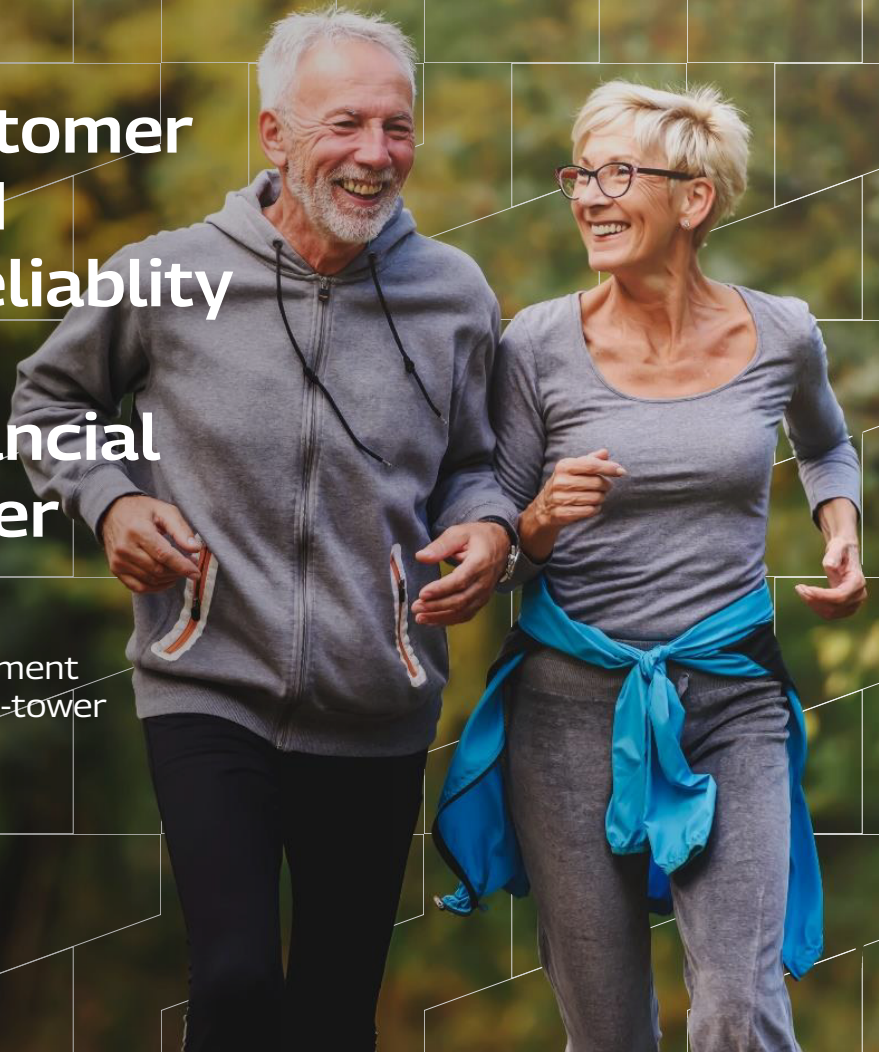


CASE STUDY

Enhancing Customer Satisfaction and Operational Reliability for a Leading Australian Financial Service Provider

Transforming incident management with strategic fixes and a multi-tower IT optimization approach



Business Overview

Ensuring operational excellence and high customer satisfaction are two critical areas for modern-day financial services enterprises. Digital infrastructures today are intricate, complex, and disruptive, where even the minutest change can cause ripples across the value chain.

Our client, a leading financial services provider with headquarters in Queensland, Australia, wanted to merge all their core applications. However, there were operational challenges that hindered this transition. There was an increase in the number of tickets that were generated, and this impacted service quality and stretched the internal teams' bandwidth considerably. The financial services provider decided to partner with Tech Mahindra, & their delivery team worked closely with our BFSI QWay team to enable a seamless transformation.

Client Background and Challenge

The client is a leading financial services provider in Australia, specializing in financial security and retirement planning. The organization had undergone a merger after which they experienced an influx of incident tickets, averaging 677 tickets per month between July and December 2023.

This increase was attributed to complexities introduced across multiple technology towers—application, infrastructure, end user computing, security, and CRM Tools. The surge placed considerable strain on internal resources and raised concerns regarding service quality and customer satisfaction. The client established a clear goal to tackle these issues and achieve a 30% reduction in incident ticket volume across all departments by December 2024.

Our Approach and Solution

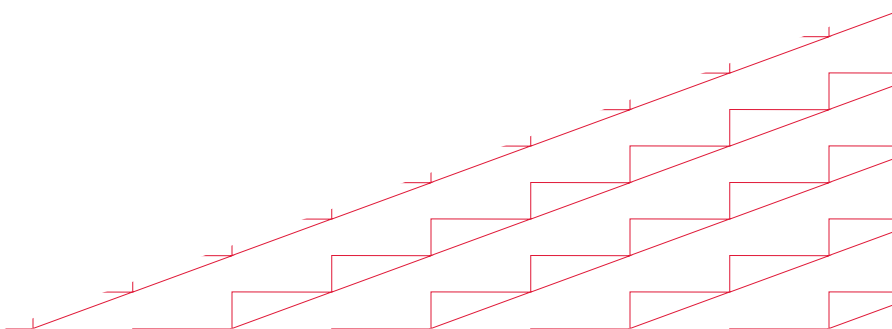
Understanding the core issues at play, Tech Mahindra's BFSI QWay team built and adopted a comprehensive strategy that would ease operations and address these ticket incident volumes.

- ▶ **Standardizing Post-Incident Review (PIR):** Uniform PIR templates were introduced, and root cause analysis (RCA) was reinforced using the '5 Whys' method for critical incidents. All action items were tracked diligently until resolution.
- ▶ **Establishing Pre-Change Advisory Board (CAB) process:** This process was implemented mainly to review production change requests (CR) before deployment. It included pre-defined peer review checks such as risk and impact assessment, evaluation of technical validity, compatibility with integrated systems, etc., aiming to reduce production risks.
- ▶ **Enhancing Incident and Change Management:** We identified deficiencies in the major incident management process, communication protocol, and change management process, and addressed them by conducting focused training on these processes for consistent execution.
- ▶ **Enabling Problem Management with JIRA Heat Maps:** We integrated and enabled heat maps in the JIRA tool to quickly visualize hierarchical data using a color-coded grid, making it easy to spot recurring problems and high-volume contributors.
- ▶ **Addressing Targeted Fixes:** Based on an analysis of past data, we resolved high-volume recurring problems related to Video Conferencing, data loss prevention (DLP), and Microsoft Teams by performing configuration changes.
- ▶ **Improving Monitoring and Alerting:** We enabled PRTG alerts (Monitoring Tool) for SAMBA/Windbid servers and integrated Datadog for live system monitoring.
- ▶ **Ticketing Tool Optimization:** We unified labels and components to improve categorization and reporting accuracy.

Business and Community Impact

Our consolidated approach helped our client experience measurable gains across key areas

- ▶ **Incident Volume Reduction:** An overall 61% reduction, with average monthly incidents dropping from 677 to 261 between June and November 2024.
- ▶ **Regulatory Compliance:** P1 incidents reduced by 75% with a significant decrease in reported breaches to the Australian Prudential Regulation Authority (APRA).
- ▶ **Customer Experience:** Complaints that were due to inefficiencies in processes declined by 30%.
- ▶ **Operational Reliability:** All critical platforms are maintained 100% with uninterrupted uptime for six months straight.

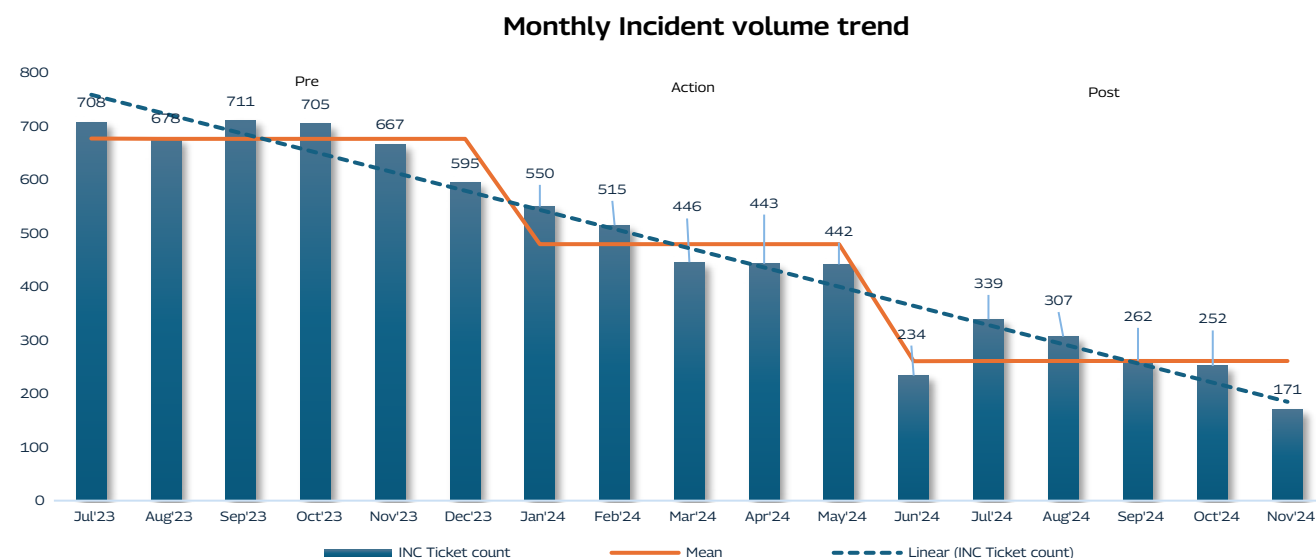


Customer Acknowledgement

"Impressed with the steady increase in maturity of the areas BFSI QWay team has been focusing on. It is wonderful to see that the improvements have continued to occur."

—Chief Technology Officer

Delivered Measurable Result



Incident volume drops from 677 to 261 per month, showcasing a 61% reduction between June and November 2024.



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