



Streamlining the sale of bank branches with MATS[®]

- Solution implemented in just six weeks
- Streamlined processes, work allocation and customer communication
- Audit trail and governance obligations met
- Comprehensive reporting / MI enabled management to monitor the migration project in real time

Significant cost reduction by
using well-established technology

High satisfaction levels from
customers



▶ Total process transparency - implemented in just six weeks.

CHALLENGE

In 2011, under a European Commission ruling, a top 3 UK Bank was required to sell over 300 of its branches. The sale 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.

Accounts had to be selected, prepared and when ready transferred to a new banking platform. Customers needed to be consulted and informed each step of the way. A bespoke process solution was needed to enable Relationship Managers to manage their customers' migration efficiently, with all the appropriate task management, governance and communication in place.

The Bank's already busy IT team proposed a partial solution, involving custom-built databases and spreadsheets. However, their proposed solution lacked key capabilities such as automated customer communications and real-time management information. Development would in any case have missed the migration deadline.

SOLUTION

The Bank already had a number of process solutions implemented on the MATS platform to manage workflow, customer communications and automated reporting.

When the MATS team was asked to evaluate the Migration project, it became obvious that a full solution could be configured using standard capabilities of the MATS platform.

MATS was selected because it was a trusted process platform within the bank, and because a full solution could be provided within budget and timescale constraints.

The MATS solution was configured and delivered within six weeks, including user acceptance testing, security testing and audit by the Bank. End user feedback was extremely positive, with Change Managers and Relationship Managers saying that the system met their requirements.

RESULTS

By using MATS the Bank was able to: track every step of the process for every customer case; automatically alert Relationship Managers when they had a task to perform; communicate key messages to the customer during the whole process; and track completions.

The bank was able to view the performance of the migration project in real-time through a comprehensive suite of management reports.

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

Real-time communications by SMS, Email and Web



MATS[®]

info@matsoft.com
www.matsoft.com
+44 (0)1234 581003
+1 (800) 407 1920