

CASE STUDY: CHASE MANHATTAN BANK

Open Enrollment Implementation from Edify Consulting Services

When Chase Manhattan Bank merged with Chemical Bank, Human Resources was faced with a tremendous challenge: how to merge both banks' human resources and benefits systems, prepare new benefits offerings in five months in time for the open enrollment, and administer the enrollment in an automated environment. As a first step, Chase—now with double the employee population as a result of the merger—decided to leverage Chemical Bank's success with Edify's Electronic Workforce for open enrollment. To deploy the interactive voice response (IVR) system, Chase partnered with Edify Consulting Services.

TIGHT TIMELINE AND FAST TURNAROUND WITH NO ROOM FOR ERROR

"We selected Edify Consulting Services for their experience and willingness to commit to our very tight open enrollment deadline," explained Marion Morgenthal, Vice President. The project to merge both banks' HR and benefits systems did not begin until April, and Chase's new benefits plans weren't finalized until that summer. Open enrollment for almost 55,000 domestic employees had to take place just a few months later by the end of October. "All employees had to reapply for benefits or lose them—so the IVR system had to work right the first time—with no room for error," said Morgenthal. "Edify Consulting Services partnered with us in meeting this challenge."

Edify Consulting Services first defined and built the system to handle complex rules for all of Chase's Health and Welfare, 401(k) and Stock Purchase Plan benefits. The technical environment, which had also doubled in size, required the configuration of eight new servers with 48 lines each. High volume tests were then performed prior to going live.

Throughout development and testing, Morgenthal was particularly impressed by the dedication of Edify Consulting Services' consultants. "Because of our very tight timeframe, our Edify consultants made themselves available around the clock," said Morgenthal.

OPEN ENROLLMENT A COMPLETE SUCCESS AND READY ON TIME

The end result? "The project was a complete success," concluded Morgenthal. "We met our deadline with everything working the way it was supposed to. Almost 55,000 employees used the IVR system—many of them for the first time—with almost no problems. With the help of Edify Consulting Services, we had an efficient, accurate and virtually flawless open enrollment."

“*We had an efficient, accurate and virtually flawless open enrollment.*”

—Marion Morgenthal, Vice President
Chase Manhattan Bank



SUMMARY

Developed and implemented Open Enrollment.

Industry:	Financial Services
Tools:	Electronic Workforce
Back-End Systems:	IMS, DB2, SQL Server
HRMS:	Multiple in-house systems
Media:	Telephone (IVR)



E d i f y C o r p o r a t i o n

2840 San Tomas Expressway, Santa Clara, CA 95051 USA
Phone: (408) 982 2000 (800) 944 0056 Fax: (408) 982 0777
<http://www.edify.com> e-mail: info@edify.com

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