

# IT SUPPORT IMPLEMENTATION FOR A LARGE FEDERAL BANK



## THE CHALLENGE

A large federal bank managing over \$100 billion worth of assets realized that their employees were unable to effectively do their job because they had to sort through copious amounts of content stored across multiple repositories. Specifically, the bank narrowed its attention to its IT Department, as this business unit was suffering from a large amount of duplicative, irrelevant, and outdated information totaling over 1 Petabyte of data. These challenges were reducing the IT Department's effectiveness to quickly respond to support requests in ServiceNow due to Customer Service Representatives (CSRs) not being able to easily find supporting information stored in SharePoint 2016, DokuWiki, and corporate shared drives. The IT Department looked to upskill their staff to govern its repositories and advance their technological capabilities to improve their CSRs ability to find and share content.



## THE SOLUTION

Piloting an approach with their IT Support team, EK implemented a Knowledge Management strategy in addition to a taxonomy and an enterprise search strategy aligned with the Bank's needs and objectives. Using an agile approach, EK:

1. Inventoried information repositories, based on criticality and frequency of use;
2. Assessed and prioritized content by developing indicators to determine content's value based on user needs and organizational goals, thus eliminating stale, inconsistent, or irrelevant information;
3. Implemented a taxonomy management tool and integrated the system with repositories to tag content, based on an EK-developed taxonomy; and
4. Revamped the search experience by implementing an open-source search engine and designing a new search interface and indexing strategy.

EK trained IT Support Managers, CSRs, and technical staff on how to conduct their roles with the new solutions and further scale their capabilities to benefit other business units in the bank. EK also implemented a KM Leadership team to ensure KM governance processes were in place and that the bank understood the newly developed strategy and how to communicate its value to executive leadership and their staff.



## THE EK DIFFERENCE

EK was able to provide end-to-end KM services for the bank with expertise ranging from strategy and design to implementation and maintenance of the proposed solutions. EK utilized a variety of top-down and bottom-up approaches to assess the current inventory of repositories, define a content management strategy based on organizational and user needs, implement a taxonomy management system to properly tag and manage content, and align the system with an EK-designed taxonomy for consistent content management. EK partnered with the bank's IT team to ensure a transparent and collaborative process, and to ensure that the bank's staff received the proper and necessary training for effective maintenance of the new solutions. EK further enhanced the process of finding information by implementing a search engine, using in-house expertise, which also aligned with the content management strategy, taxonomy management solution, and the new taxonomy. EK was able to streamline the process of finding information due to the varied expertise in taxonomy design/implementation, content management processes, and enterprise search design and implementation.

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## THE RESULTS

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EK's collaborative and transparent style of working resulted in positive reviews from faculty and instructional support staff all the way up to executive leadership. Our client went as far as to say, "We cannot do this without EK." With the training plan's implementation, the Human Resources Department will have standardized mechanisms for evaluating performance and a framework to strategically anticipate training needs. In addition to a competency-based framework, the training plan also provided sound technological guidance which will optimize the search experience of the organization's learning management system and related technical ecosystem. Implementing this training plan will result in an upskilled workforce ready to deliver instruction in a virtual environment.

Enterprise Knowledge (EK) is a services firm that integrates Knowledge Management, Information Management, Information Technology, and Agile Approaches to deliver comprehensive solutions. Our mission is to form true partnerships with our clients, listening and collaborating to create tailored, practical, and results-oriented solutions that enable them to thrive and adapt to changing needs.

Our core services include strategy, design, and development of Knowledge and Information Management systems, with proven approaches for Data and Information Management, Knowledge Graph Implementation in support of NLP, ML, and AI initiatives, Taxonomy Design, Project Strategy and Road Mapping, Brand and Content Strategy, Change Management and Communication, and Agile Transformation and Facilitation. At the heart of these services, we always focus on working alongside our clients to understand their needs, ensuring we can provide practical and achievable solutions on an iterative, ongoing basis.