

# CASE STUDY



## Staff Time



### THE CHALLENGE

The landscape at financial institutions has shifted with our fast-paced world, 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 Manager 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 the branches' morale decreased as a whole.



### 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, which 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, Equips.com, to manage service events across all branches. Equips.com enabled branch employees to request service and receive automatic updates at any time.

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



### THE RESULT

By leveraging our expertise and using Equips.com to relieve branch managers of the burden of managing maintenance, the FI saw the branches' culture shift. Improved communication led to a team approach to goals, a decrease in staff turnover, and a greater focus on customer service.

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



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