



THE CHALLENGE

The landscape at financial institutions has shifted and as a result, staff are more highly trained than ever before. A \$915M financial institution with 9 branch locations found its branch managers were spending an excessive amount of time on maintenance administration rather than on employee training and coaching. The Facilities Manger estimated that up to 1/3 of the workday was spent on branch communication and dealing with vendor service calls.

This poor use of time led to the branch managers' inability to meet monthly goals and morale at the branches was suffering.

THE SOLUTION

The FI turned to Equips for strategies to increase efficiency and remove the burden of equipment maintenance from the branch managers.

Our industry experts consulted with the Facilities Manager on ways to optimize the performance of their equipment and ensure maximum uptime.

This in turn led to less time spent on equipment service calls. We directed the FI to some of our preferred service providers, which improved the quality and responsiveness of service received.

Equips implemented our centralized platform, E-LINK, to manage service events across all branches. E-LINK enabled branch employees to request service and receive automatic updates.

Each service event can be tracked within E-LINK and an Equips expert ensures service is delivered to the branch manager's satisfaction. Reporting and invoicing are all handled within E-LINK, removing that burden from the branch managers.

THE RESULT

By leveraging our expertise and using E-LINK to relieve branch managers of the burden of managing maintenance, the FI saw the culture within the branches shift. The heightened communication led to a team approach to goals, staff turnover decreased, and the staff became more focused on customer service.

Branch managers could allocate more time to training and coaching employees, which improved the overall performance at the branches. The sales ratio of products per household increased more than 300%.

