

CASE STUDY

M&T Bank

A partnership built on legendary customer service

M&T Bank is a diversified, community-focused banking franchise with approximately \$140 billion in assets, and a network of 700 branches across New York to Virginia and the District of Columbia. They offer advice, guidance, expertise, and solutions across the entire financial spectrum, combining traditional banking services with the wealth management and institutional capabilities offered by Wilmington Trust.

Recently, the company embarked upon a period of renewal to focus even more on customers, believing they had an opportunity to introduce new skills and capabilities to meet evolving needs and expectations. They began to embrace an agile operating model and insource technology talent, knowing that in order to be relevant and competitive, speed to market is essential. To ensure sustainability, it also invested in a Tech Hub in Buffalo to make its hometown more attractive to the new talent it needed, while at the same time creating opportunities to partner with startups and incubators, all to benefit customers and the broader, surrounding community.

Challenge

To develop new capabilities that meet its customers' needs and deliver great experiences, M&T knew it needed to make its mainframe data stores and processes accessible to other computing platforms in near real-time. Considering the security, interoperability, and usability that are unique to mainframe environments, M&T knew it needed a highly skilled partner, and one who that shares its values, and is able to work in lockstep during the planning and execution phases.

Solution

The company chose to collaborate with Rocket® on a Digital Integration Hub (DIH), an architecture that synchronizes deployment for efficient access to mainframe data, limits business disruptions, and simplifies the development process. The solution consumes data continually, which produces consistent, up-to-date information, and generates more accurate results. The data can be accessed anywhere, anytime for reuse in other transactions or analytics systems in near real-time. It is also accessible with a self-service model, which reduces business disruption and improves outcomes. With information centralized,

employee workflows—from DevOps to customer service—are streamlined.

Rocket's input helped inform M&T's decisions and track progress so that developers could effectively test new solutions and determine how they add value. Rocket prioritized the human element of modernization, building relationships with M&T teams and partners to prepare them to execute solutions and promoting collaboration in each successive phase.

Rocket teams consistently provide the highest levels of customer support to M&T—including customization of the software itself—because never letting a customer fail is a core Rocket value. Derek Powe, M&T vice president, zPlatform manager, echoes this sentiment. He says, "Rocket is aware of how important this is to us, and they are making accommodations to make sure we are satisfied with the product, and that's a mark of good service."

Throughout Rocket's 12+ year relationship with M&T, the organizations have worked on many projects together to drive technology roadmaps that will meet the bank's end goals. George Garcia, Rocket Software senior account executive, who has been supporting this relationship, says, "Throughout the years, we have worked with M&T to support and inform its plans, update our products in support of its goals, and simply share knowledge. This partnership is all about collaborating in a way that uniquely meets M&T's goals."

Rocket's commitment to M&T is broad, and extends well beyond the direct business relationship. Because of Rocket's expertise and relationship, it often works directly with the bank's other suppliers to ensure its deliverables perform.

Powe says, "Rocket stands out because of the difference in communication. The fact that there is an intermediary, there's an expectation that communication would falter, but that wasn't the case."

// Our modernization strategy was always centered around leveraging our mainframe data stores and decades of development. **Rocket's collaboration has been a major asset in finding tactical solutions and ensuring success through each stage of execution.** //



Gary Fusco
Group Vice President,
Infrastructure Engineering
and Operations

Results

M&T's modernization is happening at record speed, thanks in part to Rocket. Access to real-time information enables service and decision-making based on the most accurate data, helping to mitigate risk and promoting the cultural shift that is essential to successful modernization. Ultimately, this creates better customer outcomes.

Gary Fusco, Group Vice President, Infrastructure Engineering and Operations, says, "Our modernization strategy was always centered around leveraging our mainframe data stores and decades of development. Rocket's collaboration has been a major asset in finding tactical solutions and ensuring success through each stage of execution." Fusco also participates in executive

level round tables with Rocket, because Rocket believes in embodying the value of collaboration at the highest levels.

Rocket is available to ensure M&T meets its timelines for solution deployments, in spite of the threat of challenges that arise when introducing a considerable amount of change to an environment. For example, when a high-importance case was opened, and an issue arose with the DIH project, Rocket's customer service team quickly responded with solutions, and worked to remedy the issue.

Powe says, "After I opened the case, I got a call right away from Rocket support. We discussed it, and they let us know the quickest resolution. They also accelerated the fixes because they knew how critical this was to us. Now, we'll still be able to hit our timeline."

As M&T continues to expand and transform, it needs systems that can scale accordingly. With Rocket as a partner, there is already an established relationship to help inform this vision and strategy. M&T can rely on this partnership when sourcing solutions and setting the roadmap for future initiatives, such as its plans to improve reporting capabilities.

Modernization is not just about having the right tools, though. The biggest challenges often arise in shifting the organizational mentality surrounding transformation, which is why Rocket prioritizes sharing ideas through collaboration and communication to facilitate innovation. Rocket accommodates the evolving needs of customers with big plans to deliver the flexibility they need in the future and will continue to support M&T in its mission to "never be too big to care."

Impact

- 1 Heightened Awareness** – Introducing a considerable amount of change to an environment can lead to obstacles, but Rocket makes accommodations quickly to ensure partner success.
- 2 Open Communication** – Rocket's partnership helped M&T to meet timeline goals with transparent and collaborative communication.
- 3 Meeting Milestones** – Testing and training with staff built the relationships and skills for M&T's teams to be ready to deploy the solution effectively.
- 4 Superior Customer Service** – Customer service is a top priority for Rocket, so M&T knew it could expect responsiveness and speedy answers to any question.



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