

Helpdesk

Case Study

Financial Edge was approached by a senior banker at one of the world's top investment banks who wanted help with supporting juniors after hours. This problem was intensified during lockdown – the seniors at the bank were concerned about business performance, as new analysts lacked the on-hand support that their predecessors had access to.

But it wasn't just technical support – being remote meant that the juniors also missed out on opportunities for mentoring, coaching, consulting, and career guidance. Financial Edge was tasked with developing an innovative solution to providing analysts with technical support and soft skill development opportunities.

CLIENT

Elite Investment Bank (top 2)

PROGRAM

Live technical support service

PARTICIPANTS

5-10 support requests per week since August 2021

INSTRUCTORS

4 technical experts on call

Lead instructor:



Chris Cordone

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EX - J.P. MORGAN

1. The Challenges



Communicating Experience

As is to be expected of one of the world's top banks, the client's senior bankers had extensive technical knowledge, and were proven deal makers – but that did not necessarily translate to an ability to teach, or nurture junior talent, or pass on their knowledge.



Need for Anonymity

The client needed an anonymous tool that analysts could use without feeling embarrassed to ask for help. The analysts need to be encouraged to seek support and advice from our experts without fear of judgment, and they needed to be able to seek support outside of usual business hours when their more experienced peers are likely offline.

2. The Solution



Training Expertise

Communication and training are nuanced skills. At Financial Edge, our trainers are not only experienced financial practitioners in their own right but are also trained to teach and support learners.



Accessibility

Our solution to the client's challenge was to build a live HelpDesk that's accessible (at all levels – from new analysts to directors) after hours. The solution was custom built for the client, and the process is completely streamlined – there are no tickets, no support queues, no help centres. Anybody that needs help – whether it's finding an error in a model, sense checking a valuation, or seeking advice or guidance, can connect immediately and anonymously with one of our on-call industry experts. This ranges from emails to Zoom calls with screen sharing (even when participants can be seen by the support staff, but this is not fed back to the client to ensure anonymity).



Integration

The Financial Edge support staff were onboarded by the bank, went through compliance and security checks, were trained extensively on internal models, have internal email addresses and access to all internal tools – the full access ensures there are no tech obstacles, and all support queries are handled smoothly and efficiently.



Live technical helpdesk (client-specific, so no tickets, queues, or wait times)



6 days a week, 8pm-3am NY (designed for after main workday hours)



Available across North America



On-demand, personalized, synchronous

3. The Impact



Ongoing Consultancy

Financial Edge's technical experts answer between 10-20 queries a week and deliver such high quality of support that they are now treated as an extension of the deal team, acting as consultants on retainer to troubleshoot complex projects and deal issues. The HelpDesk team effectively act as extra mentors and associates when the client's internal experts are busy.



Continuous Improvement

The HelpDesk solution was so successful, that even beyond Covid, after the client's analysts had returned to the office, the product is still in use today. The team frequently receive amazing feedback on analysts improving performance, helping develop their careers, and feel more confident on the desk.



Supporting Training Programs

The HelpDesk has also enhanced Financial Edge's ability to train the client's full-time analysts and associates, as participants can directly engage with technical experts after the training program has ended, and not just during it.

Trusted by Wall Street's Top Investment Banks

There's a reason we're trusted to teach Wall Street's best analysts. With instructors from J.P. Morgan, Goldman Sachs, Barclays, and other bulge bracket heavyweights, we deliver an unparalleled learning experience.

From investment banking fundamentals to specialized PE and asset management courses, we've got the resources to create bespoke training for any business needs. We deliver optimized training for your cohort and budget, whether it's in-person, virtual, on demand, or off the shelf.

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