

Customer Profile: ShoreBank

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Improving New Hire Request Management in an OnDemand Environment



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ShoreBank Corporation is America's first community development and environmental bank holding company. Headquartered in Chicago, ShoreBank is a \$2.4 billion company with banks and nonprofits in Chicago; Cleveland; Detroit; Ilwaco, Washington; Portland, Oregon; and Michigan's Upper Peninsula; and consulting services around the world.

ShoreBank fully had its own internal system for processing many bank requests, but it was not being utilized for the human resources department, which was often not made aware of new hires throughout the bank until after the fact. Additionally, the IT department was looking for a web-based solution that would reduce the number of on-site servers and processors, and which would eventually take the place of its in-house Call Tracking system.

The Challenge

- Find a request management system that would aid in notifying human resources in advance of the start date of new hires brought on in various departments across numerous locations.
- Choose a system that would integrate with the other software systems run throughout the bank.
- Reduce the bank's server and processor footprint by choosing an on-line solution.
- Find a system that could eventually replace most, if not all, functions of the bank's in-house Call Tracking software system.

Activation Summary

Integrify OnDemand version 4.7 was implemented in May 2009.

The Integrify Solution

ShoreBank's management team found the Integrify model intriguing, particularly the ability to take sizable processes and make them more manageable, as well as the many opportunities for automatic notification to diverse groups within the organization. ShoreBank used Integrify to create a complete process that would ensure that notifications to various departments would allow for tracking, follow-up and reporting.

Integrify is a flexible Enterprise Request Management (ERM) system that allows companies to automate requests and streamline processes. The solution provides form creation, routing definition and tracking tools to those responsible for processing requests, minimizing data entry and simplifying requests for approval and fulfillment. Integrify is web-based, allowing for easy user accessibility and management of business processes. The solution eliminates problems typically related to labor-intensive processes such as manual paper handling and email requests, and can reduce costs per transaction 60 to 90 percent as opposed to paper-based processes.

By allowing a company's employees the most efficient means to access, submit and obtain fulfillment for requests, an organization can offer the best possible level of service to its customers. With Integrify, efficiency gains are immediate and most companies can expect a return on investment (ROI) in three months or less.

The Integrify OnDemand solution provides the full functionality of Integrify via the Internet without the need to install and maintain software. It reduces the risk, cost and time when implementing a solution for process management. Instead of installing the software on its own site, a company can directly access the software, updates, and infrastructure, which are all maintained by Integrify, freeing up time and resources to focus on business.

With 725 staff members in total, approximately 200 employees across three locations in the Chicago area are currently designated users of the system. "Integrify has simplified the hiring process as well as made it completely traceable, providing an audit trail of all activities of every hiring manager, as well as any of the service managers, regarding any employees coming into or leaving the organization," said John Evans, Senior Vice President and Director of Information Technology at ShoreBank.

Right now the system is handling seven different request types for human resources, as well as a separate, unrelated process that examines potential customers' credit risks. The HR requests reach about 10 to 15 monthly, while the credit risk assessment requests can reach 200 in a month. But as more of the bank's processes are moved over to Integrify, the number of requests could reach up to 2,000 per month.

The Benefits

Integrify OnDemand has provided ShoreBank with significant capabilities that will eventually encompass all the request management needs of its entire organization.

The system has proven flexible, easy-to-use, and transparent. Also, the OnDemand option has provided the bank and its employees with additional versatility.

"Another important aspect of Integrify for us was that as a bank, we have a lot of bank-centric software that we're running on-site and at the same time we're trying to reduce our footprint by using the internet more and not having as many processors and servers to manage. So the fact that the OnDemand system was hosted on the internet rather than on-site was a big plus for us as well," said Evans.

The web-based option is also a benefit for employees undertaking business travel and as more employees take advantage of ShoreBank's flexible hours and work-from-home opportunities. The system is available to any employee with Internet access. Similarly, ShoreBank can use the Integrify system for some of its affiliates that are not on the bank's wide area network.

ROI

According to Evans, ShoreBank's return on its investment in Integrify can be seen in two ways: one in the speed it allows staff to make, respond to and process business requests; the second is how this efficiency allows the organization to provide better customer service.

"It's clear to me that the benefits will be great," said Evans. "We now have a very powerful tool that, as we get requests to improve processes, we are confident we will help the organization move forward."

Conclusion

The technology has worked so well that ShoreBank has embarked on implementing it to solve additional challenges as well. "We are looking at a number of other processes that are already automated or partially automated and thinking about moving them to the Integrify system in the next year or two," said Evans.

ShoreBank utilizes another system, called Call Tracking, which its IT team built itself. Call Tracking is the system that monitors and processes requests between departments (such as when a customer calls the service department with a question and the service personnel need to locate the appropriate person within the bank to answer the question for the customer). The Call Tracking system is hosted in-house and Evans said ShoreBank is looking very closely at moving many of the pieces to Integrify. "The benefit of moving to Integrify would be that we could, because of Integrify's versatility, tailor the behavior of each specific situation whereas in the Call Tracking model we have to make the behavior fit with how the software works," said Evans.



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