

## CLIENT SUCCESS STUDY

FINANCIAL SERVICES ENTERPRISE TRANSFORMATION

### TRANSFORMATION BACK ON TRACK

#### The Situation

A mortgage-processing division of a multinational bank was undergoing a major internal 24-36 month Transformation Program. The program had extremely ambitious goals and objectives, unfortunately though, the program was managed almost independently of the day-to-day business.

It became apparent that there had been no root cause analysis to determine barriers to progress or results achievement. Limited project management data was available to determine status on a timely or accurate basis. The program was becoming further and further delayed, and moral was extremely low.

The business case for the program was in jeopardy and the situation had to be turned around!

#### The Challenge

Enormous resource allocation was made to document the work processes, but this was conducted with little or no direct involvement of the employees who did the work. As a result, technology solutions were being developed in a vacuum, without an accurate and thorough understanding of the real business requirements.

Line managers and employees felt as though they were being kept in the dark. This was further aggravated by excessive meetings, which were increasingly viewed as "Meetings, 'bloody' meetings" rather than an opportunity to participate and advance towards the overall Transformation Goal.

#### The Approach

Initially Gordian consultants worked with both line management and the "Transformation Program" team leadership to develop an integrated roadmap.

In order to address both the internal communication problems, as well as solution development delays, a new methodology was developed. This objective was met by creating a framework for identifying and documenting work processes. The methodology ensured that the employees now understood that all aspects of their work was being considered, and that the IT solution developers would actually have documented workflow based on fact, rather than opinion or guess work.

Specific objectives and results were identified and articulated. The accountability for results was then assigned, negotiated and accepted appropriately.

Lastly, basic project scheduling techniques were implemented to ensure that status was monitored and corrective action properly directed as needed.

#### The Results

The roadmap helped the entire organization refocus on the desired outcome of the Transformation Program. With the new clarity of purpose, it quickly became easier to build bridges between Line and Transformation management.

In focusing in on several key process, the program was able to identify some "early adopters" within the origination. This in turn enabled both significant progress to be made in defining the Business Architecture requirements, as well as achieve some "quick-hits" in terms of both Process improvements and Customer Service enhancements.

The approach also improved communication within the organization, and even more importantly, help establish a consistent message to the customers and solution providers.

Overall the Program was able to recover almost 85% of the known schedule slippage.



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**SOLVING YOUR COMPLEX  
BUSINESS PROBLEMS**

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**S T R A T E G Y , T R A N S F O R M A T I O N S &  
P E R F O R M A N C E T U R N A R O U N D S**

**ABOUT GORDIAN TRANSFORMATION PARTNERS**

Gordian Transformation Partners is a boutique management consulting firm that integrates traditional management consulting disciplines with high-impact leadership practices and breakthrough thinking tools for mid-market clients. The result is a powerful consulting process that enables CXO's to solve their toughest business challenges with speed, efficiency, and economy.

Gordian Transformation Partners is headquartered in Atlanta, GA. We draw on the knowledge and experience of our consultants, whose skills span the initial generation of ideas and insights all the way through to detailed implementation. Gordian's consultants have lead transformation and turnaround initiatives for over 500 Global 1000 and mid-market companies in Australia, Belgium, Canada, Cyprus, Denmark, Finland, Hong Kong, Indonesia, Italy, Jamaica, Malaysia, Mexico, the Netherlands, New

Guinea, New Zealand, Norway, Portugal, Singapore, Spain, South Africa, Sweden, Trinidad, the United Kingdom, and the USA.

Gordian's consulting expertise addresses every area of your enterprise, from developing a transformation strategy to make your organization more customer-focused, to optimizing your supply chain investment, with the tools and expertise to help you reach your objectives.

Gordian draws on the knowledge and expertise of our consultants, whose skills span a wider range of capability than many other major consulting firms. The disciplines of Gordian's consulting specialists are underpinned by deep change management experience - managing risk, mobilizing staff and integrating initiatives to deliver sustainable change quickly.

Gordian Transformation Partners assists clients on a wide array of issues and problems, regardless of industry vertical. Gordian's

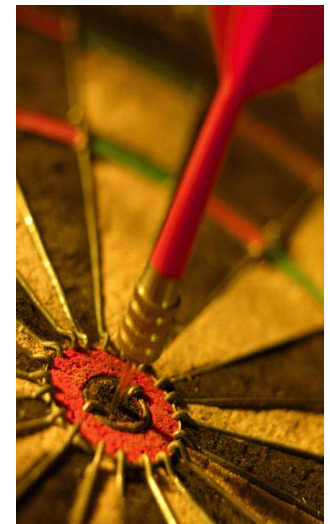
consultants' capabilities have been developed through years of experience creating solutions for the most complex, fundamental problems facing companies today.

Gordian Transformation Partners is focused on what is most important to senior executives and their organization:

- Enterprise Transformation
- Customer Driven Transformation
- Strategy
- Change Management
- Business Process Management
- Performance Turnaround
- Behavioral Development

Gordian Transformation Partners:

- *Help organizations produce extraordinary business results, while connecting and enriching the lives Gordian Transformation Partners touch.*
- *Works in a dynamic team environment, where you and your management team share substantially in the economic value that you help create.*
- *Trains and develops you and your management team, to realize your fullest potential.*
- *Transforms your organization to a collaborative, high-energy, and fulfilling work environment.*



***Is your business on target with your vision and customer expectations?***

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