

Banking & Finance

United Kingdom

A UK financial services firm tracked every operational incident from report to resolution

A financial services enterprise replaced email, calls and manual escalation with tracked incidents, each with a priority, an owner and an escalation path, across offices and support teams.



AT A GLANCE

INDUSTRY

Banking and financial services

REGION

London, with operations across Europe

SIZE

Multiple offices and operational centers

PREVIOUSLY

Email, calls, manual escalation

FEATURES USED

Work

Insight

01 The client

The client is a large financial services enterprise headquartered in London, with offices and operational centers across Europe.

Its business depends on systems, offices and teams that keep running. When something goes wrong, business, technical and support teams all have a part in the response, and delays reach customers quickly.

02 The challenge

Incidents were reported, but the response ran on emails, calls, manual escalation and coordination between many people. Without structured tracking, resolution was slow and the same disruptions came back.

- Incidents were reported and escalated by email and phone.
- Ownership was unclear once several teams were involved.
- Critical incidents were not escalated consistently.
- Nobody had a clear view of incident status, priority or progress.
- Repeated disruptions were hard to spot and prevent.

03 What they set up in Asset Infinity

The enterprise centralized incident reporting and tracking in Asset Infinity's Work feature, with priorities by operational impact, named owners and escalation for critical incidents.

Work

One place to report

Staff in any office raise an incident from the web or mobile app, choosing its category, so every incident is recorded the same way.

Work

Priority by impact

Incident priorities are defined by operational impact and response need, and each priority carries its own SLA response and resolution targets.

Work

Owners and escalation

Each incident is assigned to the right technical or operational team. Critical incidents that wait too long escalate to a supervisor.

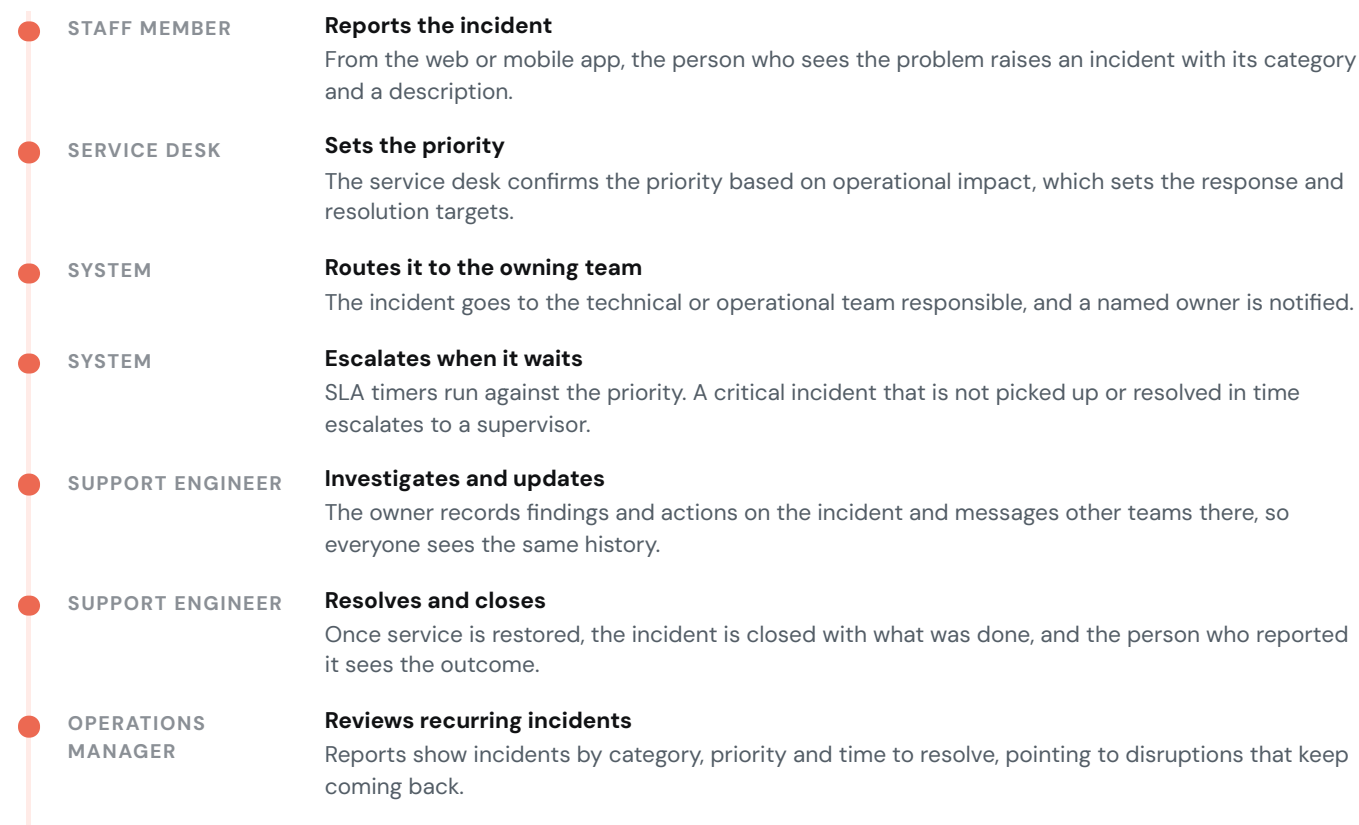
Insight

Incident status at a glance

Dashboards show open incidents by priority, owner and status, and reports show which categories keep recurring.

04 How it works day to day

Here is how an operational incident is handled now.



05 Before and after

	BEFORE	WITH ASSET INFINITY
Reporting	Emails and calls	One incident record from web or mobile
Priority	Decided case by case	Set by operational impact
Ownership	Unclear across teams	A named owner on every incident
Escalation	Manual, inconsistent	Automatic for incidents that wait too long
Visibility	Limited	Status, priority and progress on dashboards
Repeat disruptions	Hard to spot	Recurring categories visible in reports

06 How it rolled out

1

Response practices reviewed. The team reviewed incident categories, response practices, escalation gaps and past disruptions.

2

Priorities, owners and escalation set up. Priorities, team assignment and escalation paths were configured for business, technical and support teams.

3

Teams trained and refined. Teams were trained on reporting, tracking, escalating and resolving incidents. The setup was refined as it was used.

07 The results

- Faster identification, assignment and response to operational incidents
- Support teams coordinated through clear incident ownership
- Clearer visibility into incident status, priority and progress
- Less disruption to critical business operations
- Stronger response discipline across business, technical and support teams

08 Why it worked

Priority by impact

Defining priorities by operational impact meant the most disruptive incidents got the fastest response.

Escalation that does not wait

Critical incidents escalate on a timer, so they no longer depend on someone remembering to chase them.

One history per incident

Findings, actions and messages stay on the incident, so teams coordinate in one place and later reviews have the full story.

09 Looking ahead

The enterprise moved from fragmented incident handling to one way of reporting, assigning, prioritizing, escalating and resolving incidents across its offices.

With every incident recorded by category and impact, teams can see which disruptions recur and act on the cause, which supports business continuity over time.

See it on your own assets

A 30-minute demo, set up for a bank or financial services firm.

The client's name is withheld for confidentiality. Results are as reported by the client.

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