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BISYS

Case Study

Branch Platform, Teller & CRM Implementation

"ADS provides the project management services for the implementation of the Siebel CRM system into the BISYS client banks."

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

BISYS is a leading financial services company providing processing services for approximately 450 banks and thrifts throughout the United States. The asset size of BISYS client banks range from less than \$100 million up to \$10 billion.

SITUATION

The BISYS Platform and Teller software systems used DOS-based software. In order to upgrade their client offerings, a major project was initiated to replace these systems on new platforms using Windows-based software. Platforms selected by BISYS to accomplish the upgrade included the Siebel CRM system, with the goal of integrating new account opening functionality into the system and the integration of Zeus Teller software from S1 with the BISYS host applications.

CHALLENGE

BISYS developed an aggressive plan to implement these new software solutions in their client banks and looked to ADS to develop the project structure, required tools and plans, as well as to manage the actual implementations. The timeline required multiple implementations to occur concurrently with the assurance that all milestone dates would be met with high quality standards. In addition, BISYS perceived that clients would need guidance and direction regarding the implementation of specific modules to best meet their needs and business objectives.



“We would recommend ADS to any of our client banks that expressed a need for any additional services.”

APPROACH

ADS developed a standardized Scope Assessment process that included interviews of key client management staff and stakeholders, and the production of a Report of Findings for presentation to client executive management outlining the scope of the implementation effort.

For the implementation phase, ADS established a process which included a kickoff meeting at the client site to introduce and review the project management methodology to be used, establish the project infrastructure, and review all major project milestones and processes. The project milestones and processes are based on a standard project plan and schedule that is subsequently tailored to meet the specific needs and circumstances of each client. In addition, ADS facilitated weekly project status meetings and coordinates all activities and tasks to ensure that the project progresses on schedule and that all project objectives are met.

RESULT

The methods and processes developed by ADS were proven during a successful beta implementation and several other successful implementations. As a result of these implementations, ADS was asked to assume leadership over a failed implementation that had been attempted prior to ADS involvement and was subsequently concluded successfully. In addition, ADS has developed a number of tools, methods, and techniques for clients to use in critical tasks such as file cleanup. The processes developed and deployed by ADS have been refined to the point where over twelve client implementations have occurred simultaneously.

BENEFITS REALIZED

The efforts of ADS have provided BISYS client banks with world-class CRM tools and Windows-based branch software solutions at a fraction of the cost available from other sources. In addition, BISYS has been able to increase revenue while meeting the needs of its clients as a result of the timely and successful implementations managed by ADS.

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