

900 User Adoption project for a Tier 1 Global Investment Bank



BRIEF

Techary were engaged to provide a large international investment bank with a phased User Adoption programme to support an application upgrade and migration of approximately 900 trading positions over a 6-month period. Techary worked closely with the client's Project and Technical teams to deliver a successful user adoption co-ordination programme & training along with 2 days of uninterrupted floor support for each of the 6 phases of migration.

SOLUTION

TRAINING 

Typically, a training session included a 30-minute demonstration of the new application functionality, including the new log-in process. User Acceptance Testing (UAT) was tagged on to the end of the session.

The training team were positioned on the trading floor for visibility and for the traders' ease of access. The lead training consultant liaised closely with the client's Project and Technical teams to report on all issues presented at training, including technical issues and profile change requests, to ensure timely resolution in advance of data migration.

CO-ORDINATION 

The client required Techary to provide a training co-ordinator to manage the training schedule of all 900 London users due to migrate onto the new platform. The role involved:

- Working with the client's Project team to develop marketing and promotional comms to help drive awareness and create user interest.
- Working with all key stakeholders to build and grow good relationships to further enhance the success of the upgrade and migration concept.
- Working with the Moves & Changes team to identify the most beneficial desks and areas to set up for training purposes, ensuring these were conveniently located to help ease time constraints away from desks for traders.
- Regularly liaising with the business heads and working with them to drive user interest and encourage teams to attend sessions.

Spreadsheets were designed, built and managed to schedule and track attendance and report issues for each of the migration phases. The co-ordinator role was identified as key to the overall success of the project.

GO LIVE 

A trading floor support team delivered visible and uninterrupted floor walking support for users, providing effective fault logging for timely resolution.

The lead consultant was onsite to oversee and direct the team, thus helping to ensure that all elements of the migration made for a smooth transition with minimum disruption to the trading day.

Quick reference guides were distributed to all users for referral to functionality and features of the new device.

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
- Short training sessions visibly situated on the trading floor within easy access for traders proved beneficial
- Users embraced the new upgraded features in a positive way
- Continuity of lead consultant carrying out the scheduling, along with the same training team throughout the entire project instilled client and user confidence
- UAT within training ensured user profiles were correct and allowed traders to be fully productive on day 1 of migration, helping to ensure a seamless transition to the upgraded platform

900 users

