



# Altus

clear thinking for Financial Services

## EA Tools Quick-Start

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Whether you are considering buying an EA Tool or you have already have one, you can be excused for wondering how best to use it. The good news is that most tools are so powerful you can do almost anything. But that's the bad news too; with a tool so sweeping in its scope, where do you start? On the one hand you'd like to keep your options open but on the other there is a need to focus on the immediate challenges that inspired you to purchase it.

And those challenges are particularly tricky in Financial Services. With a mixture of strategic and legacy business systems, a complex mesh of business processes and capabilities all involving multi-dimensional relationships spanning brands, products and distribution channels, modelling any aspect of a financial services business requires careful thought and planning.

As business and system architecture consultants operating exclusively in the Financial Services sector and with a long history of working with EA Tools, Altus are perfectly positioned to help. So, if you have recently purchased one, or you have a tool and don't feel that you are getting the benefits you expected, then this Quick-Start (or Quick-Restart) guide is for you.



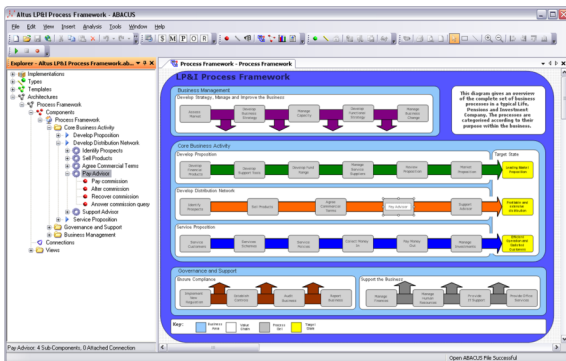


# EA Tools Quick-Start

## EA Tools Quick-Start in Ten Steps

Quick-Start focuses on a particular area of your organisation, fast-tracking adoption of EA tools by addressing a specific business need, then using proven techniques to introduce the tool smoothly and quickly. And it is quick - typical engagements are measured in weeks, not months, with the benefits lasting for years.

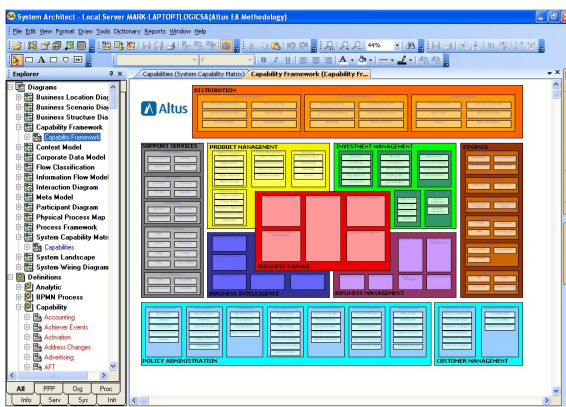
Altus Process Framework in ABACUS



## Familiarisation

Understanding the capabilities of an EA tool and how to best utilise these within your business is essential. Each tool vendor does things slightly differently, Altus has experience with many of them and is in a great position to quickly get up to speed with others.

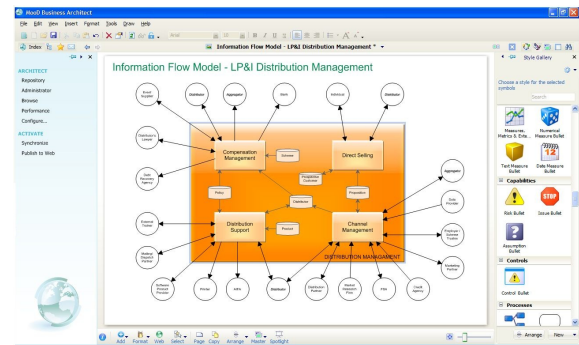
Altus Capability Framework in IBM Rational System Architect



## Target

Identify the most appropriate target business area - one where there are real business needs and where benefits can be delivered quickly.

Context Model in Mood Business Architect



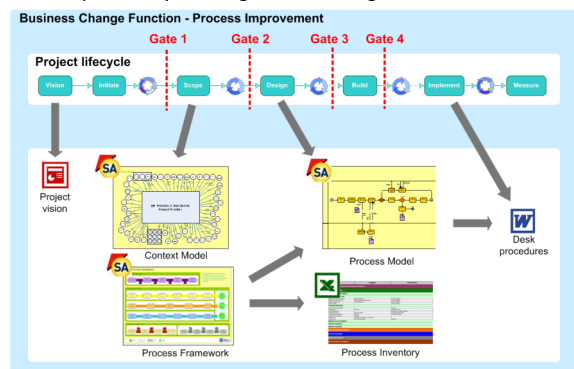
## Scope

Tool initiatives can easily disappear into a labyrinth of meta-model debates. We set immediate boundaries for the initial exercise but with one eye on broader use of the tool in the future and how this is achieved based on our experience.

## Lifecycle

Understand your change lifecycle and decide how the tool will support this - who will produce and consume information in the tool and at what stage in your process. We can visualise all this in an easy to understand lifecycle diagram.

Example Lifecycle diagram showing EA tool interactions

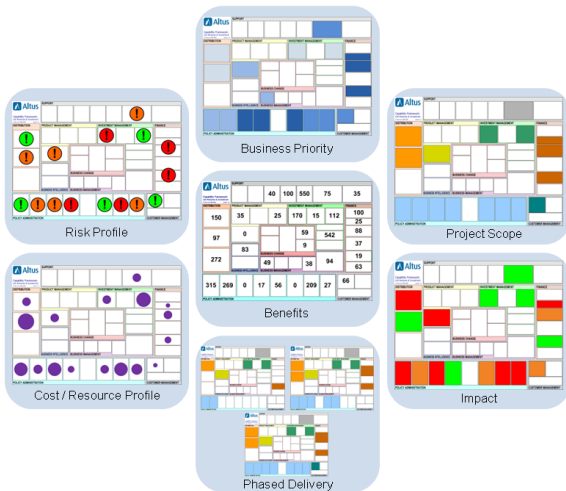


## EA Tools Quick-Start

### Diagrams

Determine the diagrams and output required from the tool and how these link together. We have a stock library of inter-linked FS specific diagrams to get you started.

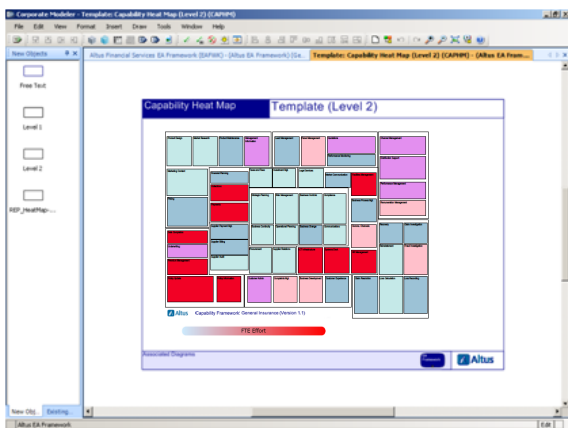
Altus Project/Programme Visualisation Analytics



### Customisation

Using the Altus standard FS meta-model as a baseline we configure the tool, we build diagram templates and tune the whole user environment to support your initial project. EA tools provide a huge range of functionality and it is essential for successful adoption that the tool is 'cut-down' to focus on the business need being addressed.

Altus Capability Heat Map in Casewise Corporate Modeler



### Conventions

Agree standard naming conventions and determine how multiple views of the repository (typically 'as-is' and 'to-be') will co-exist. Due to the inherent flexibility of many tools, these conventions do not come out of the box and need to be thought through for your business.

### Training

The various training courses available provide essential detail of using EA tools in the round. We supplement this with short, tailored sessions focused on specific roles within the business area and their use of the tool.

### Guide & Mentor

We develop a succinct user guide specifically for the customised version of EA tool that you now have. This details the activities and responsibilities of each user role, your environment, your conventions and the diagrams you use. To support the training we provide 'on the shoulder' mentoring, walking through problems with your staff and resolving problems one-to-one.

### Governance

Altus typically remain on-site to assist and support on a part-time basis, reviewing the outputs produced and providing feedback to users, governing the environment to ensure quality and gradually handing over to your own staff at a pace they are comfortable with.

### Benefits

Altus are perfectly positioned to help you maximise the benefits from the EA tools you have or are planning to procure. Preventing an expensive purchase becoming useless 'shelfware', ensuring it is widely adopted and delivers value throughout your organisation for years to come.




## clear thinking for Financial Services

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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