SUNTRUST

EIS / MIST 4700
Summer 2002

Internship Report

By

Suhail A. Halai

Guiding Faculty: Dr. Jay E. Aronson

Executive Summary:

This report focuses on giving an insider view of the end-user IT department within SunTrust Banks. It highlights the differences and the similarities between the real world and the academic world of MIS.

As Information Technology begins to play an ever-increasing role in the survival of the modern enterprise, client support emerges as the most critical and often ignored function of the technology environment within the modern organization.

The Client Technology (CTS) division of the Technology Operations and Services Division (TOSD) serves this critical function for SunTrust across several locations and Strategic Business Units (SBUs)

My internship experience with CTS Atlanta Non Branch taught me several key values necessary for the success of an IS professional, including the spirit of teamwork, as well as a deep respect for the client. Most importantly, I learnt to think about IT from the client's perspective - the purpose of IT.

Table of Contents:

Internship Background:

I was selected for my internship at SunTrust via the EIS Summer Internship program sponsored by the MIS department at UGA.

I worked starting May through August 2002. I filled the vacant position of a full-time CTS consultant at the CTS Atlanta Non Branch Division. The internship aimed at allowing a fresh candidate to get an insight view of how the "Support" function of IT works. Since I replaced a fulltime professional, I was in the middle of a full-fledged operation from the first week itself.

The best feature of my internship was the access it gave me to a really motivated, hard-working, team of highly knowledgeable IT professionals. The most important skill I learnt was the ability to work in a Team. I also picked up considerable skills in handling team communication, training others, getting trained myself, and the ability to adapt to the ever-changing IT scenario. The technical aspects of my experience included Documentation, Networking, PC Troubleshooting, Customer Support, Inventory Management, etc.

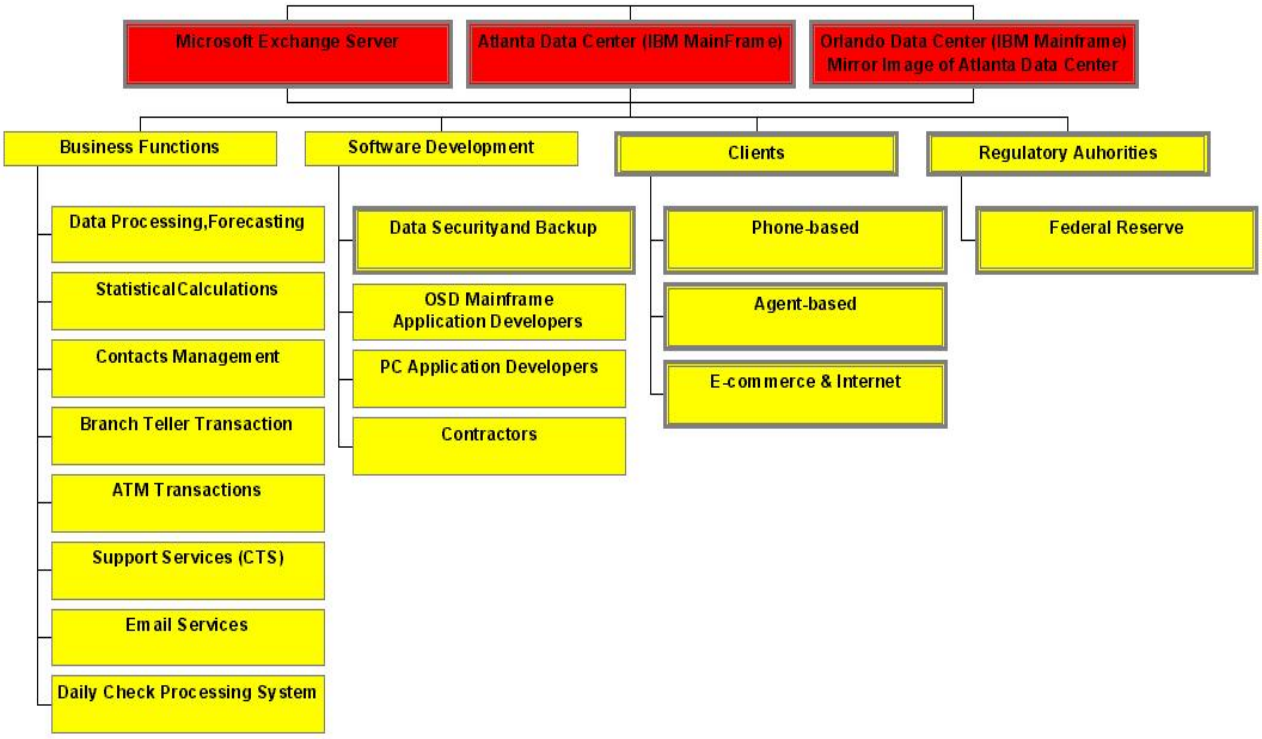
About SunTrust:

SunTrust Banks, Inc., headquartered in Atlanta, Georgia, is one of the nation's largest commercial banking organizations. As of March 31, 2002, SunTrust had total assets of $106.2 billion and total deposits of $69.5 billion.

The company operates through an extensive distribution network in Alabama, Florida, Georgia, Maryland, Tennessee, Virginia and the District of Columbia and also serves customers in selected markets nationally.

SunTrust's primary businesses include deposit, credit, trust and investment services. Through various subsidiaries, the company provides credit cards, mortgage banking, insurance, brokerage and capital markets. SunTrust offers a full line of consumer and commercial banking services to more than 5.5 million customers through more than 1,100 branches and 1,900 ATMs across six states - Alabama, Florida, Georgia, Maryland, Tennessee and Virginia as well as the District of Columbia. Its primary businesses include traditional deposit and credit services as well as trust and investment services. Through various subsidiaries SunTrust provides credit cards, mortgage banking, insurance, brokerage and capital market services. (“About SunTrust”)

The SunTrust Information Network:



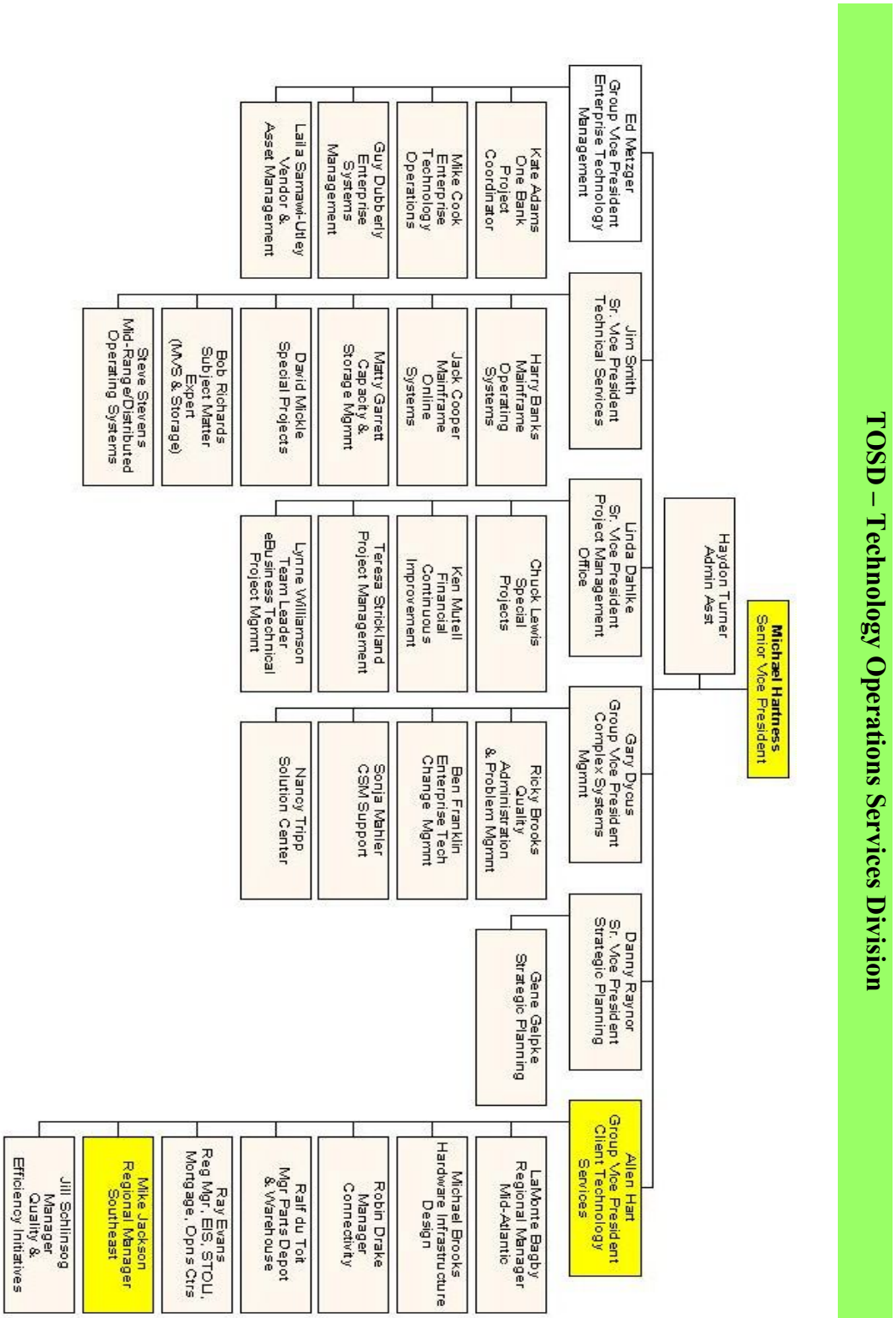
Part of the Larger Picture:

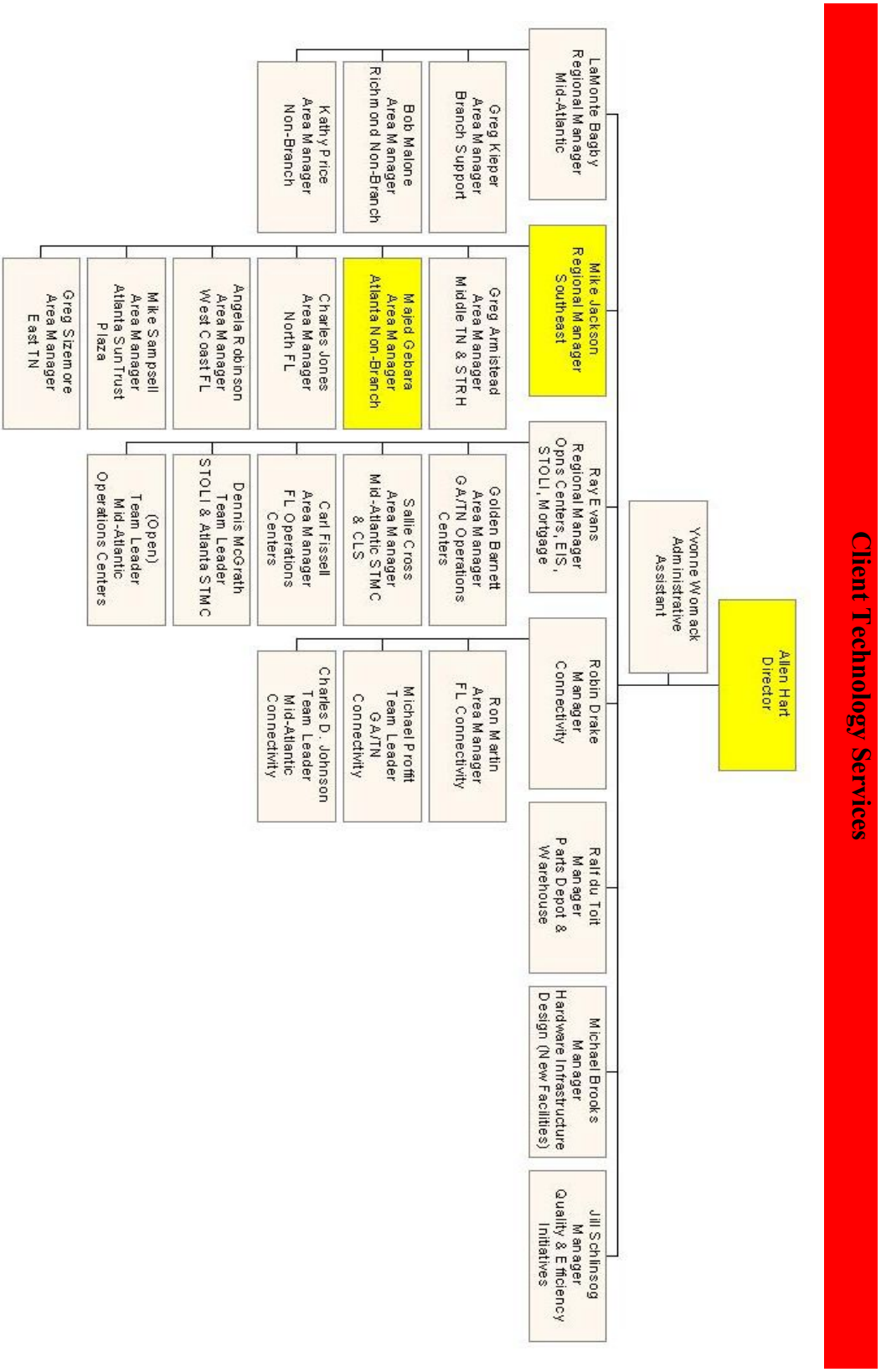
In the IT domain, CTS serves the entire SunTrust group including its wholly owned subsidiaries. The Atlanta Non Branch division of CTS caters to four buildings housing various SunTrust divisions in the Atlanta downtown area near Five Points.

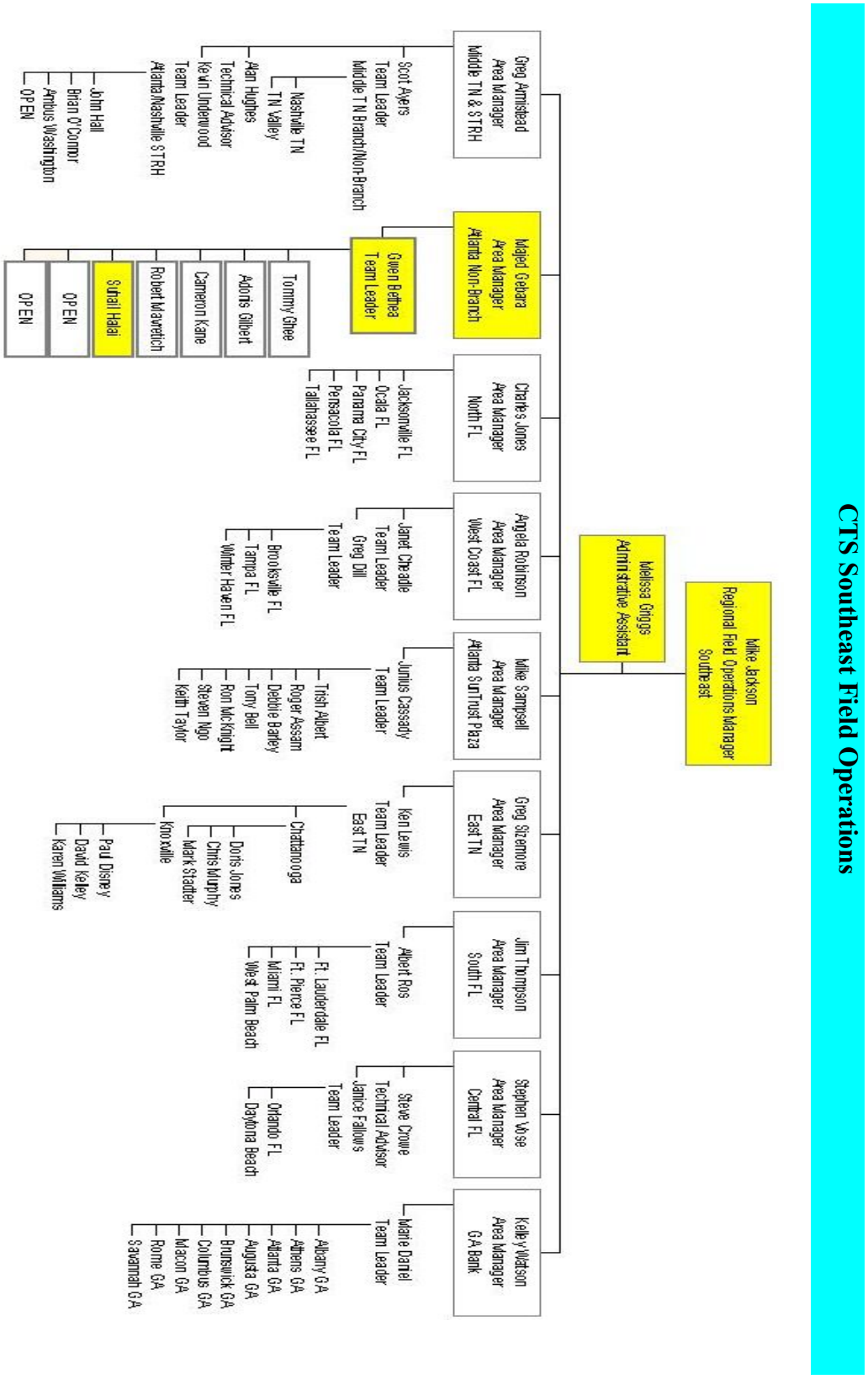
Client Technology Services (CTS) is dedicated to providing superior PC support for all Georgia Branch and InStore locations. CTS provides a number of services including resolving PC related problems, software installation/removal, hardware installation/removal and consultant services. In order to provide quicker response to problems, the CTS team is located through out the Southeast.

The following organizational charts explain the organization of the IT operations and where CTS fits in. These charts also explain how and where I fit into the larger picture of SunTrust Banks.

Note: Yellow is used to highlight the hierarchy of my supervision.


TOSD – Technology Operations Services Division
Michael Hartness
Senior Vice President
Haydon Turner
Admin Asst
Ed Metzger
Group Vice President
Enterprise Technology
Management
Kate Adams
One Bank
Project
Coordinator
Mike Cook
Enterprise
Technology
Operations
Guy Dubberly
Enterprise
Systems
Management
Laila Samnawi-Utley
Vendor &
Asset Management
Jim Smith
Sr. Vice President
Technical Services
Harry Banks
Mainframe
Operating
Systems
Jack Cooper
Mainframe
Online
Systems
Matty Garrett
Capacity &
Storage Mgmnt
Bob Richards
Subject Matter
Expert
(MVS & Storage)
Steve Stevens
Mid-Range/Distributed
Operating Systems
David Mickle
Special Projects
Linda Dahlke
Sr. Vice President
Project Management
Office
Chuck Lewis
Special
Projects
Ken Mutell
Financial
Continuous
Improvement
Teresa Strickland
Project Management
Lynne Williamson
Team Leader
eBusiness Technical
Project Mgmnt
Gary Dycus
Group Vice President
Complex Systems
Mgmnt
Ricky Brooks
Quality
Administration
& Problem Mgmnt
Ben Franklin
Enterprise Tech
Change Mgmnt
Sonja Mahler
CSM Support
Nancy Tripp
Solution Center
Danny Raynor
Sr. Vice President
Strategic Planning
Gene Gelpke
Strategic Planning
Allen Hart
Group Vice President
Client Technology
Services
LaMonte Bagby
Regional Manager
Mid-Atlantic
Michael Brooks
Hardware Infrastructure
Design
Robin Drake
Manager
Connectivity
Ralf du Toit
Mgr Parts Depot
& Warehouse
Ray Evans
Reg Mgr, EIS, STOU,
Mortgage, Opns Ctrs
Mike Jackson
Regional Manager
Southeast
Jill Schlinsog
Manager
Quality &
Efficiency Initiatives


Client Technology Services
Allen Hart
Director
Yvonne Womack
Administrative
Assistant
LaMonte Bagby
Regional Manager
Mid-Atlantic
Greg Kieper
Area Manager
Branch Support
Bob Malone
Area Manager
Richmond Non-Branch
Kathy Price
Area Manager
Non-Branch
Mike Jackson
Regional Manager
Southeast
Greg Armistead
Area Manager
Middle TN & STRH
Majed Gebara
Area Manager
Atlanta Non-Branch
Charles Jones
Area Manager
North FL
Angela Robinson
Area Manager
West Coast FL
Mike Sampsell
Area Manager
Atlanta SunTrust
Plaza
Greg Sizemore
Area Manager
East TN
Ray Evans
Regional Manager
Opns Centers, EIS,
STOLI, Mortgage
Golden Barnett
Area Manager
GA/TN Operations
Centers
Sallie Cross
Area Manager
Mid-Atlantic STMC
& CLS
Carl Fissell
Area Manager
FL Operations
Centers
Dennis McGrath
Team Leader
STOLI & Atlanta STMC
(Open)
Team Leader
Mid-Atlantic
Operations Centers
Robin Drake
Manager
Connectivity
Ron Martin
Area Manager
FL Connectivity
Michael Proffit
Team Leader
GA/TN
Connectivity
Charles D. Johnson
Team Leader
Mid-Atlantic
Connectivity
Ralf du Toit
Manager
Parts Depot &
Warehouse
Michael Brooks
Manager
Hardware Infrastructure
Design (New Facilities)
Jill Schlinsog
Manager
Quality & Efficiency
Initiatives


CTS Southeast Field Operations
Mike Jackson
Regional Field Operations Manager
Southeast
Melissa Griggs
Administrative Assistant
Greg Armistead
Area Manager
Middle TN & STRH
Scot Ayers
Team Leader
Middle TN Branch/Non-Branch
Nashville TN
TN Valley
Alan Hughes
Technical Advisor
Kevin Underwood
Team Leader
Atlanta/Nashville STRH
John Hall
Brian O'Connor
Ambus Washington
OPEN
Majed Gebara
Area Manager
Atlanta Non-Branch
Gwen Bethea
Team Leader
Tommy Ghee
Adonis Gilbert
Cameron Kane
Robert Mavretich
Suhail Halai
OPEN
OPEN
OPEN
Charles Jones
Area Manager
North FL
Jacksonville FL
Ocala FL
Panama City FL
Pensacola FL
Tallahassee FL
Angela Robinson
Area Manager
West Coast FL
Janet Cheadle
Team Leader
Greg Dill
Team Leader
Brooksville FL
Tampa FL
Winter Haven FL
Mike Sampsell
Area Manager
Atlanta SunTrust Plaza
Junius Cassady
Team Leader
Trish Albert
Roger Assam
Debbie Barkley
Tony Bell
Ron McKnight
Steven Ngo
Keith Taylor
Greg Sizemore
Area Manager
East TN
Ken Lewis
Team Leader
East TN
Chattanooga
Doris Jones
Chris Murphy
Mark Stadler
Knoxville
Paul Disney
David Kelley
Karen Williams
Jim Thompson
Area Manager
South FL
Albert Ros
Team Leader
Ft. Lauderdale FL
Ft. Pierce FL
Miami FL
West Palm Beach
Stephen Wise
Area Manager
Central FL
Steve Crowe
Technical Advisor
Janice Fallows
Team Leader
Orlando FL
Daytona Beach
Kelley Watson
Area Manager
GA Bank
Marie Daniel
Team Leader
Albany GA
Athens GA
Atlanta GA
Augusta GA
Brunswick GA
Columbus GA
Macon GA
Rome GA
Savannah GA

Basic Job Function:

All requests for support are directed to the Solution Center and a ticket number is obtained. The problem is then reported to the appropriate support group and resolved quickly. If the problem is of an urgent nature, the Solution Center Analyst records the ticket as a Severity One. Users normally send a request to the Solution Center via the corporate intranet or by email

If there is a service request (new equipment and software orders, installations and equipment moves), users use the online request system by choosing "Hardware/Software - ordering" from the Common Task and Information sites. New equipment and software orders require previous approval from Branch Operations.

The Help Line (part of Community Banking Support) is also available to assist with procedural, policy, and operational questions.

Besides providing the above-mentioned services, the CTS team also dealt with several projects on an on-going basis - often executing several projects at the same time.

Notes:

During my internship period, the division handled 425 requests in July. This was double the average number of requests handled by any other CTS division. I received a lot of appreciation for help with the streamlining of workflow in the team.

Some of my personal activities (including those beyond my basic job description):

1. Provide end-user support in a friendly, comforting and prompt manner
2. Explore and recommend alternatives to current implementations and technologies
3. Documentation of the usage of the software / hardware
4. Develop usage instructions for end-users
5. Testing new software for compatibility
6. Installation of software for end-users
7. Provide trouble-shooting / consultation to end-users
8. Maintaining the data network
9. Implementation of a company-wide VPN project, within departmental scope
10. Perform server maintenance / backups
11. Ensuring compliance of equipment usage with company guidelines.
12. Setting up IT resources for new and current employees
13. Assist with “moves” – physical relocation of users.
14. Contribute to the company’s technical-support knowledge database
15. Placing orders for new components / equipment
16. Placing orders for new software or updates if necessary.
17. Inventory tracking and record-maintenance

The job was a mix of one-on-one tasks as well as multiple team-oriented projects, which were often implemented simultaneously. The CTS team was also responsible for facilitating company-wide IT implementations from other IT groups within SunTrust.

The Real World: An Observation

The book I chose for comparison with my on the job experience, was “The Adaptive Enterprise” by Bruce Robertson and Valentin Sribar. The book makes a strong argument for development of the IT infrastructure in an organization to be flexible enough to accommodate the ever-changing nature of technology.

They explain that the reason organizations need an adaptive infrastructure is simple: More change happens in business than IT or the business can anticipate. To cope with the many unforeseen circumstances and competitive demands, businesses must create and possess a certain flexible, adaptive range. (Robertson and Sribar 1)

I observed that the IT culture at SunTrust was very conservative. Perhaps the driving force behind this was the fact that it was a financial institution. The IT function was under constant pressure to reach a compromise between prohibitive costs of adopting new technology and the benefits of implementing a standardized IT structure. It made sense for SunTrust to be careful not to add too many bells and whistles to their existing IT processes. The entire organization does not run on Oracle, or MS-SQL, but rather it still depends on IBM mainframes and OS/2. Mike Hartness, Senior Vice President of TOSD, was particularly proud to mention this fact during the intern meeting. He also made a point to mention that they probably did not need to upgrade to newer systems currently available in the market since they had already tested several of them and found them to be inferior to their existing structure. SunTrust succeeds in its

endeavor to manage fluidity within the business by walking two steps behind in terms of technology. It exercises great caution before rushing to the cutting edge of technology.

Robertson and Sribar define three areas that should not be overlooked in designing an Adaptive Infrastructure (Robertson and Sribar 10):

- Technology
- People
- Process

SunTrust exhibits a good management of technology. As explained above, it plays defensive and ensures that it always gets the most matured products. The "silver bullet syndrome" is virtually non-existent. The company takes a lot of effort in ensuring that the People within the organization are well informed about the newer technologies. This effort extends beyond the IT line of service to the various user groups too. In terms of process control, the company fares averagely, since it is yet to completely standardize its IT practices (although one cannot ignore efforts by senior IT managers to collaborate and develop standards and benchmarks).

Case: The Edge Project:

During my internship, the CTS team implemented several changes to the "contacts management system", replacing "Act" with the "Edge" from Intellisync Corp. I noticed that this had significant impact on the end-users functionality since the infamous "resistance to change" phenomenon was in effect, although for a short time. In the adaptive infrastructure strategy, packaging and people issues are two of the most critical issues involved in making new

infrastructure successful. (Robertson and Sribar 207). Since the software in the Edge project was purchased from a vendor, it offered little customization, and the interface was truly unfamiliar in comparison to the older system. Training for this project came slow and caused some complications for the end users resulting in occasional loss of information. Truly, without skillful packaging of services, people on the business side find it hard to come to terms with the fluidity of technology. The packaging not only includes the technology itself, but also the training and the user-initiative that go with it.

Case: The Mass Blowout:

Another interesting case was that of the mass blowouts of the Compaq Monitors during my internship. SunTrust had a strategic tie-up with Compaq (now HP-Compaq) to supply hardware equipment for its internal clients. A particular batch of V55 CRT monitors began to blow up – 15 monitors blew up in a week, more such incidents followed the next few weeks. They all belonged to the same batch. The reason for the blowout was cited as a combination of "end of product life" and "unexpected electric surges". This incident added unexpected strain on a team already pressed for time. Can such unexpected incidents be predicted? It might have been possible for SunTrust to partner with Compaq to have a recycling program where after the expected end of product life, the equipment could either be refreshed or replaced to ensure smoother operations. Such a partnership could perhaps be in store for SunTrust when it truly integrates its IT management with its vendors.

References:

- "About SunTrust". SunTrust's Corporate Website. 2nd October 2002. <http://www.suntrust.com>
- Robertson Bruce and Sribar Valentin. IT Best Practices Series: The Adaptive Enterprise. Hillsboro, Oregon: Intel Press. 2002

Weekly Log of Activities:

- May 20

First week of the internship. The first day of the internship was spent at an orientation session, which familiarized all new employees (part time as well as full time) with SunTrust as a company. Grand welcome by the manager Majed Gebara, Area Manager of CTS–Atlanta, Non Branch, Division. I was introduced to the rest of the team over the week, since most of them were on leave at different times. This gave me a good opportunity throughout the week to get to know each member individually, to know his or her individual strengths (and weaknesses). The rest of the week was spent familiarizing my self with the different systems that CTS had developed in the 5 years of its evolution since the Y2K problem.

- May 27

I was assigned the first major project of my internship: “The VPN project”. I was assigned the task of installing the software on laptops, and conducting training sessions for each of the (roughly 200) employees across different groups within the company. This project was a great opportunity to interact with several high-ranking personnel within the company including the President, E. Jenner Wood. I received a direct compliment from the President’s Office! This was conveyed to me by Majed himself. It really made my day. I (almost) single handedly managed the entire VPN project.

- June 3

The VPN project is still in progress. Running parallel to it, I am also handling routine customer support requests, including connectivity issues, network privileges, printer problems, and parts and supplies requests. I am also busy creating my own library of tools to help optimize the functioning of the department. I begin to get noticed. Everyone is impressed by the progress I have made in such a short time.

- June 10

VPN project still running full steam. Handled about 20 installations so far. A very hectic week, since the team is working with only 3 employees – half manpower. And the phone never stops ringing!

- June 17

About 45 VPN Clients handled so far. At this point, the pressure was getting way out of hand. I decided to create a mass mailing list from the employee-contacts database. This helped in scheduling several VPN sessions in a day without having to deal with the frustration involved with manual repetition. Conducted a self-initiated analysis of an effective procedure for mass installations over standardized configurations. This initiative was highly appreciated by the two people who defined my role in the team – Majed as well as Gwen my immediate supervisor. By this time, I had proven my ability to liaison with clients.

- June 24

I noted deficiencies in the configuration of a majority of PCs in use in the workplace. I developed a registry-level configuration to fine tune performance of PCs running Windows. Made sure the configuration was replicated across all machines that came in contact with the team through the VPN project. I trained teammates on some Windows optimizing techniques.

- July 1

This week monitors started blowing up everywhere. I handled 15 cases through the week. I further investigated the reason for mass blowout. The reason turned out to be a combination of age and an overnight power surge. These monitors were Compaq V55's purchased in one batch. Great level of quality control! The VPN project looks like it is nearing its end, when a surprise group of 30 users pops up from nowhere.

- July 8

The Team Leader, Gwen Bethea alerts the team about the pending VPN project recipients. Since 30 new users emerge, the team is impacted greatly. The team receives heads up on the next major enterprise-wide project "The Edge".

- July15

Gwen unveils "The Edge". The project needed installation of 4 different softwares on over 600 computers throughout the Atlanta Non Branch division. Team starts collecting information needed for The Edge. VPN is still running in the background and the monitors are still blowing up too!

- July 22

The team is faced the unenviable task of physically touching 600+ computers, once each for the 4 different softwares that need to be installed. The team is further faced with an average team size of 4 people over the next 3-4 weeks, due to "paid leaves" by different members throughout the next month. The VPN project is still running on the backburner. The deadline for the Edge is approaching soon.

- July 29

VPN requests are diminishing. Gwen brings the team together to discuss strategies to tackle the project in the limited time. The team decided to work overtime. Gwen painstakingly developed a "best practices" guide for the project. I worked very hard at cleaning up the software dump on the departmental server, cataloging and classifying the various files into different software types as well as device drivers.

- August 5

The Edge dominates CTS's primary support activities. Low priority jobs are postponed. The team literally sweated it out on this project. Information moved like lightning. Lots of intelligence created and shared during this project. The team finished the project before time, leaving enough time to take care of stray cases of misconfigured software. The team wins high praise for the job from the upper management and the users alike.

- August 12

This was my last week at SunTrust. The compliments kept flowing for the team. Truly, it felt like I had been able to make a difference. I received a lot of individual compliments too. I was also busy preparing information sheets so that the team would be informed about the changes I have made so far. I spent a lot of time documenting best practices as I had observed from different members of the team.

Meet The Team!

The Fantastic Seven!

SunTrust CTS – Atlanta Non Branch

Front: Gwendolyn Bethea (Team Lead) and Majed Gebara (Area Manager)
From Left: Bob Mavretich, Donnie Gilbert, Suhail Halai, Tommy Ghee and Cameron Kane

Evaluation from Supervisor:

SunTrust does not permit direct personal evaluations. However, through the HR department, it provides for a general evaluation of employees by their supervisor. The evaluation from my supervisor, Gwen Bethea, follows on the next page.