



# Case Study



## Company Profile

It is a major American financial services company based in New York. It was formed from one of the world's largest mergers in history by combining the two banking giants around 12 years ago. It has the world's largest financial services network, spanning 140 countries with approximately 16,000 offices worldwide. The company employs approximately 300,000 staff around the world, and holds over 200 million customer accounts in more than 140 countries. It is a primary dealer in US Treasury securities.

*The banking and finance industry is undergoing a major revolution due to the varying economic condition and its self –dictatorial systems. As we no longer are inclined to the past years' rules, it has resulted in a large number of players in the banking and finance sector. Now a days, with a lot of product offerings from the different banking institutions, this industry focusing on creating new rules of the game and is transforming into universal banking system. In that process a banking group also sought training and mentoring to be competent to survive in the globally competitive world of banking and finance industry.*

## Business Need

This major finance organization works to create mutually beneficial supplier relationships that contribute to shareholder value by delivering cost-competitive, superior products and services in a consistent manner with its values. It has set high standards of performance for itself and the products and services it offers and expect the same from their suppliers. This organization believes in making diverse supplier development strategies to make the suppliers understand its internal process, enabling decision-making, and sharpen their business management skills. For this purpose they wanted to have a professional mentoring, training and networking system for managing their projects to cope with the growing and changing business needs. They looked for a solution which is ideal for project portfolio selection, budget and resource allocation, strong synchronization and consistency between projects and project managers and top-level reporting about projects and resources.

## Addresses:

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## Solution

AstroWix, being known as a prominent project management solution provider, executed the Microsoft Enterprise Project Management solution to become the common source for Project Management in the organizational level. When deploying an enterprise solution, implementation is a critical and yet a complex project on its own. AstroWix trained the professionals on using the tool and to utilize it for their own business needs. The extensive training on implementing EPM technology by AstroWix, not only made the professionals competent in handling the tool, but also provided insight into how projects and resources line up with business objectives and influence performance. Deploying a PM methodology aided quick implementation of projects in a rapidly changing market. This methodology contributed in project planning, monitoring, updating progress, reporting and maintaining strong coordination among the managers and the top-level management, managing risks & issues regarding cost-effective, finer products and services.

## Benefits

With the implementation of the Microsoft EPM solution, the company could set-up effective Project Management System by using EPM solution. This technique helped them develop Project Plans to meet deadlines. They were able to create modified reports for their major goals achieved throughout the project and the various phases of it.

For this organization, project management provided the structure to reduce time, cost and helped manage risks. Project Plans allowed the organization to run a proper research and development project before launching a new product. The project stakeholders were immensely benefitted by the training and guidance received from AstroWix on Microsoft EPM Solution.

*For More than a Decade, AstroWix has been delivering excellence in Project Management to more than 250 fortune 500 companies and government organizations. We provide expert project management services to help organizations and their people perform to maximum potential.*