

# case study: tier 1 help desk support helps global investment banking firm focus on core activities

## results at a glance:

**Problem:** Managing and operating an internal 24x7x365 Tier 1 help desk to support their customers having problems using online account access was time consuming and distracting. Additionally, accommodating the increased call volumes during tax season required staffing flexibility, training, and Quality Assurance programs the firm wasn't well suited to handle.

**Solution:** A number of financial institutions of all sizes have turned to Randstad Technologies to provide high quality, reliable outsourced Tier 1 help desk support. By providing this service to a number of financial institutions, Randstad Technologies leverages economies of scale to provide higher levels of service than feasible for an individual firm.

**Results:** The client's IT staff is now free to focus on core activities that support business goals. Help calls are answered quickly and the call abandonment rate is miniscule. The firm doesn't have to incur the costs associated with staying current with multiple operating systems and Internet browsers.

## client profile:

This global investment banking firm, originally established in the late 18th century, is one of the oldest, continuously operating financial institutions in the world. Headquartered in New York City, the firm has offices in 36 countries and employs nearly 50,000 people. In the U.S. alone, it has \$1.3 trillion under management. The firm has been a Randstad Technologies client for over a decade.

## business problem:

Providing online access to information about one's account and the ability to perform certain transactions has become a basic requirement of all financial institutions. One of the issues that invariably arises is that some the users of their online banking website lack the computer knowledge and skills needed to perform certain web-based tasks. Online banking users sometime run into trouble that prevents them from accomplishing what they set out to do. It is the job of the Tier 1 help desk staff to come to the rescue when a caller, who could be a member of the public, a stockholder, or an employee, encounters a problem when using the online account information and management site.

Operating and managing a Tier 1 help desk requires enough analysts with basic, but wide ranging knowledge of everything from resetting PINs to knowing how the different Internet browsers work. And you have to have enough of these people working the help desk to meet the anticipated numbers of frustrated users around the clock, seven days a week. For this large financial services client help calls run around 1,600 a month. During tax season, this number almost doubles. Scaling an internal help desk team is no easy task. Attracting qualified people and providing them with training on how to use the system and the knowledge they will need to address user problems are difficult issues to address. Quality Assurance processes also

have to be scalable to accommodate the growth in staff. And for the client these are temporary employees. At the end of tax season, these positions will be eliminated — until the following year.

Managing and operating a Tier 1 help desk was taking an inordinate amount of time and distracting IT personnel from core activities.

**the Randstad Technologies solution:**

Because the users of financial institution online services generally have the same types of problems, Randstad Technologies has configured a reliable and affordable approach to provide highly personal, around-the-clock Tier 1 help desk support to financial institution customers. By using an offsite location to house a team of Tier 1 help desk analysts to field all the calls from two or more financial institutions, Randstad Technologies can realize economies of scale that the institutional client could never attain. And offer this service at an attractive price.

For this financial institution, the advantage of using a shared team became more apparent during tax time when their call volumes spike. From January through March, support team members are reassigned to focus on the client's increased requirements — without adding and training temps. All Randstad Technologies help desk analysts undergo thorough training, the cost of which is allocated

across a number of clients. Each analyst spends a week with their assigned quality assurance team who provide them initial training on the basic systems — the call center software, trouble ticketing system, etc. After that is completed, they join a team of experienced analysts and receive dedicated one-on-one training from a senior team member. They review the knowledge base, learn different trouble shooting techniques, and get an understanding of the most frequent types of problems that arise. There are “demo” accounts that the trainees can access that simulate common problems pertaining to such issues as slow loading pages, clearing Internet caches, and checking for browser compatibility with the online banking system platform.

Next, they listen to senior team members handle actual trouble calls. Finally, they are put on the firing line with actual callers — with senior analysts monitoring their techniques and offering feedback and help. When they complete their training, they can support long-time computer users — or beginners. And they know that going forward they'll have a team of experienced people they can reach out to for assistance if needed.

The bottom line is that Randstad Technologies help desk analysts can seamlessly handle a variety of trouble calls from a number of financial institution customers — regardless of the specific client — all from one centralized location.

Randstad Technologies also provides the call center infrastructure to ensure reliability. Redundancy is emphasized to avoid outages; therefore, uptime is extremely high. Help desk analysts can work from home if need be with access to the central phone and incident ticketing systems. Backup generators and alternative phone networks add an additional layer to the Randstad Technologies uninterrupted service plan.

**benefits delivered:**

The relationship with this client stretches back over ten years. During this time, the ways people use the Internet and home banking have changed. By using Randstad Technologies for their customer support, this financial institution was somewhat shielded from having to individually absorb all the costs and headaches of adapting to those changes. Randstad Technologies has done the adapting — from dial-up to broadband, Windows XP to Windows 7, the use of the Apple Mac and its browsers, the frequent updates of popular Windows-based browsers, to the changes now wrought by mobile access.

The Randstad Technologies support teams maintain close coordination with the client's IT staff so that the two are in sync and have the appropriate processes in place when home banking applications are modified or upgraded.

All incidents result in a trouble ticket, which allows for problem tracking. Incident resolution descriptions become part of a knowledge base, which is a repository for analysts researching specific issues. New troubleshooting steps are updated and circulated throughout the support teams.

The attention to detail, with a focus on training, has resulted in impressive performance metrics: 94% of calls are answered within a 2-minute threshold. Recent call abandonment rates over a 2-minute hold time are running only about 3%.

Perhaps most importantly, IT staff is freed from the daily management and operations of their Tier 1 support desk allowing them to focus on more core activities in support of their broader business goals.



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