CHASE

BACKGROUND:

The Chase Manhattan Bank

The merger of The Chase Manhattan Bank and Chemical Bank has resulted in the largest banking company in the United States. Under one name, Chase Manhattan Bank now employs over 68,000 people worldwide and has $352 billion in assets, making it the largest, and first broadly diversified, domestic banking organization to have top-tier positions in each of its principal business lines.

The new Chase has more primary relationships with large U.S. companies than any other U.S. bank, making it corporate America's leading bank. It is also one of the nation's preeminent financial product companies, with leading positions in credit cards, mortgage banking, consumer finance, mutual funds and home banking. Domestically, it has offices in 39 states, and relationships with more than 25 million households coast to coast.

CHALLENGE:

Multiple systems, one solution

With an employee base of over 68,000, the new Chase human resource technology management group had to build an infrastructure to support the combined workforce. Allen Stillman, Senior Vice President of HR and Corporate Staff Systems, faced a two-fold challenge: implementing a new set of technologies to support the combination of the two companies, while supporting the new benefit packages for the expanded employee base.

Before the merger, Chase and Chemical Bank had similar computing environments, and embraced similar approaches to utilizing technology. Each bank was mainframe-based, and

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>
> *-Allen Stillman,*
> *Senior Vice President of HR and*
> *Corporate Staff Systems*

relied on a combination of packaged applications and in-house HR information systems. The Chase technology management group had to merge existing HRIS, payroll, training and several other major employee information systems. Once that was completed, Chase had to communicate these processes, and perform an active enrollment for all 58,000 domestic employees. Each employee had to select from 12 different health and welfare plans, 401(k) plans and employee stock purchase plans.

"Rather than trying to choose the best individual applications, we wanted to choose a suite of applications to go forward," says Stillman. This approach allowed the team to very aggressively exploit system integration in the most efficient way, without risk. "Having one suite saved us a lot of problems in fitting pieces together. On the HR side, instead of choosing time and attendance from one bank and open enrollment from another bank, we looked at choosing a complete suite." Working with a short time frame, the team set forth decision criteria including functionality, risk, amount of work, resources necessary, knowledge (both internal and external), and integration with existing systems.

SOLUTION:

Edify bridges the gap across systems

In evaluating technologies already in use at both banks, the technology management group decided to move forward with Chemical Bank's suite of systems, which included Edify's Electronic Workforce product. "We thought Edify was a stronger voice product than what we were using at Chase," says Stillman. Edify's ability to tie into multiple legacy systems, expand rapidly, and innovate into

EDIFY

CHASE

the future were key factors in the decision. The resulting set of interactive voice response (IVR) applications from Edify delivered a wider range of self service functions than either bank's former systems offered.

HR phone applications, live call center

The Chase team integrated existing systems with Edify's Electronic Workforce software. Their first application was to streamline the annual open enrollment process. In a six-week period, more than 58,000 domestic Chase and Chemical employees were able to sign up for benefits over the phone. Each employee called the system and provided identification through a Social Security number and PIN. Edify's Electronic Workforce then checked the linked databases and offered the appropriate options for each employee. Now, Chase employees can change personal and benefit information easily over the phone at any time using the Electronic Workforce system.

The next phase was to increase the functionality of the voice response system. Access to health and welfare benefits and 401(k) plans already existed, but Chase added job posting, training, and employee program information to the available services. Some of the new services were built using Edify technology, and others were simply links to existing applications. Either way, the Edify system provided a simple employee interface.

The final element of the strategy was integrating the IVR system with the new call center. "Employees can now call in to the Edify system and then, if needed, transfer to a live operator. It has been a great success in the corporation," says Stillman. "Business managers in HR and line managers have all been very complimentary

about the rollout of the call center and the services it provides. They're now seeing HR as investing in providing customer service. That may not be a new concept, but it's certainly more visible than it had ever been in the predecessor organizations."

Easier HR administration

One key advantage of Edify's software is that it integrates with Chase's multiple systems in real time. Synchronizing the batches of transactions (and the headache of dealing with exceptions) is no longer a problem. The Edify system manages the entire process with one simple employee interface.

In addition, its flexibility and expandability allows Chase to continue to add functions and expand infrastructure. "We just rolled out new hire benefits enrollment, which had still been by paper," says Stillman. "We'll continue to put more information out to employees via the phone. We give 401(k) information now; it's likely we'll look at providing payroll information out on the phone as well. And over time we'll continue to enrich choices and expand offerings. Currently the system serves primarily active employees, but we'll expand to include former and retired employees, all served by one call center. And we are looking to expand employee self service capabilities to the desktop."

"Edify allowed us to build a much more robust offering for our employees than either bank had before," Stillman adds. "It was a real win coming out of the merger. We were able to offer a much richer product to our employees, and a very rich set of voice applications to choose from. Edify has been a great partner."

EDIFY

T e c h n i c a l   S u m m a r y

Industry:	Financial Services
Tools:	Electronic Workforce
Databases:	IMS, DB2, SQL Server
HRMS:	Multiple in-house

A p p l i c a t i o n s   S u m m a r y

Open Enrollment, Benefits Verification, Job Posting, 401(k) Account Management, New Hire Benefits Enrollment, Training Enrollment, Call Center Integration

M e d i a

Telephone (IVR)