



Focus. Flexibility. Crystal Clear Results.

Wells Fargo

Project Management for InfoSource Conversion Project

THE CLIENT

Wells Fargo

THE CHALLENGE

Following a merger with Wachovia, Wells Fargo needed project management to facilitate the onboarding of users to a new online documentation repository and new procedures. As a result of the merger between Wells Fargo and Wachovia, new tools, processes and procedures were being introduced to align both cultures. In order to streamline the flow of updated processes and procedures across the businesses, Wells Fargo selected InfoSource, an online procedures repository, as the go-forward model.

Users were accustomed to self-publishing documents via various SharePoint sites within the domain. With the implementation of the customized version of InfoSource, these users would no longer have direct control over versions, formatting and access for their respective group's documentation. Instead, the new model required standards to be followed across the businesses, which included teams of publishers who handled publishing and revision requests from the lines of business. Creating this new workflow process proved to be a major challenge for many groups. There was no formal project management component in place for the initial six months of the project.

THE SOLUTION

VisionCor provided a project manager and technical writing resources to assist Wells Fargo with the transition of their documentation from SharePoint to InfoSource. The project manager implemented processes to assist with communications, planning, resource allocation, and the overall onboarding of new groups to the system. Technical writing expertise was made available to the publishing team to assist with the conversion of self-published documents to InfoSource format. In addition, project management and technical writing resources were available to these groups to assist with planning, preparation and training on the use of the new model.

THE RESULTS

VisionCor successfully managed the documentation conversion project for the merger. The project manager and technical writing resources team developed and implemented more than 1300 procedure documents and 600 FAQs. The team also trained users and provided technical assistance to facilitate the transition of business groups to the successful use of InfoSource. Transitioned groups included Client Services, Business Purchasing Service Center (BPSC), Research & Resolution, Wholesale Internet Solutions Enrollment (WISE), Local Area Network (LAN), Business Continuity Plan (BCP) and Technical Services. With the procedures in place, additional business groups continued to onboard to the new application and procedures.

ABOUT VISIONCOR

Founded in 1990, VisionCor is a workforce learning, talent management, performance improvement, and documentation firm. VisionCor provides customized solutions and staff augmentation services to clients ranging from Fortune 500 corporations to small and mid-sized businesses. VisionCor's services include training, talent management, performance improvement, documentation, and project management to help companies implement organizational change initiatives and address their ever-changing workforce needs. Contact VisionCor at 888.299.8267, <http://www.visioncor.com>, or email at info@visioncor.com.