



A TAILORED TRAINING PROGRAM

Client Profile

A large Texas-based financial institution.

Challenges

As a health services provider, the client was challenged. Prior to CBI's partnership with the client, the financial institution recognized a need to manage information more strategically with respect to legal hold, risk and value. Archiving and eDiscovery was a chosen direction for which CBI accelerated a solution, including the Symantec™ Enterprise Vault product. Following implementation of the solution, the client found that nearly a dozen employees required proper training in order to effectively utilize the product. Symantec Enterprise Vault involves day-to-day administration and monitoring...without proper execution, the client's system would be unstable and vulnerable to loss of sensitive consumer data.

While Symantec offers a training program for the product, the format and time required of the employees didn't fit the client's demanding schedule and custom scope. Enter CBI and our expert training professionals.

Solution

CBI was able to offer the client a tailored, project-specific training program that was conveniently conducted in the company's facility. The training format allowed the dozen trainees to attend specific breakout sessions that directly correlated with his or her responsibilities, as opposed to a general training that combined all topics into one lengthy presentation.

The sessions, including a special training on Symantec's Compliance Accelerator product, covered planning and executing system back-ups, day-to-day administrative activities, comprehensive monitoring capabilities and disaster recovery.

Results

As a result of the CBI training program, the team has a thorough understanding of the risk management decisions and correlating impacts on the organization for the actions taken to mitigate company risk. Properly executing upon the policies and standards set forth within the CBI solution has allowed the client to realize stability and efficiency in managing messaging information.

The Compliance Accelerator training ensures that the financial institution is meeting all compliance regulations, including the Financial Industry Regulatory Authority, Inc. (FINRA), which requires ongoing message monitoring. Maintaining compliance has enabled the client to mitigate risks, such as regulatory fines, customer confidence and company reputation—all of which are immeasurably impactful on the bottom line.

OVERVIEW

Industry

Financial

Solution

Training: Compliance Accelerator

CBI Generated Results

- Continuous fulfillment of compliance requirements, including FINRA
- Diminished risk of fines and absence of consumer confidence
- Stability and efficiency in message management
- Informed IT management decision making

CBI CASE STUDY