirements and limited on-site resources.

A leading U.S. financial institution addressed these challenges by working with ZPE Systems and a trusted technology partner to evaluate a modern approach to branch infrastructure management. Using ZPE's Nodegrid platform, the team validated a solution designed to simplify deployments, strengthen management security, and support future growth.

The team conducted a proof of concept that validated both the technical capabilities of the Nodegrid platform and the operational advantages delivered through ZPE Cloud.

While several competing solutions were evaluated, the financial institution identified **ZPE Cloud's centralized management capabilities** and **Zero Touch Provisioning automation as key differentiators**.

About the Financial Institution

A leading U.S. financial institution providing consumer and commercial banking services across the Midwest and Southern United States. Its extensive branch network supports a broad range of banking services, making secure, reliable, and scalable technology essential to daily operations.

CHALLENGES

- Disparate deployments across sites
- Manual configurations, ops complexity
- Improve security & access controls

SOLUTIONS

- Nodegrid Net SR for consolidated stack
- ZPE Cloud for ZTP & centralized management
- Secure out-of-band with access controls

BENEFITS

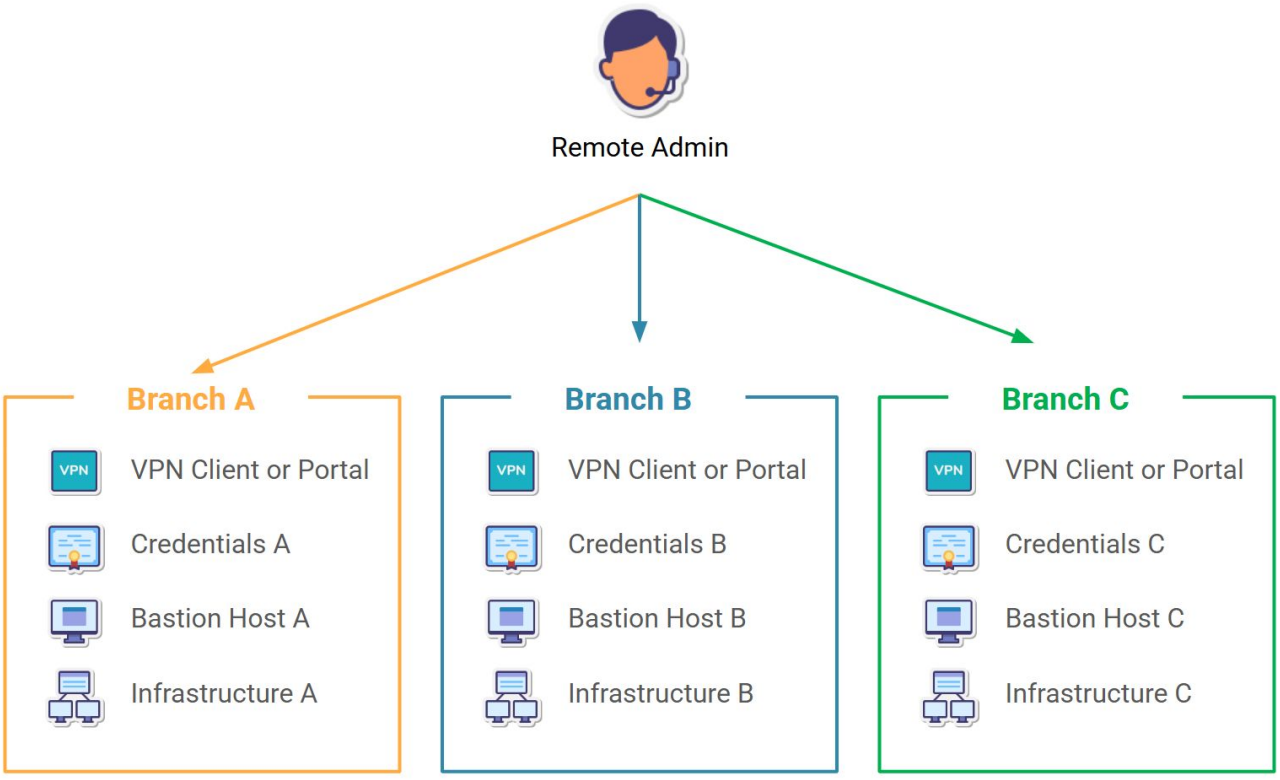
- **Easy to Scale:** Fewer devices, repeatable deployments, automated provisioning
- **Simplified Ops:** Reduced implementation time & operational overhead
- **Security in Layers:** More control over user privileges & infrastructure access
- **Partner Opportunity:** Validated solution framework for future engagements

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The Challenge

Managing infrastructure across a distributed branch network is crucial for financial institutions. Teams must maintain configurations, manage remote equipment, and control administrative access. However, these introduce operational and security challenges that can stand in the way of business goals.

Manual deployment processes can slow new site rollouts, while fragmented management tools make it difficult to maintain consistent configurations and practices across branches. Separate devices for routing, switching, connectivity, and infrastructure management also increase hardware requirements and operational complexity.



The institution needed a solution that could help its infrastructure teams:

- **Simplify deployments:** Reduce manual setup and streamline device onboarding.
- **Standardize operations:** Apply consistent configurations and management practices across locations.
- **Centralize control:** Manage distributed sites through one unified platform.
- **Strengthen security:** Enforce controlled admin access and least-privilege permissions.
- **Improve resilience:** Maintain infrastructure access even when the production network is unavailable.

The institution evaluated several solutions, but only ZPE Systems could deliver these capabilities in a practical, scalable manner.

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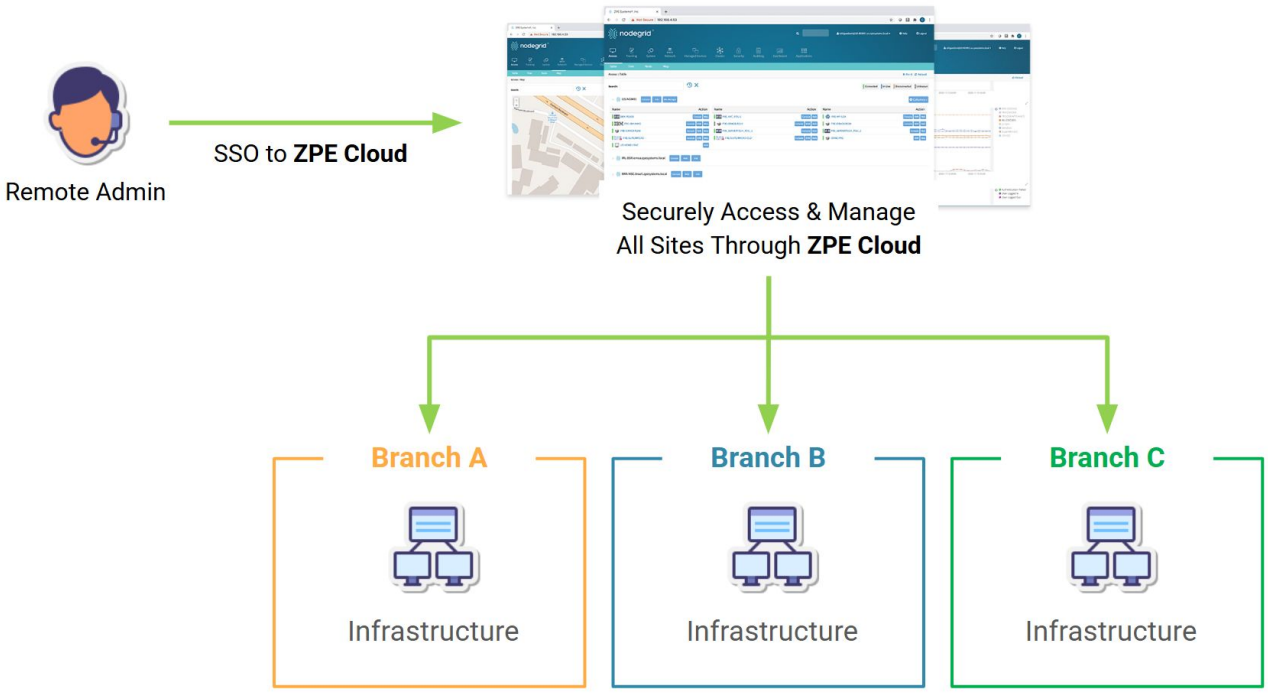
The Solution

ZPE Systems worked closely with a partner to conduct a proof of concept in their lab environment. The evaluation used **ZPE's Nodegrid Net Services Routers (NSRs)** to demonstrate how automated provisioning, centralized management, and secure remote access simplify distributed infrastructure operations.

The evaluation focused on three key capabilities:

Streamlining Deployments
Deploying infrastructure across many locations requires significant manual configuration and coordination. **ZPE Cloud uses Zero Touch Provisioning** to streamline device onboarding and establish a consistent deployment process. This allows teams to eliminate extensive, on-site setups, as well as standardize configurations and simplify lifecycle management. In addition, the Nodegrid Net SR (NSR) is a multi-function device that consolidates routing, switching, cellular, out-of-band, and automation, eliminating the need for installing separate devices.

Centralizing Management
Managing infrastructure through disconnected tools and workflows introduces a lot of complexity. **ZPE Cloud is a browser-accessible platform** that unifies everything from basic administrative tasks, to config rollbacks, to device imaging and full rebuilds. Teams get a centralized management system that ensures consistency across distributed infrastructure while simplifying operations.



Strengthening Security & Remote Access
ZPE's Nodegrid platform provides security in layers. At the hardware layer, Nodegrid devices come with **dozens of enterprise-grade security features**, including secure boot and TPM 2.0. Nodegrid also completely isolates the management infrastructure from production assets, blocking potential threats from moving laterally and taking over access. Additionally, the management network is protected by **multi-factor authentication (MFA)** and **role-based access controls (RBAC)**. Teams gain peace of mind knowing roles and permissions are properly segmented and secured.

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Proven Results

$375,000 Strategic Win

The engagement delivered a significant commercial milestone and established a repeatable approach for future opportunities:

$375k in purchase orders: Three POs totaling $375,000 closed during Q2 FY26.

Validated solution value: POC validated Nodegrid and ZPE Cloud's capabilities in a practical environment.

Ongoing demo platform: NSRs in the partner's lab support demos & POCs for more FinServ customers.

Repeatable solution: Established a framework for partners to showcase ZPE's approach to new prospects and customers.

Turning One Win Into Opportunities

For channel partners, this goes beyond a single transaction. The combination of centralized management, automated provisioning, and secure out-of-band access provides a repeatable solution framework for customers facing similar challenges across distributed environments.

Proving ZPE's solution in the lab further supports that opportunity by providing an environment where the solution can be demonstrated and evaluated with prospective customers.

Why ZPE Systems?

The combination of Nodegrid, ZPE Cloud, and Zero Touch Provisioning differentiated ZPE by bringing infrastructure consolidation, centralized management, automation, and security together.

This creates a compelling value proposition:

Fewer Devices to Manage: Replace separate components with one multi-function platform.

Simplify Customer Ops: Reduce manual work by combining centralized management and automated provisioning.

Boost Resilience: Provide an independent out-of-band management path that accelerates recovery when the primary network is unavailable.

Address Security Requirements: Deliver enterprise-grade security features at the hardware, software, and management layers.

Build Repeatable Solutions: Standardize infrastructure designs that can be demonstrated, deployed, and adapted for other customers.

Build Your Next Opportunity With ZPE

Partner with ZPE Systems to demonstrate a consolidated infrastructure solution for your next financial services opportunity.

Contact us to discuss solution positioning, proof-of-concept opportunities, and enablement resources



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