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ABN AMRO NORTH AMERICA

Case Study

TouchPoint Assessment

"We need a call center subject matter expert to provide a gap analysis of operational efficiencies and a high-level review of current technology / infrastructure with recommendations of areas for improvement."

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

Netherlands-based ABN AMRO is one of the world's largest banks, with a presence in more than 3,400 locations in over 60 countries and territories. ABN AMRO North America, Inc. is headquartered in Chicago and has approximately \$90 billion in assets with subsidiaries including LaSalle Bank in Illinois, and Standard Federal Bank in Michigan.

SITUATION

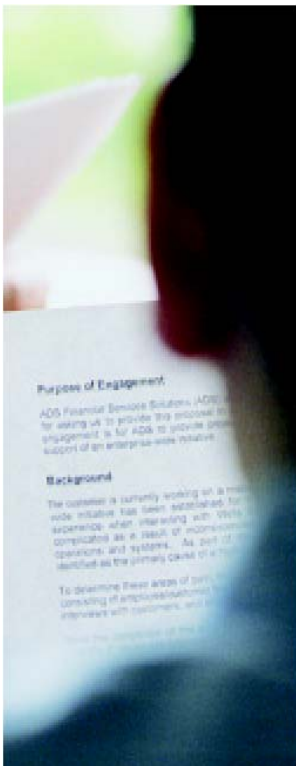
The Retail Sales and Services Support (RSSS) division within ABN AMRO focuses on incentive compensation plan design, tracking and measurement of key performance indicators (KPI) and performance to incentive. The team's role is to assist in the local market management planning process, which is a process to bring learning and understanding to the market (branch) level. This is accomplished by helping the branches understand what their markets look like in terms of customer makeup, demographics and psychographics

RSSS identified the need to improve support of the organization's sales management initiatives. In particular, they were looking for a more sophisticated tool to assist in the sales planning process across all LaSalle Bank Corporation branches by expanding their ability to plan and execute campaigns through improved customer profiling, targeting opportunities, and assisting in the creation and execution of action plans (strategies, activities and tactics).

After performing due diligence and going through their standard RFP process, RSSS selected Fidelity Information Services' TouchPoint Solution to meet their sales planning and management needs. This browser-based solution was expected to automate the entire process of building market plans. It would help branch management manage local markets and branch efforts by identifying goals, building campaigns, and applying marketing tactics to each prospect/customer for the purpose of selling, cross-selling, customer retention and acquisition cost management.

CHALLENGE

While the intent of these requirements was straightforward, and there was an up front understanding that a development effort was required in order to expand the functionality of the TouchPoint application, the development and execution created a growing level of concern within ABN AMRO.



ABN AMRO NORTH AMERICA *(continued)*

Some of the issues that led to this concern included:

- Unacceptable Response Time and System Freezes which resulted in ABN AMRO suspending all use of the TouchPoint application in the branches.
- Inability of the TouchPoint software to support the business needs of the users
- Difficulty in application navigation, cumbersome to use, and hard to determine the application process flow.
- Little to no integration between the branch automation system Mosaic and the TouchPoint application, resulting in the very time consuming task of data re-entry.
- Lack of quality processes for synchronizing information added to the TouchPoint application with the database after monthly refreshes.

Due to these issues, there existed a general feeling across the branch network and within operations that although the idea behind TouchPoint was very good, the issues far outweigh the benefits and it has been proven that the functions can just as easily be performed manually without TouchPoint.

APPROACH

ADS provided an experienced consultant to perform an assessment of the current environment. In order to establish an understanding of current capabilities, ADS interviewed the ABN AMRO business sponsor, key stakeholders, and numerous ABN AMRO users, technologists, support personnel, as well as the TouchPoint vendor. The goal was to develop a clear understanding of the environment, the current status of the TouchPoint implementation, and the perspective and personal feelings the users and team members have as it relates to the application.

ADS also participated in detailed discussion regarding how specific business functions were supposed to operate and how TouchPoint handled them. ADS reviewed numerous documents, received demonstrations on the TouchPoint systems, and performed a review of the overall TouchPoint operation and process.

RESULT

Based on interviews, observations and a detailed analysis of the information, ADS provided a comprehensive Report of Findings. This report categorized and prioritized the findings in 4 major areas including application, data, technology and management. With each finding, ADS provided recommendations and also included the benefits that would be realized should ABN AMRO implement the recommendation as well as the risks should they decide not to perform the recommendation.

BENEFITS REALIZED

The Report of Findings identified the issues/gaps and recommendations that will assist ABN AMRO management in setting future direction for the TouchPoint implementation. Management can take these recommendations, create high-level tactical plan for remediation, and create both the short term and long term plan implementation plans for this application.

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