



IMPROVED SUPPORT ACROSS NORTH AMERICA THROUGH FAST, EFFECTIVE INCIDENT RESPONSE & RESOLUTION

INDUSTRY:	Financial Services
EMPLOYEES:	over 12,000
LOCATIONS:	over 70 sites across the world

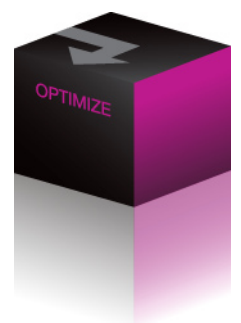
Touchbase's client is a global provider of banking, financial, advisory, investment and funds management services. Its main business focus is making returns by providing a diversified range of services to institutional, corporate and retail clients around the world.

The company employs over 12,000 people and has assets under management of over \$200 billion. The Financial Services Company operates across the world in more than 70 office locations.

Touchbase's engagement with the Financial Services Company began in Australia with the successful design and delivery of a solution which is currently supported and managed through the OPTIMIZE service. The company engaged Touchbase due to the value of having a single point of contact technology services partner with a complimentary global footprint. This led to the opportunity for Touchbase to add value to its North American operations.

Touchbase has since been working closely with its client to help it create consistent and centrally manageable, national communication environments in both Australia and North America. This is laying the foundation to a consistent global platform to further align with the Financial Services Company's vision for the future and to provide control over how it communicates as an organization.

This client story will focus on the engagement in North America. This ongoing engagement began with Touchbase reconfiguring an existing Cisco communication system that was part of an organization (with around 400 people in 4 locations) which it had acquired. This project initiated discussion around how the North American communication environment could be improved to further enable the Financial Services Company's ongoing strategy of aligning technology to business objectives.



"Touchbase works closely with its client to help it create consistent and centrally manageable national communication environments in both Australia and North America"

OPTIMIZE SERVICE

FINANCIAL SERVICES COMPANY



FOCUS

Touchbase designed and delivered a communication environment for the Financial Services Company aligning technology to its business strategy. Touchbase and its client work in union to ensure it is constantly delivering to the business; enabling it to communicate across its locations in a consistent way and providing the necessary support to its users.

“Seamless information via a consistent service desk system worldwide”



THE METHOD

The Financial Services Company benefits from *Support* to ensure any issues or changes are resolved promptly.

OPTIMIZE Support

Touchbase support encompasses 24 x 7 coverage, across 19 locations –

INCIDENT MANAGEMENT

- Incident detection and recording
- Classification (determine urgency and impact) and initial support
- Implement escalation process if there is a danger of failing to meet the agreed service levels
- Investigation and diagnosis
- Resolution and recovery
- Incident closure
- Incident ownership, monitoring, tracking and communication

PROBLEM MANAGEMENT

- Minimizes the adverse impact of incidents and problems that are caused by errors within the IT infrastructure; and prevents the reoccurrence of incidents related to these errors.

TECHNICAL SYSTEM ADVICE

- From time-to-time, the company's internal technology team requires technical information on the products that Touchbase supports for it.

ON-SITE RESOLUTION

- On occasion support engineers visit the Financial Services Company's locations to resolve an incident or problem.

ADVANCE REPLACEMENT PARTS

- Through partnership with its strategic vendors, Touchbase is able to leverage the provision of parts for its client's infrastructure. These parts are reserved for maintenance, and allow for the quick resolution of possible hardware failures.

VENDOR ESCALATION MANAGEMENT

- The Touchbase partnerships that are in place ensure that the Financial Services Company has Level 3 and Level 4 assistance in the event an incident or problem requires escalation to the vendor.

MOVES, ADDITIONS AND CHANGES (AND SOFTWARE MACS)

- MACs are organized and completed in a short timeframe by certified Touchbase engineers. These are carried out in accordance with the Change Management process.

The Touchbase Client Engagement Manager is responsible for all aspects of the ongoing relationship with the Financial Services Company providing –

- A single point of contact for the escalation of all service related incidents that are business affecting
- A single point of contact for engagement of any project or purchasing activities
- An assessment of Touchbase's performance against any Service Level Agreements
- Control and documentation of Change Management

Important issues and opportunities are discussed and actioned through the Client Engagement Manager's quarterly value review. Some topics covered in a recent value review included –

Projects-in-Progress Review

- Installation of Call Accounting system - Complete
- Additional sites brought onto central cluster - Complete
- Three additional sites being integrated into central cluster - In progress
- Installation of Cisco Unified Presence Server publisher and subscriber - In progress

Service Level Agreement Review

- 70% reduction of incidents from previous quarter
- 100% response and resolution within SLAs for severity levels 1-2
- Detailed review of all incidents and trend analysis

“Problem Management minimizes the adverse impact of incidents and problems that are caused by errors within the IT infrastructure; and prevents the reoccurrence of incidents related to these errors”

TECHNOLOGY

The following technology, now implemented and managed through the OPTIMIZE service, gives the Financial Services Company a sound platform that can be easily managed centrally and provides confidence through a system built for business continuity:



FOUNDATION	COLLABORATION	MOBILITY	CUSTOMER CONTACT
<p>IP Telephony</p> <ul style="list-style-type: none"> Cisco Unified Workspace Licenses Cisco Unified CallManager dispersed/redundant cluster Cisco IP Phones 16 additional SRST locations 3 further stand alone Cisco Unified CallManager clusters 	<p>Unified Client</p> <ul style="list-style-type: none"> CUPS (Cisco Unified Presence Server) integration with MOC (Microsoft Office Communicator) <p>Messaging</p> <ul style="list-style-type: none"> Cisco Unified Unity (fully redundant) for all users 	<p>Soft Phone</p> <ul style="list-style-type: none"> Test environment and limited use of IP Communicator <p>Further development</p> <ul style="list-style-type: none"> Single number reach and click-to-dial integration with MOC 	<p>Interaction Management</p> <ul style="list-style-type: none"> 15 agent Cisco Unified Contact Center Express for internal IT support
<p>“A partner matching its global coverage is necessary for Touchbase's client to enable it to have a single point of contact and a consistent method of implementing solutions for all locations”</p>			<p>Integration with:</p> <ul style="list-style-type: none"> Nortel PBX (until transition to Cisco complete) BT Dealer Board Turrets

PRINCIPLES ALIGNED TO FINANCIAL SERVICES COMPANY



<p>COVERAGE</p> <p>A partner matching its global coverage is necessary for the client to enable it to have a single point of contact and a consistent method of implementing solutions for all locations. The ongoing North American OPTIMIZE is coordinated in tandem with the Australian operation. These two initiatives have laid the foundation for a globally consistent communication environment.</p>	<p>CAPABILITY</p> <p>This company is a leading and respected financial institution. It had to ensure that, in selecting a partner to align with its internal and external communication technology needs, it was selecting a company matched to its ambitions and quality. Touchbase top-level accreditations strengthen the confidence in this match.</p>	<p>CONSISTENCY</p> <p>This client appreciates the consistent engagement model. Touchbase employs across Asia, Australasia, Europe and North America. Touchbase uses this structure to provide depth, speed and flexibility to projects carried out in North America and Australia with a view to future global consistency for the company's communication environment.</p>	<p>CULTURE</p> <p>Touchbase's people are focused on doing what is needed in order to help the Financial Services Company retain its leadership in the global market.</p>	<p>CLIENTS</p> <p>Touchbase has a record working with some of the most well respected financial institutions. This knowledge and experience has been transferred into OPTIMIZE, providing its client with solid support of a consistent technology platform on which tailored applications can be applied across the world to improve a number of imperative business factors.</p>
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DELIVERING COMPETITIVE EDGE

"The users' experience of communication technology is heightened through OPTIMIZE due to the confidence and positive impact of the support they receive"

VISION

As a worldwide financial institution committed to delivering returns for its clients it is integral that this Financial Services Company's technology environment operates at an optimum level. Touchbase worked with its client to tailor this service to its unique needs, issues and opportunities. The company's internal technology team benefits from the quarterly value review to ensure support requirements are constantly in line with the vision for the communication environment and its efficient alignment to the business strategy.

EXPERIENCE

The users' experience of communication technology is heightened through OPTIMIZE due to the confidence and positive impact of the support they receive. The Financial Services Company's helpdesk handles severity level 3 & 4 incidents capably. The helpdesk is able to pass any unresolvable severity 1 & 2 incidents directly to a Touchbase engineer who is ready to take the call at any time.

INTELLIGENCE

Through the quarterly value review the Financial Services Company gains valuable information about the communication environment. Call Accounting provides the capture, recording and visibility of telephone usage events – which is integral to the Financial Services Company's business.

CONTROL

The internal technology team is able to work with one partner for the entire group's communication environment. Since the delivery of a consolidated technology landscape control has become tight. OPTIMIZE further increases this by giving Touchbase's client the confidence that any incidents that could affect business flow are resolved in market-leading times, every time.

COST

The cost of the communication environment is made more visible through Call Accounting. Also cost has been positively impacted through Touchbase taking responsibility for many areas of support, allowing the Financial Services Company to allocate valuable resources to more strategic efforts.

Touchbase exists to maximize the positive impact communication technology can have on a company's people, teams and customers.

We do this across the world through four defined services that are used by our clients depending on what unique needs, issues and opportunities they have.

The focus is always on giving our clients a competitive edge through their use of efficient and effective communication.

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TOUCHBASE: OPTIMIZING BUSINESS COMMUNICATION