



CONTROL OVER COMMUNICATION ENVIRONMENT PROVIDES CLARITY FOR ITS ALIGNMENT TO STRATEGY

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.



"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"

DELIVER SERVICE

FINANCIAL SERVICES COMPANY



FOCUS

The DESIGN service provided the template for this subsequent DELIVER service. The Financial Services Company was operating with Nortel PBX across its North American operations and had recently acquired an organization which used Cisco CallManagers and IP handsets, together with Unified Client. The Financial Services Company saw in this technology the improvements to functionality that created greater productivity and efficiency for its users.

The delivery of the communication environment spanned 19 locations in North America. Touchbase mitigated the risk in this project by firstly implementing one main cluster across four locations followed by three further clusters implemented in sequence across the region. Once these had been developed and deployed and the users were happy with the new functionality, SRST sites in the remaining locations were implemented and brought in line one after the other until all 19 locations were integrated with the Nortel PBX.

The next step in DELIVER is to release the Nortel PBX to realize the efficiencies of a Cisco platform running applications.

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THE METHOD

A Touchbase PMP qualified Project Manager took responsibility for the solution, managing the sequential implementation of each location –

- Phase 1: Core Telephony Cluster
- Phase 2: Integration of further locations into core cluster & addition of three further clusters
- Phase 3: Improving Collaboration across North America
- Phase 4: Implementation of UCCX for 50 agents across 3 further locations

"Touchbase has a record working with some of the most well respected financial institutions. This knowledge and experience has been transferred into DELIVER, providing the Financial Services Company with a template for a solid technology platform on which tailored applications can be applied across the world to improve a number of imperative business factors."

DELIVER Define

The Touchbase team took control to manage risks, issues and changes to the plan working closely with the Financial Services Company's IT Director and team –

- By scoping each detail of the project, how it was to be managed and the timescales involved
- By translating the business needs into clearly defined functional requirements of the communication environment
- By ensuring the technical environment the system will be deployed into is fully mapped and any changes necessary are identified

DELIVER Detail

A Touchbase Product Specialist (CCIE) translated the conceptual design into a detailed design that pinpointed the function and value of each single piece of equipment and its interconnection with the whole –

- By ensuring that any configurations that were required to support the strategy were highlighted before the system was built
- By specifying the purpose and need of each technology product and how it is linked to the whole
- By designing system tests to establish that the system worked as it should "technically"
- By collating the data pertaining to the end users of the communication environment
- By developing a fully agreed program of steps necessary to get the organization ready for the new system

DELIVER Develop

Prior to go-live members of the Touchbase team in each location built, configured and tested the elements of the technology to align the physical infrastructure to the goals of the prior stages –

- By installing all hardware, testing this and loading all licensed software
- By configuring and customizing the solution and testing this
- By ensuring the operational staff were comprehensively trained on administrative and operational tasks

DELIVER Deploy

The solution has been deployed on a location-by-location basis. For each location project its system is deployed into the central cluster –

- By testing that the users of the solution were capable of using it efficiently and effectively as agreed in the functional requirements
- By training the users to use the system and maximize its potential
- By making sure all the dependencies and resources were ready to perform the migration
- By ensuring that all the user data entered into the system was accurate and complete
- By migrating the system into production

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>Integration with:</p> <ul style="list-style-type: none"> Nortel PBX (until transition to Cisco complete) BT Dealer Board Turrets 			
<p>"A sound platform that can be easily managed centrally and provides confidence through a system built for business continuity"</p>			

PRINCIPLES ALIGNED TO FINANCIAL SERVICES COMPANY

<p>COVERAGE</p> <ul style="list-style-type: none"> 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. This North American DELIVER service was instigated by a prior solution for locations across Australia. These two initiatives have laid the foundation for a globally consistent communication environment. 	<p>CAPABILITY</p> <ul style="list-style-type: none"> Touchbase's client 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>CONSISTENCY</p> <ul style="list-style-type: none"> The Financial Services Company 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>CULTURE</p> <ul style="list-style-type: none"> 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>CLIENTS</p> <ul style="list-style-type: none"> Touchbase has a record working with some of the most well respected financial institutions. This knowledge and experience has been transferred into DELIVER, providing the Financial Services company with a template for a solid technology platform on which tailored applications can be applied across the world to improve a number of imperative business factors.
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DELIVERING COMPETITIVE EDGE

"Speed of information flow is paramount for the Financial Services Company. People and teams now can communicate with each other more effectively and have the advanced tools to do this with flexibility and precision"

VISION

Each of the Financial Services Company's business groups have a dedicated IT team partnering with them to understand their specific technology needs and to provide innovative and effective solutions. As the company continues to expand, there is increased technology activity globally. The internal technology team's strategic vision is to deliver leading-edge technology that is integral to the company's growth and success. Behind this is the fundamental need to provide a consistent platform to allow easier integration and management of the communication environment globally and to provide specific productivity enhancing applications on top of this. The DELIVER service provided this by ensuring the enabling technology was implemented across the organization seamlessly through staged transitions and closely aligned training.

EXPERIENCE

The experience of communication across the North American operation has improved significantly through various feature enhancements and functionality. For example through the integration of Cisco Unified Client and Microsoft Office Communicator the features of Cisco Unified CallManager have been extended. Individuals have only one call control application from the desktop or mobile workspace, with one-click calling to colleagues. It also provides people's presence status allowing visibility of communication methods open to the user.

INTELLIGENCE

Speed of information flow is paramount for the Financial Services Company. People and teams now can communicate with each other more effectively and have the advanced tools to do this with flexibility and precision. With an intelligently designed and delivered communication platform the organization can now deliver more business enhancing applications for its people to use, and customers to benefit from, into the future. The system is more efficient and new office locations are able to be integrated into the standardized environment.

CONTROL

This solution places control of how the company communicates into the hands of the internal technology team where previously disparate systems had to be handled through different procedures and protocols. This standardized environment links all communication technology together.

COST

By consolidating each location's communication systems waste on short-term solutions has been eradicated. With this platform cost is more visible and can hence be controlled more effectively.

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