

Case Study:

Application Support



CDI reduces level 2 and level 3 annual support costs by an average of 15% per year for three years.

Client Description:

A leading financial planning and services company with more than 12,000 financial advisors and registered representatives that provides solutions for clients' asset accumulation, income management and insurance protection needs.

Background:

Our client, always on the lookout for process improvements, expects its vendors to provide proactive service improvement ideas that reduce costs. In 2005, CDI proposed making substantial changes to the current support model in order to improve the end user experience and save money.

Business Issue:

Our client needed more effective level 2 and level 3 support than its present model to support the 17,000+ Financial Advisors who were managing over \$280 billion in assets. By resolving their complex technology issues more quickly than the existing callback model, the financial advisors could focus more on their core business and clients. Cost reductions were required, and the client wanted to provide the same or better customer service.

The existing technical support model was real-time support from a level 1 perspective and a scheduled appointment model for level 2 support. CDI was the level 2 provider. CDI analyzed the inefficiencies of the scheduled call model and determined the best possible program to provide improved support and reduce costs. We proposed changing the 2nd level support model to real-time level 2 support along with moving the core work to the CDI Cross Lanes facility in West Virginia to provide additional cost relief. We also recommended leaving a small team at the client site to attend project meetings, handle escalations and maintain relationships.

CDI Solution:

CDI provided an operation assessment of the current environment. The output was a process map and operations scorecard which detailed metrics that measured the level of achievement at various points in the process and provided a set of recommendations based on ITIL. We also developed a shared knowledge base for faster support of common issues and to capture feedback for improved quality/reliability of the support model. A majority of the services were transitioned from the customer site to our low-cost center in Cross Lanes. The resulting solution allowed us to manage and support all technology deployments that impacted the financial advisors.

The technical support desk in our West Virginia facility provided live, real-time technical support for all off-the-shelf applications and proprietary applications developed by the client. This was a significant improvement over the old support model which had 45 support agents completing call-backs to the financial advisors.

Initially, CDI provided 14 agents in our Cross Lanes location and 15 at our client's home office to manage the transition from scheduled call-backs to real-time support for level 2 (West Virginia) and call backs from level 3 (client site). As the team in West Virginia became proficient with the applications, the level 2 desk grew to more than 20 agents and the client site-based support dropped down to 6 agents to handle QA, bridge calls and escalations.

When an upgrade in the core bundle and new releases in applications were introduced, CDI demonstrated its flexible staffing model by staffing up to 30 agents in West Virginia. After the financial advisors were all upgraded to the new software versions, the staff level was readjusted back down to 20.

Other focused support groups have since been established with the client to offer total support of applications.

Results:

CDI currently handles over 6,000 calls a month via real-time level 2 support. SLA's require an average speed-to-answer (ASA) of 20 seconds or less 80% of the time or greater and an abandon rate of 4% or less.

CDI changed the support model in what appeared to the client as a seamless effort. The response from the end users and the client was very positive. The financial advisors had more time to focus on their core business and were able to get their issues fixed without having to tie up their calendar.

CDI accomplished the following:

- Delivered 15% price reduction year-after-year for 3 years
- Improved the support model by providing real-time support for the financial advisors
- 100% of the financial advisor community preferred real-time support from calls they placed to the 2nd level support desk

Technologies Used:

Desktop applications including off-the-shelf as well as proprietary applications developed by and for the client. Client has a Lotus/Domino environment for its email infrastructure, operating systems run Windows XP Professional and Windows Vista Business.