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Social Media Enables Outlook Migration

Trexin helped a financial services firm implement an enterprise-wide social media site to manage their Outlook migration

Business Driver

A major global financial service firm was migrating 19,000 users from Lotus Notes to Microsoft Outlook. The goal was to minimize calls to the helpdesk from the migration and create a cultural shift toward a self-empowered, community focused workforce. Users at the firm were accustomed to a high degree of individual support from the technology organization, so technology management was looking for creative ways of supporting the transition away from individualized training.

Approach

The Trexin team worked closely with the client to design and build an Outlook Self-Service site that served as the first level of support for the transition. The site was a forum for announcements and alerts, including a community discussion board and knowledge articles. The

community discussion leveraged social media tools and allowed users to like and follow discussions. Additionally, the site displayed most frequently viewed content to allow users to see what content was most popular in real time.

To ensure users engaged in the forum, the team implemented a robust communications plan. The site was featured in weekly firm-wide updates regarding the transition, and support staff were trained to direct users to the site to answer questions.

The financial services firm had specific data security requirements that typically translated in a high degree of governance for the majority of initiatives. Trexin worked closely with the client to find the right degree of governance allowing them to closely monitor the site content, but also enable partners to openly communicate their experiences on the discussion board.

Results

The client embraced the self-service design, and it was quickly expanded to become the servicing solution for all end user infrastructure across North America. It was also leveraged for the client's BlackBerry reclaim project, which led to \$500,000 savings annually through users switching from corporate to personal telephones.

In addition, the site was an integral part to the Outlook Migration, and the community became a forum for users to ask questions and review the questions of other users. It quickly exceeded 200 active discussions with over 350 responses posted. Most importantly, users who had already migrated started sharing tips and replying to questions from new users.

As awareness spread, traffic grew significantly and quadrupled from where it had been during pilot. By the middle of the third month, over 5,250 users have visited the site and viewed an average of 5 pages of the site each. This was twice the amount of users who had even migrated to Outlook at that point and over 25% of the firm.

