

A Service's Digital Transformation: Expanded impact across the enterprise



ABOUT



Academy Bank is a member of the Dickinson Financial Corporation, a major banking institution, headquartered in Kansas City, Missouri. Dickinson Financial Company has assets totaling over \$5 billion dollars and is a holding company for two banking charters including Academy Bank. Dickinson has approximately 100 branches located throughout the United States.



THE CHALLENGE

What started as a project to replace their outdated service management application, became a larger digital transformation impacting how the bank manages service and support across the enterprise.

The initial project was to replace the existing service management application. It was outdated with a confusing user interface, no reporting capability, and no access to historical data. Also, change management, purchasing, workload management and asset management relied on 100% manual processing.

"In our previous environment, 'lost in the shuffle' was a common condition. Our service desk software was extremely limited; our purchasing, change management and asset management processes were largely paper based."

- Dana Hogan, Senior Vice President at Academy Bank

ORGANIZATION



INDUSTRY

Finance/Banking

SOFTWARE

- Point of Business Platform
- Luma Virtual Agent
- Luma Knowledge
- Asset Discovery Expert

BENEFITS

- Support extended across employees and customers
- Case deflections and agent time reduced
- Documented savings of over six figures
- Over 100 Luma skills published
- Improved user satisfaction (CSAT)

Being paper based, the process completely lacked the ability to adequately communicate changes to the necessary parties. People needed to be informed via inter-office communications.

After the implementation of the Point of Business (POB) platform, the project continued to evolve. Addressing end user self-service became an increasing priority. After a period of time, Academy Bank added Luma Virtual Agent to improve self-service and extend availability of support.

Dana Hogan was the driving force behind what became a large digital transformation across service and support. From strategy, the product selection and implementation, to reporting, she challenged Serviceaide to identify areas of opportunity to automate and streamline.



THE SOLUTION

After evaluating a wide range of IT service management solutions, Academy Bank chose POB for its all-inclusive, ITIL-based service management functionality, longevity in the industry, and a knowledgeable staff committed to the success of its business and team. As the requirements grew, the Serviceaide team was chartered with developing a self-serve strategy to meet end user demand; a custom integration with Encompass (an industry standard for loan processing), and further developed POB to extend capabilities in Purchase Management. The team expanded capabilities with a custom built access catalog in Academy Bank's POB environment and are looking to further extend by integrating with their Robotic Process Automation tool to automate simple provisioning requests. They added Luma Virtual Agent to the self-serve, employee portal. Coupled with Luma Knowledge this added another layer of relevant and timely, automated responses to end user queries. A dashboard was built across the broader service management platform to enable tracking business metrics, productivity and savings.



RESULTS - BENEFITS

Serviceaide solutions created a more efficient and productive environment for both IT and end users. POB serves as an easily customizable, low code platform that enables automation, application integration and automated workflows. Key impact:

- POB, Luma Virtual Agent, and Luma Knowledge provided a more comprehensive service management solution with insight into IT staff case load and high-priority cases using key performance indicators (KPI).
- Key metrics include support agent cost per hour, deflected cases, time saving per deflection, and interrupted user minutes.
- Purchasing and asset management was transformed with an automated workflow that supports product requests and warehousing transactions. Approvals, audit tracking, and the ability to interface with the service desk ensures accuracy across all teams.
- Project and change management was improved with enforceable change management standards that eliminate paper-based processes and manual communication, and critical reporting for timely insights.

- Serviceaide solutions improved self-service through the addition of a virtual agent that provides users with a conversational interface to easily find information that is spread out across siloed systems. Serviceaide's scalable solution is flexible enough to expand beyond IT processes and now supports loan processes from the application stage, through the approval process and funding. With 24 x 7 support, the bank saw return in savings over the initial cost of the licenses in just six months.

Academy Bank continues to explore areas where Serviceaide can support service needs across the enterprise such as with Human Resources and other business functions.

“While we started with addressing a specific area, we were able to extend and transform services and support to directly impact our productivity. We are very pleased to utilize a product that has the highest level of certifications from a trusted organization like Pink Elephant,” says Hogan. Serviceaide has given us a broad platform that is flexible, will scale with our business, and allow us to manage all aspects of our IT infrastructure and expand service and support across the enterprise”

- Dana Hogan, Senior Vice President at Academy Bank

About Serviceaide

Serviceaide is a leader in modern service management. Serviceaide's vision is to transform service management, across ITSM, ESM, and Customer Service. Serving customers around the world, Serviceaide applies breakthroughs in artificial intelligence, machine learning, and natural language processing to deliver better experiences, provide enhanced self-service and empower service owners. Serviceaide transforms service through digital labor conversations, automation, and knowledge.