

# EMS Case Study *Fortune 100 Financial Services Company*



## Background

Headquartered in New York, this EMS customer is a leader in investment banking, asset and wealth management, commercial banking, and a number of other financial sectors. The company, in its many incarnations, has played a major role in the American and world economies for more than 200 years.

## A Truly Global Presence

With operations in more than 50 countries, the company has a truly global presence. It employs approximately 170,000 people, with another 30-40,000 on the payroll as contract employees. Keeping track of the meeting and event space in which nearly a quarter of a million people gather on a regular basis to do business is a formidable task.

When they first implemented EMS many years ago, the company scheduled only five of its buildings in the system, each building's data residing in a separate EMS Professional database. Today, they book space in roughly 2000 rooms in more than 100 buildings worldwide using one EMS Enterprise system. Optimizing workplace utilization is a top priority.

"We're on a pace for about 300,000 bookings this year," says David K., an assistant vice president. "Although, we seem to be adding a new building to the database every couple weeks, so that number could go higher."

## Scheduling Evolution

The scheduling of 300,000 meetings a year should require a large team of schedulers, with that as their primary task. However, the company's reservation process has changed with their growing database, and a self-service approach is now allowing them to keep their scheduling staff to a minimum.

"We've seen their scheduling model evolve significantly in the many years that we've worked with them, says Kevin Raasch, executive vice president at Dean Evans & Associates. "They've gone from a full service scheduling process in which employees always had to work with a meeting planner, to a centralized call center, to a point where they are increasingly utilizing self-service booking capability through the web. Its been an impressive transformation."

### Fast Facts

- Books space in roughly **2000** rooms in more than **100** buildings using **EMS Enterprise**
- **300,000+ bookings** annually
- **Office "hoteling"** in 200+ offices and cubicles
- **Workplace utilization reports** key to managing real estate holdings

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“In the early days, EMS was primarily used for our conference centers,” says David. “Since we rolled out the Virtual EMS web component, conference centers only account for 30% of the activity in EMS. Now, any meeting room anywhere can be added to the system.”

*“Our wish lists for future upgrades are never ignored.”*

## Securing “Borders”

Given the size of the company and the number of environments in which it operates, it’s not surprising that it faces significant “territory” issues. “One of our biggest challenges is determining the level of access to the system that different users and user groups should have,” says David. “Meeting space ‘ownership’ is affected by a number of variables. The powerful, flexible security model in EMS ensures that people have access to *all* the spaces that they should and *none* of the ones that they shouldn’t.”

Another territory issue that is handled efficiently by EMS is the assignment of office “hoteling” spaces. More than 200 cubicles and offices are available to employees who reserve them on a self-serve basis in a successful “shared workspace” initiative that the company will continue to expand.

## The Payoff

The benefits of using a globally-accessible but centralized system for scheduling meeting and event space are many. At the most basic level, the advantages are in operational effectiveness: users are able to book a room in which to conduct their business quickly and efficiently. David sees the benefits at a higher level. “Where we save time and money is by using the room occupancy information to create workplace utilization reports,” he says. “Those reports are instrumental in helping us manage our real estate holdings and staffings.”

## A Long Term Relationship

For nearly 10 years, Dean Evans & Associates and this Fortune 100 company have worked together to streamline the organization’s scheduling processes. “We have had an excellent relationship,” says David. “Because of the size of our organization, even small upgrades can involve weeks of testing before we release them to our users. The DEA team has always been very supportive.”

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For more information on Dean Evans & Associates, and the company’s workspace scheduling and web calendar software products, go to [www.dea.com](http://www.dea.com) or contact the Sales department at [sales@dea.com](mailto:sales@dea.com) or 1.800.440.3994 ext. 863.

