

Enterprise Architecture Tools: Process Modelling all Wrapped up

Our Client

Wrap platform provider

Platform Products

Pensions

Cash Accounts

Stocks & Shares

ISAs

EA Tool

IBM System Architect

Altus Services

EA Tool Operationalisation

Process Discovery

Process Analysis



Background

Wealth management around the globe has been transformed by the advent of Wrap, most notably in the US and Australia. Now it is the turn of the UK. As an innovator in the Financial Services industry, our client is helping to drive this change, establishing a new business unit with a remit to deliver an end-to-end Wrap proposition.

Wrap fundamentally changes the way IFAs service their clients; in effect much of their back office work is outsourced to the provider. Our client's platform is the first proposition to truly reflect this, being specifically built around the needs of advisers. Service will be key and having clearly defined, flexible business processes is seen as essential to the future success of the platform.

Altus Engagement

Our client already recognised the importance of business process to their overall enterprise architecture, but they had not previously used IBM's System Architect - the Group's strategic EA tool - to model processes. Their challenge was to adapt the tool to support the specific requirements of the Wrap programme and train the analyst teams developing the proposition to model processes in SA, using a standard notation (BPMN). And all without impacting the vital timescales of the programme.

As experts in business process, EA and EA tooling, and with an exclusive focus on Financial Services, Altus were ideally placed to 'operationalise' SA.

"Altus's knowledge and skills have been essential in delivering and supporting effective use of the tool within the organisation"

- Client Programme Manager

Proof of Concept

Quickly demonstrating that the tool could meet the client's needs was essential to gain management approval. Rising to the challenge, Altus completed a proof of concept in just five days, producing a practical demonstration in System Architect (based on a set of models already produced by the programme), as well as a clear plan for operationalisation.

The plan included configuration steps, the approach to training, QA and support, key issues and a blueprint for integration with wider Group architecture initiatives and EA meta-model.

"Altus quickly determined the most effective approach to introducing System Architect, at what was a critical point on the programme"

- Client senior Solution Architect

Tool Roll-Out

The approach was well received and Altus were engaged to roll it out across the programme. Key to this was simplicity: liaising closely with the client, Telelogic/IBM and the other SA communities within the client's business, Altus configured SA to reflect only the needs of the programme, hiding additional functionality whilst still ensuring the tool fitted with broader Group requirements.

Another essential Altus deliverable was a bespoke Process Handbook, the 'bible' for analysts, covering the use of the SA environment on the programme, BPMN and including examples of common Financial Services process segments. The handbook also detailed a comprehensive naming scheme for architectural objects within System Architect. EA tools typically do not provide such a scheme out of the box, without which the repository can quickly become chaotic in a multi-user environment.

Altus also provided hands-on training for the analysts - short, practical one-on-one or one-on-two sessions, rather than classroom courses - followed directly by on the shoulder mentoring, on-site support and QA reviews.

On-going Tool Support

A vital part of the Altus engagement was on-going support. This was provided on a flexible, low-cost, low-footprint basis - typically one or two days per week - in order to ensure that the BPMN process maps being produced were of the required standard and the tool repository kept clean and consistent.

Altus took a pragmatic approach to managing quality, highlighting issues through QA reviews and then correcting the repository, rather than imposing heavy-weight restrictions on the analyst's use of the tool. This proved successful and over time standards improved and common mistakes were reduced. Altus worked with the client until a suitable internal resource was found to manage the environment - following a full handover they are now self sufficient.

"Altus played a key role in introducing the BPMN standard for process modelling using System Architect. Their flexibility during the engagement was especially helpful, enabling us to plan training around the needs of the programme"

- Client Business Architect

The Results

EA Tools can be extremely beneficial, but these benefits are not guaranteed. With the help of Altus, our client understood that to be successful a commitment was needed to thorough planning, to tailoring the configuration, to targeted training and to on-going support.

The term 'Wrap Platform' is something of a misnomer - it is not just about the technology. Our client has embraced service as a key part of their proposition. They are now well placed to deliver that service and through a central repository of documented business processes, they will be able to continue enhancing the proposition and respond to the increase in volumes of business that Wrap will certainly bring.

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