



Altus

clear thinking for Financial Services

Altus EA Framework

Financial Service companies have a lot to gain from Enterprise Architecture. Intangible products that need servicing for decades, relentless (and often retrospective) regulatory change, plus a long history of complex M&A have all led to increasingly complex business and technology landscapes. The benefits of understanding how all the parts of this corporate machine fit together before embarking on change are clear to see.

There's plenty of EA theory on how best to model a business too. Unfortunately, much of it is general, overly technical and tends to treat architecture as the key driver of business change. The reality is that change is driven by business projects and architecture needs to work in that context, helping business users to deliver the change they need via projects.

The Altus EA Framework is designed to do just that. Developed specifically for Financial Services, the framework is based on two key principles; that pictures are the best way to explain complexity and that different types of project need different types of pictures.



The Issue

Enterprise Architecture has a lot to offer Financial Services but is often dismissed as abstract theory by much of the business audience it ought to serve.

Lengthy debates over metamodels, daunting levels of information to capture, and a lack of business content have all combined to make EA look like an obstacle to change rather than an enabler.

The Altus Approach - Visualisation

As specialists in EA for the Financial Services industry, Altus have observed many approaches to architecture and we have learned what works. Our EA Framework draws on the best of what we have seen plus our own unique insights into what makes Financial Services different.

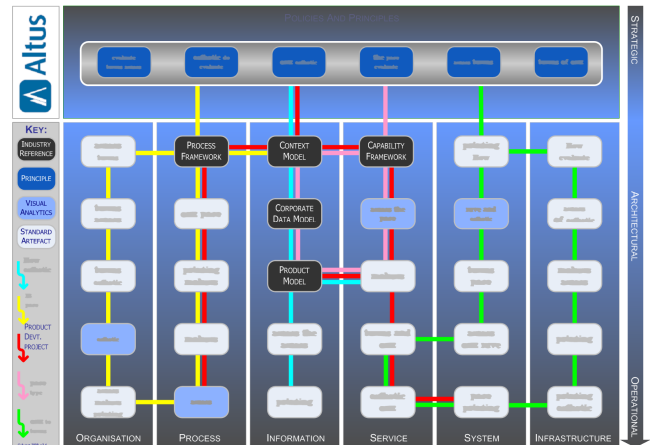
The first of those insights is about pictures. In an industry which relies completely on technology but where decision-makers are rarely technologists, there is a pressing need to distil complex business and system issues to the bare minimum required for busy project sponsors to make informed decisions.

In our experience by far the best way to do this is through pictures, and the Altus EA Framework is the embodiment of that philosophy. Presented as a simple grid, the framework is essentially a picture of pictures – designed to provide a visual summary of all we know about the key aspects of a business via a single page.

Financial Services Content

The pictures are not just theoretical; Altus provide a library of templates and examples which represent the most useful visual techniques we have found to help FS projects deliver. The first step in developing

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a client-specific framework is to select the right pictures for an organisation from this library or indeed to extend it to reflect the client's own modelling standards.

For several of the key elements, such as Business Capability, Business Process and Corporate Data, Altus also provide sector reference models – summarised in iconic single-page diagrams but complete with all the rigorous analysis which underpins them.

Project Types

Another key feature of the Altus EA Framework is the concept of project type. Much of the literature around EA tends to view business projects as generic vehicles for delivering architectural change. Architecture models are seen as the real unit of work, and management of them is the focus.

In reality, it is business projects which drive change and they are certainly not generic in terms of the architecture support they require. A project to establish a new contact centre will need to consider very different issues from one which is upgrading the corporate desktop operating system.

Project Types (cont.)

Whilst every project is different, they can be classified into a relatively small number of distinct types each with its own requirements in terms of useful architecture models. The coloured lines on the Altus EA Framework diagram show some of the most common project types we encounter in Financial Services and connect the pictures which will help that type of project to deliver. These lines are customised for each client in early workshops to reflect the change portfolio and the models to be emphasised.

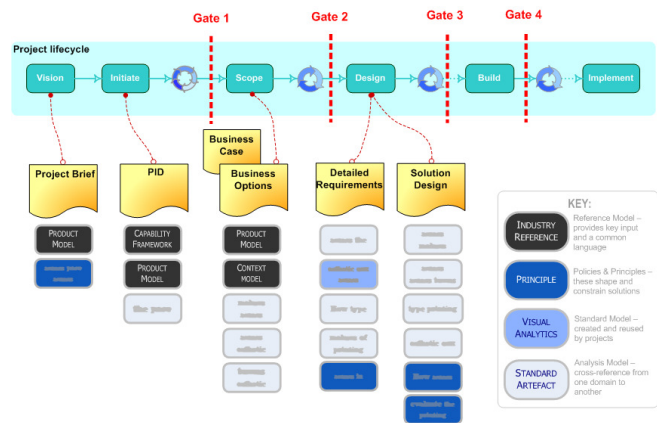
Project Lifecycle

The last piece of the jigsaw puzzle is the project lifecycle. Having recognised that projects are the engine of change, we must acknowledge that most large FS companies already have a defined project lifecycle and a method for managing them too. In order for architecture to support projects, it must fit in with both these, and project types can help.

Project Management methods, such as PRINCE, are general purpose, and focus on the mechanics of controlling a project rather than the specific content. Most organisations have defined a project lifecycle with placeholders for the content, such as requirements specs, design documents and business cases. Altus EA Framework project lines, as we have seen, show us what kind of content is useful for each type of project. By simply mapping this architecture content to the appropriate project document, we can help projects identify the right models they will need to do their work.

In the process, business projects incrementally build an EA Framework, reusable by future projects, without the need for any grand EA programme.

Example Project Lifecycle - New Proposition



The Benefits

Architecture is not a new invention and there are many examples of projects benefitting from clear architectural thinking. Unfortunately, the vast majority of that work gets buried in the archive and forgotten once the project is completed.

An integrated architecture framework enables a business to reuse the good work of one project on those which come after it and, in the process, to build up a complete picture of the business from all the important angles.

The highly visual nature of the Altus EA Framework makes it accessible to more than just architects and the rich FS content in our reference models means that the business will see real value from the outset.

And last but not least, by building up the detail incrementally through projects we ensure the framework continues to be relevant rather than turning into an expensive white elephant.



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Altus understand Financial Services - the products, the processes, the people and the systems that make the whole thing tick. With years of experience in complex change programmes, we understand that successful solutions begin with the business.

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