CASE STUDY

BANKING ON THE RIGHT PARTNER

Abstract

Michael Mahoney, Director of Business Support at a major US financial services firm, was caught off guard when a key vendor abruptly terminated their business process management services. With limited internal expertise, the organisation faced a growing pile of unresolved cases, increasing the risk of regulatory penalties and customer complaints. Fortunately, Michael found a solution in Infosys BPM. This case study highlights how Infosys BPM swiftly stepped in to restore order, eliminate the backlog, and generate cost savings of $2.5 Mn.

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A crisis without notice

Michael Mahoney is the Senior Director for Business Support at a leading financial services company offering a range of products and services including online banking, credit cards, business and retail financing, wealth management, and more. Michael's team handles multiple critical accounting processes such as managing negative balances, processing e-checks, and dealing with suspense items, among others.

Of late, Michael had been dealing with a crisis situation. Several months earlier, the organisation had decided to terminate its long-standing outsourcing contract with one of its service providers. As a result, Michael had been on edge about the upcoming closure and the operational challenges it would bring. To make matters worse, the vendor ended their services a month before the planned date for reverse transition of operations. This left Michael in an even more difficult position, as he had to quickly identify critical processes and train and allocate resources on very short notice. Compounding the challenge was the fact that Michael's teams had limited knowledge of these processes, as the vendor had managed them entirely for many years and there was very little in-house process documentation available.

Due to these factors, Michael's team had accumulated a significant backlog of e-check and suspense research cases, which posed a threat to the organisation's service delivery and could negatively impact customer satisfaction. The complexity of these cases, combined with the time-sensitive nature of the backlog, required a rapid and efficient resolution. Additionally, the team's lack of internal expertise further complicated the situation, as they were unable to manage the increasing volume of pending cases on their own.

To address this issue promptly, Michael reached out to Infosys BPM, a trustworthy and reliable partner, for help. Infosys BPM assigned Gowtham as a Project Lead to work closely with Michael and address this issue.

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Transitioning amidst chaos

Gowtham began by establishing a project management office to identify the requirements working with various stakeholders. He then conducted an internal assessment at Infosys BPM to evaluate the company's capabilities to meet these needs. After presenting his findings to the stakeholders, he received their approval to move forward, and the project commenced in earnest.

Approach summary

Moving quickly, Gowtham assembled a team of domain experts from Infosys BPM and tasked them with creating a proof of concept (PoC) for in scope lines of business. Working with their client counterparts, Gowtham's team first gained a thorough understanding of the requirements and conducted detailed assessments. Then they mapped Infosys BPM capabilities with the requirements and presented their project plan to the stakeholders, clearly calling out roles, responsibilities, and timelines. Following this, Michael began to transfer the operational tasks that were previously handled by the former vendor to Gowtham and team.

Gowtham onboarded 70% of the total staff required for the project from within Infosys BPM's talent pool, selecting individuals who had prior experience with similar processes. Additionally, he created standard operating procedures (SOPs) for all the workflows along with checklists for critical steps and completed the team's training within just a couple of weeks. This approach facilitated a swift and seamless knowledge transfer, and the Infosys BPM team started handling live transactions within just three weeks, as against the usual six to eight weeks needed to transition similar processes

The calm after the storm

With Gowtham's strategic planning and impeccable execution, the Infosys BPM team successfully cleared the backlogs, well ahead of the deadlines set with Michael, and also delivered $2.5 Mn in costs savings. Impressed by the team's quick turnaround and performance, Michael extended their contract for an additional 36 months.

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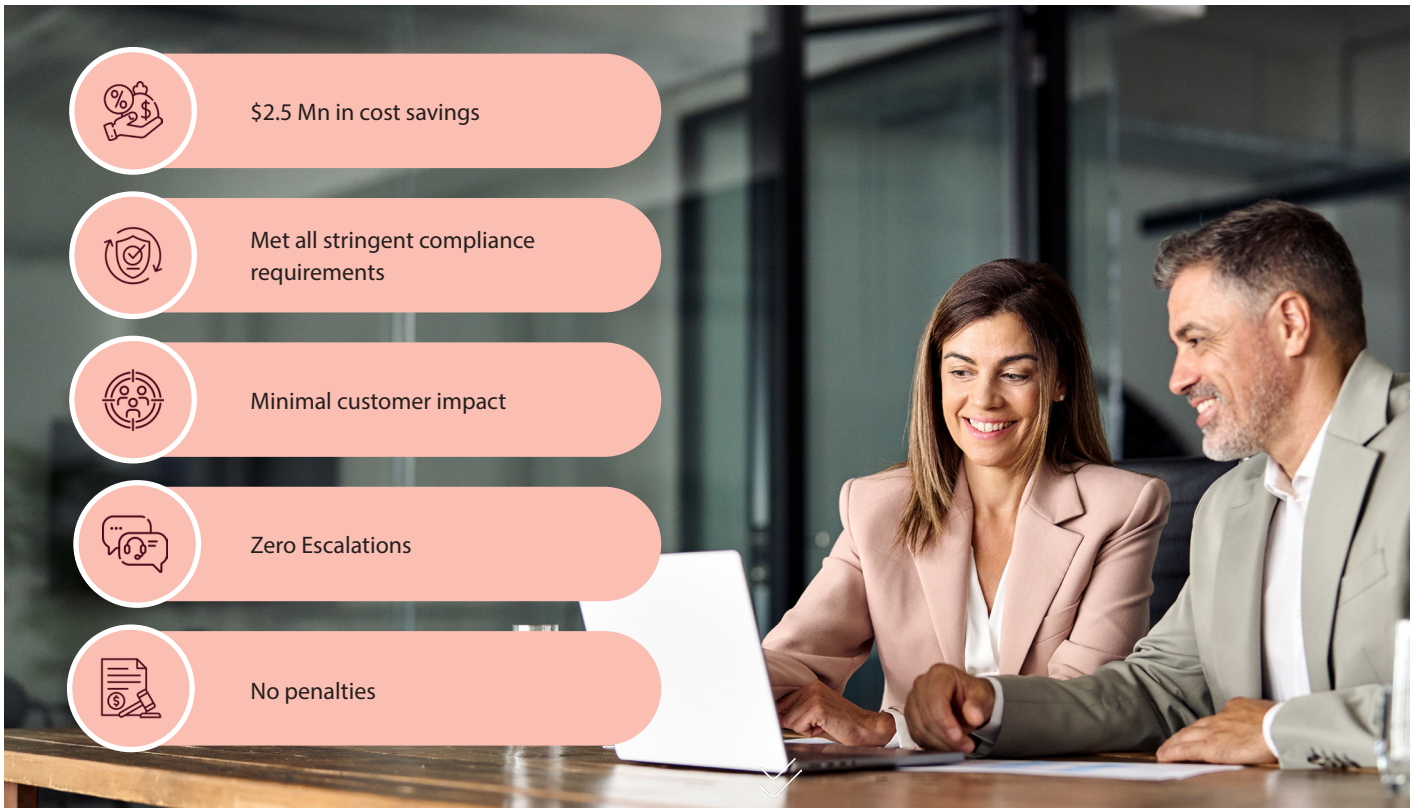
Key benefits



Not only did Gowtham and his team clear backlogs without any customer escalations or regulatory issues, but other stakeholders within the client organisation also rated the team's performance highly across all parameters. The success of this project also helped Michael Mahoney gain visibility within the organisation, and he was soon promoted to Senior Director for Business Support.

**Names have been altered to preserve the identities of the people involved.*

For more information, contact infosysbpm@infosys.com

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