

CASE STUDY

Top 3 UK Bank Migration Project

happiness made easy[®]



What is MATS?

MATS[®] (Multi Application Tracking System) is used by some of the world's biggest companies to join-up workflow, stakeholder communications and real-time performance monitoring.

It is a web-based, managed service that delivers rapid and substantial return on investment through increased profitability, efficiency gains and improved customer experience and satisfaction.

The need

In 2011, under a European Commission ruling, a top 3 UK bank was required to sell over 300 of its branches. The sale to another bank included the transfer of over 1.8 million customer accounts and 240,000 corporate clients.

The deadline to complete the project was incredibly short and a solution had to be found quickly.

A newly designed process and related technology was needed to enable Relationship Managers (RM's) to manage their customers migration efficiently, with all the appropriate governance and control in place.

The bank's already busy IT team evaluated the project and although they provided options, they were based on custom-built databases and spread sheets. Taking significant time and resource to create and implement, the proposed solution would miss out key features such as customer communications and Management

Information and would have missed the migration deadline.

The solution

MatsSoft already provided the bank with a range of solutions to manage workflow, customer and third party communications and automated reporting, for a number of its business units.

MatsSoft was invited to discuss the Migration project and a solution was delivered that met all functional and business requirements well within the budget. This approach rapidly secured senior stakeholder buy-in.

MatsSoft configured its MATS[®] (Multi Application Tracking System), completed User Acceptance Testing, passed Penetration Testing and security audits by the bank and launched within just 6 weeks.

The system was very well received by management, change managers and Relationship Managers.

The results

By using MATS[®] the bank was able to track every step of the process for every customer case, automatically communicate to the RMs when they had a particular task to perform, communicate key messages to the customer during the whole process and track completions.

The business was able to view the performance of the project in real-time through the comprehensive Management Information reporting suite.

Due to the success of the project, a further Migration wave was planned and implemented, again within budget and deadline.

The solution provided

- **Significant cost reduction by using well established technology**
- **High satisfaction levels from customers**
- **Total process transparency**
- **Audit trails for all activity by processing staff and Relationship Managers**
- **Built in governance**
- **Real-time reporting**
- **Real-time communications by SMS, Email and Web**