

Recovering Organizational Memory

Profile

A leading financial management and advisory company with offices in 36 countries and total client assets of over \$1.6 trillion (henceforth The Company).

Situation

The Company was moving a \$65 Million-in-annual-revenue line-of-business system from Springfield, MA to Jacksonville, FL in a 30-day period. Almost all organizational memory of its processes was lost as only a single employee remained who was competent on the line of business. The Company needed to produce documentation and support material for 200 critical business processes and develop a new, competent workforce in the transition without loss of revenue or customer service.

Solution

EPSScentral applied PCD and a model-driven content development tool to produce the materials for 200 tasks *in less than two weeks* – and hence the Company was able to produce and maintain a competent workforce for the line of business.

ROI

- All materials developed and delivered in less than two weeks
- Total cost 10% of competition
- No loss /interruption of \$65Million annual business

The Company was moving a legacy line-of-business system from Springfield, MA to Jacksonville, FL over a short one-month period because it was closing the Springfield office. Unfortunately, only one member of the line of business team had agreed to relocate to Jacksonville. While the business line and system were mission-critical, almost all organizational memory was lost as the employees left the company. There remained only one trained employee and no documentation or reference material available to train and maintain a new, competent work team.

The Challenge

The Company needed to create a complete set of process documentation and learning / performance support materials for 200 critical business processes - and do so such that a new staff could be made competent and ready for when the system went live at the new location. All this was to happen without loss of revenue or customer service – in less than one month's time.

Initially two organizations proposed high costs and longer development times than would meet the Company's needs. The proposals received were, respectively, to: (1) complete the materials over a four month period at a cost of \$300,000 and (2) complete a more meager set of materials over eight weeks at \$200,000.

The Solution

EPSScentral produced the documentation and performance support materials for all 200 tasks *in less than two weeks* by capturing key processes from the remaining line-of-business expert using a model-driven content development tool. While the remaining employee was still in Springfield, a single EPSScentral developer sat with her as she stepped through the processes and transactions, capturing each with the model-driven tool over a two day period. Real-time explanations were also captured during the sessions, which informed the reference and performance support materials. A documentation / simulation generator was applied to the captured repository and all materials were produced in less than two weeks.

The Results

All materials were developed and delivered in less than two (2) weeks at a cost equal to approximately ten percent of the competitive bids. Business proceeded uninterrupted – both revenue and customer service – because a new workforce was established and maintained within the required time-frame.

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