

# User Adoption for a Successful Technology Migration



**BRIEF**

Techary were engaged to provide a large international investment bank with a fully-managed User Adoption programme to support the upgrade and migration of approximately 150 trading positions for their London & Dublin offices. A point to note is that the upgrade was required to be delivered to a tight deadline during the height of the second wave of the global COVID-19 pandemic.

Although challenging with the legal restraints and restrictions in force, Techary delivered online virtual training by way of Webex for all home workers, plus full training on client premises for those users working from the office.

All on-site training was fully compliant with the strict PPE procedures in place.

**SOLUTION**

**CO-ORDINATION** 

The client requested that Techary provide a training co-ordinator to assist with the scheduling of all users migrating from both the Dublin and London offices. This role was required to be carried out remotely.

The client required that training was offered to all users from the London and Dublin sites. Marketing emails were sent out a few days in advance of the training week to advertise these sessions. Email notifications were sent out which included the training agenda and the Webex link for joining a session.

Webex links were also dropped into users' calendars as a reminder. The co-ordinator worked closely with business heads to communicate with and encourage their teams to attend a training session, all of which helped to further increase attendance.

The co-ordinator closely monitored attendance and statistical reports were sent to the project team on a daily basis. Issues presented at training sessions were also reported on for quick resolution in advance of the migration.

**TRAINING** 

Due to 80% of users working from home, the client had deployed the upgraded turrets to be shipped out to each user's home.

A typical training session consisted of a 30-45 minute online slide presentation which included assistance in plugging in turrets, handsets and headsets, assisting with log-in procedures and talking through the testing of handsets and microphones. The upgraded devices were a completely different format and build compared to the old devices and therefore each component, button and screen had to be explained thoroughly.

Q&A sessions were tagged onto the end of the demonstration, with any issues reported to the project team daily. Profiles were also checked with users and any missing data or discrepancy noted and escalated for timely resolution in advance of data migration.

**GO LIVE** 

Floor support was given to those users working from the office. Issues unable to be fixed at the users' desks were quickly reported to the Technical Project team for speedy resolution.

A virtual support service was set up for all home users through a Webex chat room, which opened from 6.30am-4pm for 3 consecutive days, giving users full, on-demand support. The chat room support also served those users that had either missed a training session or required refresher training.

An effective fault-logging and tracking system was also created and shared with the project team to closely monitor faults and resolution. Soft copies of quick reference guides were distributed to all users for ongoing support and future referral. Hard copies were dropped onto users' desks working from the office.

All elements of the migration made for a smooth transition with minimum disruption to the trading day.

**RESULT**

- Dedicated co-ordination of training sessions ensured a high percentage of users were trained - deemed by the client as a vital element of the migration's success
- Although challenging due to Covid restrictions, successful remote & on-site training sessions were delivered to users which helped them to fully embrace their new technology in a positive way
- Profile checking during training ensured user profiles were correct and traders were fully productive on day 1 of migration, ensuring a seamless transition into the new upgraded platform
- Continuity of training consultants for both remote and on-site training & live day floor support instilled client and user confidence

**150**  
users