



Consulting for the Financial Industry

CASE STUDY

Talent. Teamwork. Trust.



VMS rescues data center migration project at risk of failure

VMS Customer saves \$12 million and meets contractual deadlines

Customer Challenge

VMS's client, a large technology and business process outsourcing company with operations in New Jersey, Texas, Colorado and more than 100 other locations worldwide, acquired the human resources (HR) processing business from a large outsourcing services firm. The HR transmission files had to be transferred to the outsourcing company's data center, but the in-house staff at the data center lacked the expertise to support the proprietary program used by the financial services firm.

VMS's client selected a third-party transmission program, Gentran, which required extensive re-programming for 2,000 customer transmission files. Conversion requirements complicated an already challenging project that was running several months behind schedule. This increased the risk that the outsourcing company would be forced to pay fines if unable to meet contractual obligations to transmit critical payroll and other data on time for its customers.

VMS Solution

VMS was hired because of its expertise in all of the financial systems required for this data center migration. Additionally, VMS had a proven track record of strategically and successfully managing projects in rescue situations.

The VMS team immediately analyzed the root causes of the project delays. They quickly determined that a geographically dispersed group of people on the data transmission team, including their client's staff and Gentran programmers, were working without standard processes and protocols in place.

VMS developed a migration plan, assigned VMS experts to each task, and managed the entire conversion team to get the project back on track. In doing so, they performed the following:

- Designed a standard inbound/outbound transmission process document for Gentran programmers to follow to create a standard program module.

Executive Summary

Challenge

- Rescue a data center migration project at risk of failure
- Meet a contractual deadline to avoid incurring costly penalties
- Manage a geographically dispersed group of programmers and consultants as a single team
- Standardize the transmission processes

VMS Solution

- Strategic and accurate analysis to uncover root causes of project delays
- Expert management of the conversion team
- Standardization of procedures and processes for file transmissions
- Creation of pre-production checklist and quality assurance team

Results

- \$12 million cost savings by using in-house resources
- \$1 million saved by avoiding penalties
- Development of internal subject matter experts
- Fulfillment of all contractual obligations, on time and on budget



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- Created a pre-production checklist document and a quality assurance team to review the checklist with the programmer prior to moving a transmission to production.
- Generated a standard data document to capture information about existing transmissions.
- Created a standard client/Vendor script document to be used by Gentran programmers when conducting client/vendor technical meetings to gather transmission protocol information.
- Developed a tool to forecast daily productivity on the transmission project, allowing accurate measurement against upcoming deadlines.
- Met daily with the client's C-level executives to provide status reports and strategic recommendations.

Customer Benefits

Significant cost savings. Because VMS provided the expertise and project management capabilities, the client was able to save \$12 million by performing all file transmissions using in-house resources, rather than relying on the financial services firm from which the HR business was acquired.

Contractual obligations met. VMS' client completed the file transmissions by the contractual deadline and were able to save \$1 million in penalties. VMS came into the project 14 weeks before the penalty would have been in effect, and despite the late start, managed to meet the deadline.

Development of internal subject matter experts. VMS helped the client develop in-house expertise and gain control of the transmission process, eliminating dependence on outside resources.

Increased efficiency. VMS standardized the overall transmission process, producing documentation of all active clients and their associated transmissions.

About VMS

Founded in 2002, VMS, LLC (Virtual Management Solutions) offers a specialized portfolio of consulting services for financial services firms worldwide. We are owned and operated by an executive team with a reputation for excellence and integrity in the financial services industry. Because of our exclusive focus on financial services and dedication to personal service, we are able to work with clients quickly and expertly to deliver technology requirements, business models, and management practices, as well as complete project management—from planning and methodology, to execution, staffing, documentation, quality assurance testing, and training.

For more information, visit www.vmsconsulting.com.
Email info@vmsconsulting.com
or call 201-323-7499.

VMS, LLC
102 NE 2ND Street
PMB 374
Boca Raton, FL 33432