



Challenge

First Data is a global technology and payments processing leader serving 6.2 million merchant locations and 4,000 financial institutions with 56 billion transactions worldwide. Its Solution Consulting (SC) organization is dedicated to helping its customers get more value from every transaction by providing innovative and personalized solutions. While the SC organization had strong individual teams, they operated as separate groups without consistent processes, outputs, and internal interactions with their sales, product, and implementations colleagues. First Data engaged Point B to design and launch a standardized and optimized consulting methodology that would improve consistency within the SC organization and drive increased sales, improved time-to-revenue, and higher-value customer interactions.

“Point B helped us really think about our approach and bring our Solution Consulting discipline to life. We improved our ability to fully understand our customer’s requirements so we deliver better solutions.”

JIM CONTARDI,
SENIOR VICE PRESIDENT OF
PRODUCT SOLUTIONS AND
STRATEGIC SALES

“Point B exceeded our expectations by getting ingrained in our business and being part of the Solutions Consulting leadership team.”

STEVEN ARTHUR,
VICE PRESIDENT OF
SOLUTION CONSULTING –
NORTH AMERICA

Process optimization

Point B’s discovery and design focused on process optimization—understanding how the SC groups operated, identifying pain points, eliminating activities that weren’t adding value, and collecting best practices from across the organization to drive consistency and quality. Point B leveraged numerous process optimization specialists at key points, including a three-day workshop with SC team leaders that focused on eliminating non-value-added activities and surfacing value-added best practices. All along, Point B led the core SC team in developing its own methodology, which assured buy-in and accelerated adoption during rollout.

“Point B exceeded our expectations by getting ingrained in our business and being part of the SC management team,” said Steven Arthur, Vice President of Solution Consulting – North America. “They quickly gained a personal feel for the pain points SC leaders had and the uniqueness of the respective product segments they serve. They drove the facilitation needed to discern the opportunities for improvement, helped us determine what the future of the SC organization should look like in how it operates, and they right-sized the methodology to our organization.” The result is a simplified, best-in-class SC methodology that works across all teams, along with enabling tools and success measures.

Making virtual an advantage

Following the in-person workshop, the Point B leader designed and led a virtual approach to the project that kept team

members efficiently informed and engaged throughout the aggressive 12 week project timeframe. Point B launched the optimized SC methodology with a full-day online training hailed by First Data for being “more effective than if we all had been in the same place.” The key was utilizing a mix of collective learning, actionable content, breakout sessions, and recaps to the full group.

Consistency breeds success

SC’s standardized methodology gives the organization a clear path to achieve its goals—and more. From day one, Arthur said “it’s given internal stakeholders a new level of understanding and trust in SC’s role as a conduit between product, sales, and implementations.”

The new methodology is a powerful sales tool in itself, Arthur said. “It’s an asset that shows how we address our clients’ needs through in-depth discovery and design.”

“The new methodology gives us a very clear way to get from the opportunity to the final client solution,” said internal SC customer, Nick Barnes, Vice President of Credit and Commercial Solutions. “It not only helps us win the project at hand, it also helps lead to more business with each customer. When a customer sees a demonstrably repeatable process that works so well, they have the comfort and confidence to plan for future business initiatives with us.”