



# Global Investment Bank Case Study

The customer, a Global Investment Bank, draws on its substantial heritage to serve private, institutional and corporate clients worldwide, as well as retail clients. They combine their wealth management, investment banking and asset management businesses to deliver superior financial solutions. They have offices in more than 50 countries, including all major financial centres, and employ approximately 65,000 people. The operational structure of the Group comprises the Corporate Centre and five business divisions.

## In Brief

### Industry

Global Investment Bank

### Challenge

- Cost-Saving
- Automation
- Better Tracking

### Solution

Configured ServiceNow instance with seven different interfaces

### Benefits

- Cost-Savings
- Redeployment of staff
- Confidential Documents stored electronically
- Operations and workflows could be tracked

## What was needed

The customer recognised that there were a number of inefficiencies in the processes they used to support all types of HR requests. There were many different supporting technologies across all geographies, all of which were very costly to maintain. A large proportion of the supporting processes were heavily dependent on human intervention. This caused unpredictable and costly delays to the simplest of HR requests. Working closely with the customer we identified a number of priority areas:

- Users needed different levels of HR advice and service
- Senior executives needed strategic perspective and advice
- Line managers sought effective people management support
- All employees wanted simple, easy access to information and service
- Replace existing fragmented service model did not allow HR to service the business effectively
- Reduce high operating costs and improve inefficient processes



## How we tackled it

Support processes were standardised and often simplified to make the experience better for all. ServiceNow was flexible enough to handle local variations, that were usually driven by legislation in a given region. Automation of key steps in processes was important to success and helped to speed up lead time for requests. The underlying operating cost model was greatly reduced and a significant proportion of the staff were redeployed to other areas.

The platform was deployed within seven months, including testing and user integration. It was custom-designed for seven interfaces: Security, Telephony, Document Management, Document Creation, Reference Management, Business Objects and HR suite. The deployment was in four languages (English, French, German and Italian), with further plans for Mandarin and Japanese. The number of internal HR customers of the investment bank reached 65,000, all with access to the ServiceNow HR Case Management platform with differing permission levels.

Following a defined roadmap, the roll-out was carried out in 3 stages, CH, UK, then US and Asia together.

The ServiceNow instance was custom-designed for seven interfaces: Security, Telephony, Document Management, Document Creation, Reference Management, Business Objects, and HR suite. It was deployed as a case workflow mechanism and interfaced with an Oracle HR backend.

## Business outcomes

The new change process improved customer satisfaction, and delivered easily measurable KPIs for the business (such as case management SLAs). Progress can be tracked, and users are able to check and amend their details and queries all in one interface. These functions include employee workforce administration, queries and issues, knowledge and document management and a service desk.

Further to this:

- ✔ Services currently provided by HR Managers covered through online facilities
- ✔ Online capabilities provide increased availability with faster and easier access to HR knowledge and support
- ✔ Cost base reduced
- ✔ Increased customer satisfaction
- ✔ Confidential Documents stored electronically
- ✔ Operations and workflows could be tracked
- ✔ Self Service for users