

UBI Banca Optimizes Help Desk Management with CA Service Desk Manager



CLIENT PROFILE

Business: Gruppo UBI Banca

Industry: Banking

Total deposits: 89.7 billion euros

Employees: 17,500-plus

BUSINESS

UBI Banca is one of Italy's leading banking groups, made up of eight banks operating through 1,560 branches.

CHALLENGE

UBI Banca wanted to improve help desk efficiency and reduce total cost of ownership (TCO) without changing the company's processes.

SOLUTION

UBI Banca replaced its three existing tools with CA Service Desk Manager, which is today used by 17,000 employees and more than 400 operators and analysts.

BENEFIT

The number of tickets is down by around 10 percent, with quicker response times and lower total cost of ownership.

Business

A large banking group rooted in Italy's most economically dynamic regions

UBI Banca is Italy's fourth biggest bank by direct income and the third by market capitalization. The company has a market share of over five percent and operates through 1,560 branches located mainly in the wealthiest regions of the country, with more than 17,500 employees.

Gruppo UBI Banca – listed on the Milan stock exchange and part of the FTSE/MIB index – was created on April 1, 2007 by the merger of BPU (Banche Popolari Unite) and Banca Lombarda e Piemontese. The parent company controls eight regional banks (Banca Popolare di Bergamo, Banco di Brescia, Banca Popolare Commercio e Industria, Banca Regionale Europea, Banca Popolare di Ancona, Banca Carime, Banca di Valle Camonica, IWBank Private Investment), alongside specialist organisations for asset management, factoring, leasing and insurance.

Challenge

Improving help desk efficiency for employees

UBI Banca has always relied heavily on a help desk for incident management to answer employees' requests for assistance in solving problems, and for change management when changes to company processes are proposed. Since 2006, the bank has used an IT solution to manage five types of requests for help. The services managed through the help desk include three areas of technical support (IT systems, building maintenance and physical security systems such as revolving doors, alarms and vaults), back office administration (for example, changes to the personal details of account holders) and advice provided by the group's legal offices.

The original help desk was based on three different software tools, partly bought-in and partly developed in-house. In 2014 UBI Banca decided to rationalize these platforms into a single more efficient solution.

"The old solution had limited functionality due to its age and the numerous layers of changes and customizations," explains Ivan Carminati, Head of the Application Support Group, Architecture & Innovation, UBI Systems and Services. "We needed a new integrated solution based on a self-service approach that would allow users to find solutions to the most common problems and reduce the number of tickets and queries. A further goal of the project was to reduce the solution's total cost of ownership. Repeated customizations had made it extremely time-consuming and costly to update the old systems."

The main project constraint was the need to minimize disruption to company processes. "For change management, in particular, we had to replicate the existing rules as the multiple authorization procedures involving numerous people would make any change to processes extremely complex," explains Carminati.

Solution

Efficient help desk management
without changing company processes

“CA Service Desk
Manager has
been configured
and implemented
to meet our
needs perfectly.”

Ivan Carminati

Head of the Application Support
Group, Architecture & Innovation,
UBI Systems and Services

UBI Banca analysed the leading help desk query lifecycle management solutions on the market and chose CA Service Desk Manager. “We opted for the CA Technologies solution for three main reasons,” says Carminati. “In the first place the solution’s flexibility allowed us to adapt it to our existing processes. Our financial analysis also showed that CA Service Desk Manager solution would deliver lower total cost of ownership. Finally, the third decisive factor was the longstanding and consolidated relationship of trust with CA Technologies, as the company has supplied UBI Banca with software solutions for more than 20 years.”

CA Services helped to customize CA Service Desk Manager to ensure that the bank’s change management procedures remained unchanged. “The CA Services team’s specialist skills were fundamental to the success of the project,” comments Carminati.

The flexibility of the CA Technologies solution also enabled UBI Banca to keep its existing dashboards and develop a series of customized reports.

Implementation was carried out in two phases: the first, which focused on incident management, was activated gradually during 2015, while the second, which focused on change management, was completed in the first months of 2016.

The new solution based on CA Service Desk Manager is now used by all 17,500 UBI Banca employees. The 400 operators and analysts responsible for answering users’ requests are organized into five service groups.

Benefit

Decreased ticket operations
and increased cost control

Only a few months after going live, CA Service Desk Manager has more than met expectations. “Following a brief trial period, everyone is now very happy with the solution, including the users requesting assistance and the operators who provide it,” says Carminati.

“The tool provides a unified portal in which users can find help with all known problems. It features an FAQ (frequently asked questions) section that covers many of their queries and often provides an immediate answer. As a result we have seen a 10 percent fall in the number of enquiries for help,” states Carminati. “This means that we can improve the quality of service without adding head count.”

“In addition, CA Service Desk Manager lets us include obligatory fields for each type of request so that the analysts have all the information they need to answer it from the outset. For example, any back office request to change personal details must include a copy of the customer’s ID card and the necessary authorisations, and a printer repair request must include the machine’s serial number. This means we waste less time and can respond to requests more quickly.”

Disposing of the old software has also enabled UBI Banca to reduce total cost of ownership for the help desk management solution. “We now have a single standardized tool, which means it will be cheaper to make any future modifications,” added Carminati.

By adopting CA Service Desk Manager, Gruppo UBI Banca has been able to:

- Improve help desk services
- Reduce IT costs
- Optimize resources.

The company now intends to evaluate upgrading to the new product release and implementing potential improvements based on operators' suggestions. "CA Service Desk Manager has been configured and implemented to meet our help desk management needs perfectly," concluded Carminati.



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