



PeoplesBank

» When looking for a help desk solution with enhanced functionality and reporting with superb vendor support, BMC Track-It! fit the bill

BUSINESS CHALLENGE

» Implement a help desk solution that combines increased functionality, quick response time and superior tech support to meet the needs of an expanding community bank

BUSINESS BENEFITS

» More efficiency and faster resolution time
 » Happier management and end users
 » More satisfaction within the IT area
 » Faster workflow and access to data



GEOGRAPHY

North America

INDUSTRY

Financial Services

SOLUTIONS

BMC Track-It!

THE CHALLENGE: FIND A HELP DESK SOLUTION WITH ENHANCED FUNCTIONALITY AND REPORTING WITH SUPERB VENDOR SUPPORT

PeoplesBank operates 16 branches in Western Massachusetts. Its 200 plus employees are tasked with carrying out the motto of the company, which is “Great relationships start here.” To make that a reality, PeoplesBank puts a great deal of emphasis on customer service at their branch locations in addition to phone and internet banking services.

“We have a good mix of internet and brick and mortar capabilities,” said Joe Zazzaro, Vice President of Information Technology. “Many people still prefer to come into the branches because not everyone wants to bank online.”

Zazzaro’s team has as their goal to respond quickly and accurately to user requests and technical support needs to keep the bank running smoothly. “We typically deal with issues such as software problems, password lockouts, printing issues, and network connectivity.”

The connectivity issue carries the most significance in achieving the bank’s goal of maintaining great customer relationships, according to Zazzaro. “From a bank’s perspective, connectivity is key,” said Zazzaro. “Without it, we can’t provide excellent service. Tellers must be able to connect at branch locations any time, and that goes for our online customers as well.”

When problems such as connectivity arise, the company turns to the five person IT team for assistance. “On a normal day, we average 15 to 20 calls,” said Zazzaro. “On a busy day, which is usually the beginning and end of a month when many more people come into the branches, we’ll get 30 or more calls.”

When the bank decided it needed to offer faster response time for IT support requests, and ensure that bank staff had the connectivity, hardware and software performance it needed, Zazzaro began looking to replace its existing help desk system.

“We had a somewhat antiquated system in place,” said Zazzaro, “and it was lacking in three areas. First, it did not offer the functionality we needed to track and respond to help desk requests as quickly as we needed to. Second, it did not allow us to fully inventory all our hardware and software assets and integrate that information into our support process. Finally, the product did not come with the level of support I felt was needed to keep our help desk running at optimal levels.”

THE SOLUTION: REPLACE THE CURRENT SYSTEM WITH BMC TRACK-IT! FOR DRASTICALLY IMPROVED PERFORMANCE

When the time came to find an improved system, Zazzaro, an IT veteran in the financial services field, had only one solution in mind. “I knew the functionality that BMC Track-It! provides from working with it in a previous position,” he said. “I particularly thought that the inventory feature would be very helpful at the bank. What’s more, I had an excellent experience with the BMC Track-It! support team.”

PeoplesBank made the move to BMC Track-It! and has been very pleased with the outcome.

RAPID IMPLEMENTATION TO IMPROVE TIME-TO-PRODUCTIVITY

PeoplesBank wanted to get up and running on the new system quickly, yet implement it in a way that allowed its technicians and users to be comfortable with the new solution. Zazzaro chose a three phase implementation process to install BMC Track-It! on one of the bank’s HP servers.

“First, we started with the inventory feature of BMC Track-It!,” said Zazzaro. “It only took about two weeks to get it up and running, tested and reporting. When we ran our inventory on the bank’s hardware and software, we saw that we were in good shape. There were really no surprises other than a few adjustments we needed to make in software licenses.” Zazzaro feels he now has a solid tool in place for managing his inventory, especially software licenses, to better enable him to manage IT spending and budget more accurately.

“Overall we are very happy with the increase in our efficiency using BMC Track-It!. Especially our ability to integrate hardware and software inventory into one help desk solution. That’s definitely an improvement.”

JOE ZAZZARO
VICE PRESIDENT OF INFORMATION TECHNOLOGY

“Next, we implemented the work order feature, and that also only took about two weeks to implement,” he said. “Finally, we are in the process of implementing a variety of communications features to improve our workflow. We just started with that, but so far the results have been good.”

“Overall the implementation was fast and easy,” said Zazzaro, “and when we did need assistance, the BMC Software tech support people really helped us out.”

MULTIPLE REQUEST OPTIONS THAT IMPROVES WORKFLOW

With BMC Track-It! implemented, PeoplesBank now has several ways for its employees to send work requests to IT. “We have phone support, of course, where the staff can call in and we’ll create a ticket,” said Zazzaro. “But now we also have email support which has made a big difference in our ability to efficiently handle requests.”

When a PeoplesBank employee sends an email to IT, it automatically creates an unassigned work order in BMC Track-It! The IT person in charge that day will review it, and assign it to a tech for immediate resolution. With 16 branches, that may involve a tech jumping in their car to fix a printer or help an employee with a software problem 15 miles away.

“What we love about the solution is that nothing falls through the cracks,” said Zazzaro. “Before BMC Track-It! if an employee emailed in a request, it might go to a tech on vacation, or it might go to the wrong person. With the auto creation of a ticket, it’s logged into the system and we never lose it.”

ACTIVE DIRECTORY INTEGRATION FOR FASTER RESPONSE TIME

Before BMC Track-It!, a tech would waste valuable phone time gaining background information about a user. Now, with active directory integration, the tech is ready to help the user immediately.

“Utilizing our Windows server environment, we were able to import pertinent information about our users into BMC Track-It!,” said Zazzaro. “Now a tech just has to type in an employee’s name, and the work order is automatically populated with their phone, department, location and type of computer they are using. It gets us to issue resolution much faster, and saves the time of not only the tech, but the user.”

Another feature that speeds up the process is the ability to store past resolutions in BMC Track-It! for repeat issues. “We are able to build a solutions database in BMC Track-It! that gives us a reference for the future,” said Zazzaro. “By looking up a past issue resolution we can help a user much faster and get them back working quickly.”

ROBUST REPORTING FOR REGULATORY COMPLIANCE

As a business in a highly regulated industry, PeoplesBank needs to generate a great deal of complex reports. BMC Track-It! gives them the ability to easily extract data for the numerous required reports.

“We are always responding to auditors,” said Zazzaro. “BMC Track-It! allows us to generate the information we need to give to our auditors. It also helps keep the bank in compliance.”

“Reporting is something that BMC Track-It! is great for, and we’re just getting going creating new types of reports,” said Zazzaro. “Currently we run a helpful hardware report which shows all our assets divided by such things as type of system and amount of memory. We plan to roll out reports soon that show our call volume and time to resolution which will be helpful for management review.”

CUSTOMIZATION FEATURES FOR BETTER EASE OF USE

“We really like the flexibility of BMC Track-It! in allowing us to set up the look of the work order the way that suits our requirements,” said Zazzaro. “We are continually implementing new ideas on how to customize it to the needs of PeoplesBank.”

“For example, we went to a Track IT! user group meeting and came away with some ideas we put into place immediately, such as changing the colors on high priority tickets to make them stand out for easy recognition.”

Results: Happier management and users, more satisfied technicians, and faster workflow. Zazzaro reports that the staff at all levels in PeoplesBank have responded favorably to the help desk’s new capabilities. “Management is very happy,” said Zazzaro. “They really feel it was a good purchase and a solid replacement for our previous system.”

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Users seem impressed with the new accuracy of the help desk. "Our employees love the fact that they are automatically notified when a ticket is open and when status changes on their issue," said Zazzaro. "They are happy to be so well-informed. It really makes the IT group look better to them, knowing that we are on top of things."

The techs themselves are also pleased. "My team really likes the improved inventory control," said Zazzaro. "Knowing exactly what hardware and software we have in the bank has streamlined their work and made their jobs more efficient."

Zazzaro says that he seldom has issues with the solution, but when they have arisen, BMC Software tech support is there to help out. "I would say that they are very knowledgeable and they will help you through the issue until completion."

"Overall we are very happy with the increase in our efficiency using BMC Track-It!" said Zazzaro. "Especially our ability to integrate hardware and software inventory into one help desk solution. That's definitely an improvement."

Going forward, Zazzaro intends to investigate other BMC Software modules, such as BMC Remote, while his team continues to mine the solution for better ways to keep the PeoplesBank staff equipped to build and maintain great customer relationships.

ABOUT PEOPLESBANK

PeoplesBank is the largest community bank in Western Massachusetts and has been locally based since 1885. It is a mutually chartered bank driven by the needs of its customers, employees, and the cities and towns of Hampden and Hampshire counties. PeoplesBank takes pride in providing its customers with personal service and attention. Through multiple full-service offices, an independent ATM network and online banking, the bank offers a combination of convenience, personal service, and personal and business banking products to meet the needs of their customers. In addition to its checking, savings, mortgages, and loan products, the bank is expanding its business services.

BUSINESS RUNS ON I.T. I.T. RUNS ON BMC SOFTWARE.

Business runs better when IT runs at its best. That's why more than 25,000 IT organizations — from the Global 100 to the smallest businesses — in over 120 countries rely on BMC Software to manage their business services and applications across distributed, mainframe, virtual and cloud environments. With the leading Business Service Management platform, Cloud Management, and the industry's broadest choice of IT management solutions, BMC helps customers cut costs, reduce risk and achieve business objectives. For the four fiscal quarters ended March 31, 2012, BMC revenue was approximately \$2.2 billion. Visit www.bmc.com for more information.

