

# Case Study: Schroders Private Bank

## Managing processes for multi-national investment bank

### Client Overview

Schroders Private Bank, a division of Schroders plc, manages over £7bn on behalf of successful individuals and wealthy families around the world. It is a smart, hard working international private bank offering intelligent financial solutions, which deliver results through individual blends of specialist skills, tools and services.



### Scenario and Challenges

What would be the simplest, most time and cost-efficient way to create and record the new processes needed for Schroders restructured valuation production team to move into a centralised division?

### Solution

As soon as Tracy Ditton, Operational Risk Manager, used control she knew it was exactly what she needed to create, implement and maintain company processes for the future. "I didn't even need to read a manual to find out how to use it," says Tracy. "The software is designed so that you use your existing PC know-how, it is just so simple."

Rosemary Riley from Riley I.T Solutions Ltd (RITS), a Nimbus Alliance Partner, was called in to facilitate live workshops where Tracy and the new team developed the department's processes. As soon as they were decided Rosemary was able to capture them in control, at the same time showing the team how easy the application is to use.

### Results

control is now used by Schroders Private Bank to publish its processes on the intranet, making it available to everyone. This approach to managing the business means there is no need for a detailed manual that needs constant updates. Detailed documents and schedules will need maintaining but the overall structure will stay the same, remaining flexible to change if needed.

### Relationship

Nimbus staff provided help-desk support and responded with answers to queries almost immediately. Tracy attended control user courses, finding them to be hands-on, useful and inspiring. "Rosemary and all the Nimbus staff have always provided an excellent service which means we enjoy a good business relationship."

### Future

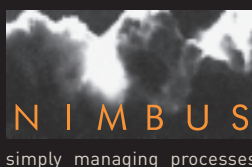
"I am a huge fan of control," says Tracy Ditton, "The system is very easy to use and it provides our business with what we need for procedures and process flows and could be used to the advantage of any business that requires this type of information."

The use of Enterprise Process Management and control has already been taken up by another project within Schroders, this time utilising the review and collaboration features of the web-based application, while RITS continues to provide both consultancy services.



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