



Corporate Headquarters
501 Congressional Blvd., Suite 250
Carmel, IN 46032
Telephone 317.571.6838
Toll-free 888.775.3778



One of the Nation's Largest Banks

Corporate Merger Collaboration Platform

Business Situation:

A large bank was in the midst of a merger. During prior mergers, documents and information were distributed via email, paper, etc. The bank struggled with maintaining control of the latest version – many changes/updates were overwritten and lost. The bank also struggled to maintain control of sensitive information as emails were flying every which way like bullets in the Wild West. They also struggled with providing individual project status updates, rollups to departments, and executive status reports. As if dealing with these issues within a single organization was not challenging enough, the problem was exacerbated by the fact that two distinct organizations (with different governance, culture, standards, etc.) were sharing this information.

Solution Description:

Ambassador created a series of collaboration sites (individual project sites and sub-sites, cross project collaboration sites, and an overall program rollup) where documents and information could be shared, status reported, and the content managed/versioned. We provided a single repository where users could go and have confidence that they were looking at the latest information and know that changes were not lost. The solution created a common environment for the two banks involved in the merger and shifted the focus toward working together instead of cultural, governance or organizational standards issues. Additionally, the solution provided dashboards and roll-ups at multiple levels to enable project teams, project managers, and corporate executives to quickly see the real-time status of the projects.

Technologies Used:

Microsoft Windows SharePoint Services 3.0
Microsoft SQL Server 2005

Benefits/Results:

The primary key success factor was for the merger portal to be easy to use – users must see the benefit and want to use the portal, not be forced to use it. This was applicable to the full spectrum of users – from executives to department heads to project managers to the implementation teams. We exceeded the customer's expectation by creating a user experience that, within two weeks of implementation, enabled over 600 users to actively collaborate and focus on their projects, not on logistics of collaboration. The merger has been a tremendous success, in no small part due to the merger collaboration platform developed by Ambassador Solutions.

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