



CASE STUDY: PROJECT COORDINATION

The Challenge

BTI's client was charged with rolling out an employee stock purchase plan for a large global bank with over 60,000 employees located in over 50 countries within a 6 week timeframe. Key challenges included an especially tight timeframe, coordination with 50 plus legal jurisdictions and payroll points and multiple Human Resource system platforms. In addition, the client group had minimal experience implementing large scale plans. The client requested that BTI develop procedural documentation for this plan.

BTI's Approach: Rapid Documentation

Since the client was faced with an aggressive non-negotiable deadline for implementing the plan and was experiencing difficulty in making progress, BTI's consultants structured the documentation project as a coordination tool for driving the project forward. BTI developed a map of the key processes required to implement the plan globally. Once owners for each process were appointed, BTI worked closely with them to determine the workflow and procedures for their process. Regular group status meetings ensured that each process owner was on schedule and received required support. BTI developed procedural documentation from the draft stage through the final stage. The documentation was shared with all process owners providing them with the big picture of the importance of each role for the coordination of the entire project.

Sustainable Benefits

Rapid Documentation was key to making sure that the plan was implemented on schedule with minimal problems. BTI's approach has provided the client with an effective model for managing complex projects requiring close coordination with numerous internal and external groups. BTI has continued working with the client to improve procedures and systems support for administering the plan. As an added bonus, the client has been able to reduce the cost of administering the plan while improving servicing. BTI continues to help this client manage highly complex projects.