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## HARRIS BANK

# Case Study

### *Conversion Methodology Design*

*“Harris is extremely satisfied with the work that ADS has done on this initiative. The team is to be congratulated for over-delivery.”*

ADS Financial Services Solutions is a strategy consulting and systems integration firm dedicated to serving the needs of the financial services industry. ADS offers rapid, cost effective solutions to its clients’ business challenges through its in-depth financial industry expertise, project management expertise, and technology expertise.

#### CLIENT

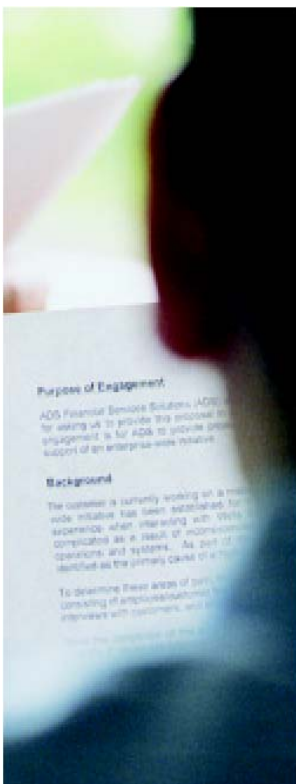
Harris Bank, with \$28 billion in assets, has one of the largest community bank networks in Illinois and is a nationally recognized provider of private client and personal trust services and a premier Midwest mid-market corporate bank. As a member of the Bank of Montreal Group of Companies, Harris offers its clients the range of services and depth of expertise of one of the largest financial institutions in North America.

#### SITUATION

Bank of Montreal outlined a broad expansion plan for the U.S. market emphasizing bank acquisitions to build its presence in the retail, commercial, investment banking and private client services sectors. The growth would be aggressive, but selective, and while interested in deals of all sizes, Harris would only entertain very large transactions. Harris’ experience in converting previous acquisitions had left management with the challenge of improving the quality of its conversion processes, and establishing a model for consistent consecutive conversions to meet the new growth strategy.

#### CHALLENGE

Harris Bank was faced with the challenge of documenting and formalizing a conversion methodology that could optimize conversion project investments and enable the bank to execute conversions with minimal risk in support of corporate strategies and the growth objectives of the organization.



## HARRIS BANK *(continued)*

*“We have been so impressed with the talent of the ADS team. Thanks for a job well done”.*

### APPROACH

ADS performed an assessment of the methodologies used by Harris to govern conversion activities and compared them to Industry Best Practices and the processes and procedures in the ADS methodology. Based on this review, a conversion methodology tailored to the specific needs of the bank was developed. ADS also introduced its proprietary Conversion Productivity Tool (CPT) to facilitate the automation of key aspects of the data conversion process.

### RESULT

The introduction of CPT and the comprehensive Data Conversion Methodology developed for Harris provided the framework for establishing an ongoing process to conduct data conversions more effectively and with greater efficiency. The methodology developed for Harris includes the following components:

- Process descriptions defining key conversion processes which included overall proof and control, testing for batch vs. online systems, and establishing a command center
- Tool usage including an issues database, contact trees, and a central documentation repository
- Roles and responsibilities for all Harris departments and service providers
- Result expectations from key activities including proof and reconciliation sign-off sheets, and installation acceptance documentation
- Templates to facilitate the data gathering and analysis process including file request forms, data mapping layouts, and application proof
- Reporting requirements to monitor the performance of the conversion activities
- Project governance and Expansion Services Office integration

### BENEFITS REALIZED

The Data Conversion Methodology developed for the bank, in conjunction with the introduction of CPT, provided Harris Bank with a more disciplined, consistent, efficient, and cost effective approach to address the data related aspects of data conversion and integration projects. This not only supports Harris' centralized operating model, but also has effectively achieved the goal of being prepared to support the ongoing growth strategy of the bank.

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