



Case Study

A leading global financial services firm seeks skilled help desk resources after merger forces integration of two different banking systems

Client:

A Leading Global Financial Services Firm

Industry:

Financial Services

Service Offering:

Staffing Services

- Infrastructure Staffing Services

Component Services

- Support Services

- Consolidated Services Desk



The Situation: A leading global financial services firm was in the process of merging with a large retail banking center. The merger combined the power of investment banking resources with the ease and convenience of retail banking. The new conglomerate would feature enhanced access to market data, proprietary investment research, account monitoring, and more payment and funds transfer options. In order to realize back-office efficiencies, the two companies had to integrate their two, very different banking systems into one comprehensive system. The client decided to approach the integration in two parts in order to limit the disruption to daily retail branch activities. The first stage would include approximately 500 sites and the second stage would cover nearly 330 sites.

The Challenge: The client anticipated an increase in help desk calls as the new banking system was delivered to its retail branch offices. In order to address these calls, the client needed to increase its existing help desk staff for the duration of the rollout. The client sought a partner company who was able to quickly provide skilled help desk resources that had customer service and banking industry backgrounds. More than 45 resources were needed to augment the client's existing help desk team to assist in supporting the two conversion projects. These resources would undergo six months of extensive training on the conversion's proprietary systems and procedures, and it was especially important that they remain on the project through its completion.

The Response: TEKsystems®, a leading provider of technology staffing and services, competed against five other vendors for the opportunity to provide help desk resources to the client. After several detailed meetings with the client to determine the project's critical factors, TEKsystems noted that the most important aspect was the stability of a team. To answer this concern, TEKsystems created a plan that included completion bonuses for its temporary help desk resources. TEKsystems' plan also offered a project manager at no extra cost who would be responsible for scheduling, frequent performance reviews, and mentoring throughout the training process. In March 2006, 45 of TEKsystems' help desk resources began the client's six-month training process.



The Result: Due in part to its reliable performance on the initial 500 site conversion, TEKsystems was asked to remain on staff to complete the additional 330 site conversion for the client's newly acquired bank. In order to reduce training costs and promote consistency, the client transitioned TEKsystems' Technical Professionals from the initial conversion directly into the new project. These Technical Professionals already possessed the necessary knowledge and experience, which helped eliminate the need for retraining. TEKsystems' project manager contribution allowed the client's help desk supervisor to remain focused on daily operations instead of conversion help desk logistics.

As a result of the initial bank merger and additional bank acquisition, the client estimated a permanent increase in help desk call volume and decided to hire several of TEKsystems' Technical Professionals to its regular staff. TEKsystems currently has 31 resources working on the second phase of the conversion.