

Multiple Channels | Improving Digital Customer Experience



Situation

Financial Services Company Merges Online and Teller Banking for Better Customer Experience

A large commercial bank with 11 million customers actively banking online wanted to deliver a better customer experience by integrating teller banking with online and mobile banking platforms. After focusing on growth and acquisitions, the bank had a backlog of projects that required a project manager to step in and lead the work.

Solution

Successful integration of all the planned projects required participation from approximately 200 people, including product managers, operations and technology leaders, and business owners across multiple channels of the business. With so many similar projects to tackle at once, the client needed a consistent approach to ensure each initiative went smoothly and all stakeholders were informed.

SolomonEdwards provided a consultant with many years of experience in financial services and exceptional project management skills.

This consultant led a group of project managers – each focused on a single initiative – and brought standard processes and governance to all initiatives.

Results

SolomonEdwards managed the integration initiative, overseeing 40 projects in different stages of development and deployment. SolomonEdwards developed a process for planning and execution so that each project followed a similar roadmap and consistent guidelines for review communication and socialization.

By leveraging the same standards for the entire integration initiative, the client achieved quality control and confidence from stakeholders who participated in the structured repeatable process. By sharing best practices with the client staff, the consultant ensured work could continue in the future without SolomonEdwards in the lead.



INDUSTRY:
Banking



DEPLOYMENT:
Team

SERVICES:



Business Transformation

Business Process Improvement

Project Management

Communications