



## TOWARD GLOBAL CONSISTENCY: CONSOLIDATING THE NORTH AMERICAN COMMUNICATION ENVIRONMENT

**INDUSTRY:** Financial Services

**EMPLOYEES:** over 12,000

**LOCATIONS:** over 70 sites  
across the world

Touchbase's client is a global provider of banking, financial, advisory, investment and funds management services. Its main business focus is making returns by providing a diversified range of services to institutional, corporate and retail clients around the world.

The company employs over 12,000 people and has assets under management of over \$200 billion. The Financial Services Company operates across the world in more than 70 office locations.

Touchbase's engagement with the Financial Services Company began in Australia with the successful design and delivery of a solution which is currently supported and managed through the OPTIMIZE service. The company engaged Touchbase due to the value of having a single point of contact technology services partner with a complimentary global footprint. This led to the opportunity for Touchbase to add value to its North American operations.

Touchbase has since been working closely with its client to help it create consistent and centrally manageable, national communication environments in both Australia and North America. This is laying the foundation to a consistent global platform to further align with the Financial Services Company's vision for the future and to provide control over how it communicates as an organization.

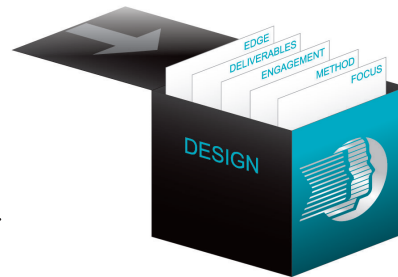
This client story will focus on the engagement in North America. This ongoing engagement began with Touchbase reconfiguring an existing Cisco communication system that was part of an organization (with around 400 people in 4 locations) which it had acquired. This project initiated discussion around how the North American communication environment could be improved to further enable the Financial Services Company's ongoing strategy of aligning technology to business objectives.



"The company engaged Touchbase due to the value of having a single point of contact technology services partner with a complimentary global footprint"

# DESIGN SERVICE

## FINANCIAL SERVICES COMPANY



### FOCUS

Touchbase engaged with the Internal Technology Team (ITT) which operates as a separate business unit within the Financial Services Company, delivering its services on a per user/per month basis. ITT is constantly on top of what's happening within business transforming technology in order to consistently deliver to its 'client'; the business itself. Its key areas of focus are –

- Enabling a positive experience of technology for people of the business
- Giving people of the business the most productivity enhancing tools available
- Managing risk of technology adoption
- Maintaining control over the communication environment
- Efficient financial management

Continued investment in technology is fundamental to the Financial Services Company's strategy and is critical to support daily operations. In addition, technology is key to product and service differentiation in the financial services market. As part of its focus on the above areas it engaged Touchbase to design a North America-wide solution to strengthen the current communication environment and deliver specific outcomes –

- A consistent platform on which business enabling and enhancing applications can be integrated across all locations
- Enable the company's people, business partners, and customers to connect in real time and conduct business across multiple work spaces
- Accelerate decision making and customer service cycles
- Increase productivity through embedding communication technology into work flows business processes
- Improve efficiency by simplifying the technology landscape
- Improve visibility of people's availability for various methods of communication and allow flexibility (within corporate standards) in what methods of communication people use

"The DESIGN concept was built in order to clearly delineate the vision for the new communication environment"

### THE METHOD

A Touchbase Solution Architect and a Project Manager worked with the IT Director and his team to produce a Solution Overview Document detailing the outcomes from the following process:

#### DESIGN Concept

In this phase the DESIGN concept was built in order to clearly delineate the vision for the new communication environment:

#### PHASE 1 – Core Telephony Cluster

DELIVERABLE	HIGH LEVEL BENEFIT
<ul style="list-style-type: none"> <li>• Creation of a single voice cluster across four US locations (inc. a data center)</li> </ul>	<ul style="list-style-type: none"> <li>• All users will also be on the same system and thus able to search for their colleagues extension numbers on a single shared directory</li> <li>• Builds in multiple points of resilience into voice infrastructure</li> </ul>

#### PHASE 1 (Contd.) – Core Telephony Cluster

DELIVERABLE	HIGH LEVEL BENEFIT
<ul style="list-style-type: none"> <li>• Cisco IP Telephony and Unity Unified deployment for the HQ and three more locations</li> </ul>	<ul style="list-style-type: none"> <li>• Efficiency and productivity gains to users through telephony feature enhancements</li> <li>• Removal of legacy system and its associated risks</li> </ul>
<ul style="list-style-type: none"> <li>• Cisco Unified Contact Center Express (UCCX) for ITT helpdesk</li> </ul>	<ul style="list-style-type: none"> <li>• Enhances the experience of the company's users contacting their helpdesk</li> </ul>
<ul style="list-style-type: none"> <li>• The platform to build a centralized North American voice network</li> </ul>	<ul style="list-style-type: none"> <li>• Prepares the technology infrastructure for Phase 2</li> <li>• Provides test environment to evaluate migration of further locations into consistent technology landscape</li> </ul>

#### PHASE 2 – Integration of further locations into core cluster & addition of three further clusters

DELIVERABLE	HIGH LEVEL BENEFIT
<ul style="list-style-type: none"> <li>• Further 3 clusters in major North American cities</li> </ul>	<ul style="list-style-type: none"> <li>• Provide greater resiliency &amp; scalability</li> <li>• More effective load balancing due to number of people in particular regions</li> </ul>
<ul style="list-style-type: none"> <li>• Integration of further locations</li> </ul>	<ul style="list-style-type: none"> <li>• Provides consistent devices and applications</li> </ul>

#### PHASE 3 – Improving Collaboration across North America

DELIVERABLE	HIGH LEVEL BENEFIT
<ul style="list-style-type: none"> <li>• Consolidation of the North American Unity Messaging systems in line with the MS Exchange environment</li> </ul>	<ul style="list-style-type: none"> <li>• Reducing complexity, administrative overheads and building increased resilience</li> <li>• Simple user management of messages</li> </ul>
<ul style="list-style-type: none"> <li>• Integration of Cisco Unified Presence into Microsoft Office Communicator</li> </ul>	<ul style="list-style-type: none"> <li>• Single desktop interface for communication for users worldwide</li> <li>• Instant visibility of the availability of brokers to expedite transactions</li> </ul>

#### Further opportunities identified with DESIGN service

DELIVERABLE	HIGH LEVEL BENEFIT
<ul style="list-style-type: none"> <li>• DISCOVER service for contact center with 50 agents across multiple locations</li> </ul>	<ul style="list-style-type: none"> <li>• Investigate and analyze the technology landscape and business processes of the contact center and provide a clear picture of how its technology is aligned to business objectives and recommend a clear path to bettering this</li> </ul>

#### DESIGN Calculate

The issues dealt with and opportunities presented by new technology were calculated to produce three distinct outcomes from the DESIGN:

##### Business continuity

In the event of a failure of the publisher server, all sites and their users will continue to receive full telephony services through their local subscriber server.

##### Centralization


The clustered servers act as a single virtual system, connected across a QoS-enabled IP WAN. This will create a single system to administer and support, leading to reduced administration time and therefore reduced operational expenses.

##### Unifying the organization

The Financial Services Company's strategy involves the acquisition of companies. A centralized system makes integration fast and consistent with corporate standards. The design foresees growth for the company and has built in scalability and resiliency as a result.

## TECHNOLOGY

The following technology, once implemented and managed, will give the Financial Services Company a global communication platform on which it can rely for its future expansion:



FOUNDATION	COLLABORATION	MOBILITY	CUSTOMER CONTACT
<p><b>IP Telephony</b></p> <ul style="list-style-type: none"> <li>• Cisco Unified Workspace Licenses</li> <li>• Cisco Unified CallManager dispersed/redundant cluster</li> <li>• Cisco IP Phones</li> <li>• 16 additional SRST locations</li> <li>• 3 further stand alone Cisco Unified CallManager clusters</li> </ul>	<p><b>Unified Client</b></p> <ul style="list-style-type: none"> <li>• CUPS (Cisco Unified Presence Server) integration with MOC (Microsoft Office Communicator)</li> </ul> <p><b>Messaging</b></p> <ul style="list-style-type: none"> <li>• Cisco Unified Unity (fully redundant) for all users</li> </ul>	<p><b>Soft Phone</b></p> <ul style="list-style-type: none"> <li>• Test environment and limited use of IP Communicator</li> </ul> <p><b>Further development</b></p> <ul style="list-style-type: none"> <li>• Single number reach and click-to-dial integration with MOC</li> </ul>	<p><b>Interaction Management</b></p> <ul style="list-style-type: none"> <li>• 15 agent Cisco Unified Contact Center Express for internal IT support</li> </ul>
<p>“A solid technology platform on which tailored applications can be applied across the world to improve a number of imperative business factors”</p>			
<p><b>Integration with:</b></p> <ul style="list-style-type: none"> <li>• Nortel PBX (until transition to Cisco complete)</li> <li>• BT Dealer Board Turrets</li> </ul>			

## PRINCIPLES ALIGNED TO FINANCIAL SERVICES COMPANY



<p><b>COVERAGE</b></p> <p>• A partner matching its global coverage is necessary for the client to enable it to have a single point of contact and a consistent method of implementing solutions for all locations. This complete North American DESIGN was instigated by a prior solution for locations across Australia. These two initiatives have laid the foundation for a globally consistent communication environment.</p>	<p><b>CAPABILITY</b></p> <p>• This company is a leading and respected financial institution. It had to ensure that, in selecting a partner to align with its internal and external communication technology needs, it was selecting a company matched to its ambitions and quality. Touchbase top-level accreditations strengthen the confidence in this match.</p>	<p><b>CONSISTENCY</b></p> <p>• This client appreciates the consistent engagement model. Touchbase employs across Asia, Australasia, Europe and North America. Touchbase uses this structure to provide depth, speed and flexibility to projects carried out in North America and Australia with a view to future global consistency for the company's communication environment.</p>	<p><b>CULTURE</b></p> <p>• Touchbase's people are focused on doing what is needed in order to help the Financial Services Company retain its leadership in the global market.</p>	<p><b>CLIENTS</b></p> <p>• Touchbase has a record working with some of the most well respected financial institutions. This knowledge and experience has been transferred into the DESIGN, providing its client with a template for a solid technology platform on which tailored applications can be applied across the world to improve a number of imperative business factors.</p>
---	---	--	---	--



# DELIVERING COMPETITIVE EDGE

---

"As the company continues to expand there is increased technology activity globally. The strategic vision is to deliver leading-edge technology that is integral to the Financial Services Company's growing success"

## VISION

The Internal Technology Team is responsible for the management of the Financial Services Company's global technology infrastructure, the support and development of existing business systems, and the delivery and deployment of new systems, technologies and services. Each of the company's business groups have a dedicated IT team partnering with them to understand their specific technology needs and to provide innovative and effective solutions. As the company continues to expand, there is increased technology activity globally. The internal technology team's strategic vision is to deliver leading-edge technology that is integral to the Financial Services Company's growth and success. Behind this is the fundamental need to provide a consistent platform to allow easier integration and management of the communication environment globally and to provide specific productivity enhancing applications on top of this. The DESIGN service layed out the path to achieve this.

## EXPERIENCE

This DESIGN envisions the experience of communication improving significantly through various feature enhancements and functionality. For example through the integration of Cisco Unified Client and Microsoft Office Communicator the features of Cisco Unified CallManager can be extended. In practice this means only one call control application is needed from the desktop or mobile workspace, with one-click calling to colleagues. It also provides people's presence status allowing visibility of communication methods open to the user. The experience for the internal technology team will improve through the designed environment due to the more intelligent structure of the system and the removal of frustration and uncertainty caused by managing disparate legacy systems world-wide.

## INTELLIGENCE

Speed of information flow is paramount for the Financial Services Company. It is essential that people and teams have the opportunity to communicate with each other and have the advanced tools to do this with flexibility and precision. With an intelligently designed and delivered communication platform Touchbase's client has the opportunity to deliver business enhancing applications into the long-term future. The system will become more efficiently designed with new office locations able to be integrated into the standardized environment.

## CONTROL

This solution places control of how the company communicates into the hands of the company's internal technology team where previously disparate systems had to be handled through different procedures and protocols.

## COST

By consolidating each location's communication systems waste on short-term solutions has been eradicated. With this platform cost is more visible and can hence be controlled more effectively.

Touchbase exists to maximize the positive impact communication technology can have on a company's people, teams and customers.

We do this across the world through four defined services that are used by our clients depending on what unique needs, issues and opportunities they have.

The focus is always on giving our clients a competitive edge through their use of efficient and effective communication.

[www.touchbaseglobal.com](http://www.touchbaseglobal.com) | [info@touchbaseglobal.com](mailto:info@touchbaseglobal.com)

TOUCHBASE: OPTIMIZING BUSINESS COMMUNICATION