

Case Study:

Application Support



CDI keeps financial advisors running with support for contract management application.

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 encourages its vendors to be proactive in recommending process improvements to drive cost reductions and improve customer service. CDI stepped up when the client decided to upgrade from the old client management system to a new and robust system. All field advisors would need to convert their old databases to the new system.

Business Issue:

The technology upgrade from the desktop-based, client management system to the new, web-based system was to be one of the largest technology roll-outs for the client. Despite having standard internal processes for such projects, the client lacked confidence in their ability to roll-out this new core system which had a zero tolerance for failure.

This project required live, real-time level 1 and level 2 technical support to the field financial advisors and staff across the country for the new application. The client wanted to establish a dedicated support desk to handle any issues pertaining to the application until they were ready for enterprise-wide roll-out, as the plan called for the application to be released to a handful of advisors to beta test with the support desk in place to support the advisors during testing and transition.

CDI Solution:

Recognizing that CDI was a better fit for the support required for the new application roll-out, CDI proactively proposed the dedicated support desk concept and structure and recommended SLA's for a support desk that would provide

level 1 and level 2 System Administration and Conversion support. CDI would have full responsibility and accountability in supporting the roll-out.

The goal was to ensure a very high touch support model to ensure advisor success in moving to the new application. CDI hired the team, provided the training, wrote all knowledge-based articles for the support teams and worked closely with key stakeholders (development, project teams, software vendor and client).

Results:

The CDI Support Team was extremely successful in the implementation and ongoing support of the application. CDI set up the entire support structure, wrote processes, provided Level 1 and Level 2 support for the application and provided training to the other support teams to prepare them for when the application is rolled out enterprise-wide and is added to the usual application suite. The Support Team was able to establish the support desk without any prior knowledge or training on the application from the client.

At its peak, CDI had 16 support staff meeting SLA average speed to answer (ASA) of 20 seconds or less 80% of the time or greater and an abandon rate of 4% or less. Actual weekly call volumes of 1,500 exceeded the pre-project estimate of 1,000 by 50%.

In addition, CDI continually took on more work (roles, administration and contact manager mobile), handled additional tasks and was able to come up with resolutions for some of the issues that the software vendor created and refused to resolve.

Technologies Used:

- Proprietary contact management system
- Internet Explorer 7
- Office 2007
- Microsoft .NET 2.0
- SQL Express 2005