

Store Roll Out



Zones provided the speed, security, and transparency a financial services provider needed to upgrade their thin client devices.

The client is a leader in the financial services industry. They were months behind on their thin client upgrade due to struggles with previous vendors and unforeseen downtime stemming from the COVID-19 pandemic. Due to their role as a global financial institution, they needed a trusted partner to quickly and securely upgrade their thin client solution, so they reached out to Zones.

Zones leveraged their extensive field technician network to badge and mobilize over 1,000 technicians to upgrade the client's devices across the United States. The client's project management team had total transparency into every step of the project thanks to Zones' enterprise project execution tool, which allowed them to access and monitor the project in real-time.

Thanks to Zones' efforts, the client's thin client upgrade was complete faster than anticipated, with zero downtime.

Challenges

- Due to challenges with prior vendors and downtime from COVID-19, the client was nine months behind on their thin client upgrade project, with dates continuing to slip.
- During this time, the client was facing reliability issues from aged devices. As the client is a financial services institution, this was unacceptable.

Solutions

- Zones mobilized over 1,000 technicians across the United States to perform the upgrade. The technicians chosen passed the security requirements and background checks needed to complete this work inside a financial institution.
- The upgrade was completed after regular business hours, which allowed the client to maintain normal hours and reduced downtime.
- Zones utilized their enterprise project execution tool to manage field deployments in real-time. The client also had access to the tool and could monitor activities at a project level at every branch.

Results

- The client completed their thin client upgrade project and quickly upgraded old devices across hundreds of branches, ensuring stability across their computing devices. Zones' ability to scale improved the pace of the upgrade by 300% over the client's previous efforts.

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The Challenge

The client, a global leader in the financial services industry, had initiated an upgrade of their branch locations' thin client devices to ensure that they could handle customer-facing activities and transactions with the required efficiency. However, a series of challenges and setbacks put them nine months behind their estimated completion date, with no end in sight.

The client was using another vendor to facilitate the upgrade, but the vendor wasn't equipped to handle a project of this size, leading to delays. During this time, devices were continuing to age, and reliability was becoming a significant concern – the client decided to replace the prior vendor with Zones with the assumption that Zones would complete the project securely and with a minimum of downtime.

The Solution

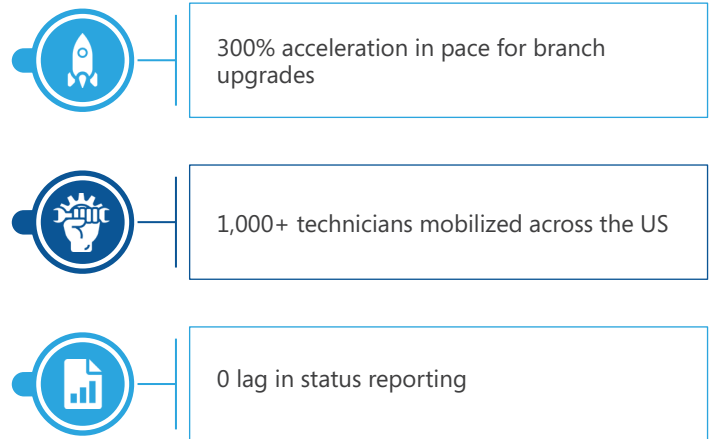
Zones set up a solutions team to understand the end-to-end process in detail to complete the project with speed, agility, and scale. As the process required interfacing with multiple different groups – including other vendors who supply and stage the hardware – various touchpoints needed to be clearly understood. A robust project playbook was created as part of the start-up phase.

Zones utilized their extensive field technician network to badge and mobilize over 1,000 technicians across the United States to complete work in their retail locations. These technicians passed the rigorous security requirements and background checks needed to complete this work inside a security-conscious financial institution. Not only that, but Zones' flexibility allowed for these installs to be completed during or after regular business hours, which gave the client the ability to avoid business interruption.

Another critical aspect of the solution was to ensure real-time tracking and reporting of progress. Zones deployed nterprise, their proprietary project execution tool and a part of Zones Digital Platform, to manage field deployments in real-time. Zones customized nterprise for this project, which enabled field technicians to get digital instructions on locations and the activities. Technicians would update the status on nterprise with pictures, notes, and digital signatures as necessary. The client's project management team also had access to nterprise and could monitor activities at a project level at every single branch.

The Results

Zones upgraded the client's devices quickly, inexpensively, and with zero lag in status reporting. After the challenges dealing with the prior vendor, the client was pleased with the speed at which Zones was able to complete the project; they reported a 300% increase in pace for branch upgrades as compared to previous efforts.



“Zones' flexibility and ability to execute across the country has proven invaluable for the client – they have been thrilled with the service provided. It especially helps when executives were visiting a bank branch and ran into technicians completing the work – they were impressed at their efficiency and professionalism.”

– Solutions Architect, Zones

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