

Friends Provident: Connecting Principles to Process



Friends Provident
Life, Pensions &
Investment Management

Key Metrics
PVNBP :~£7,000m
Employees:~5,000



Altus Services
Business Process Analysis
BPMN Modelling
Constraints Analysis
Training & Mentoring



Background

With a clear market entry strategy, a well-conceived Operating Model, and experienced project teams ready to implement change on the ground, Friends Provident were all geared up to push the button on their German market expansion plans.

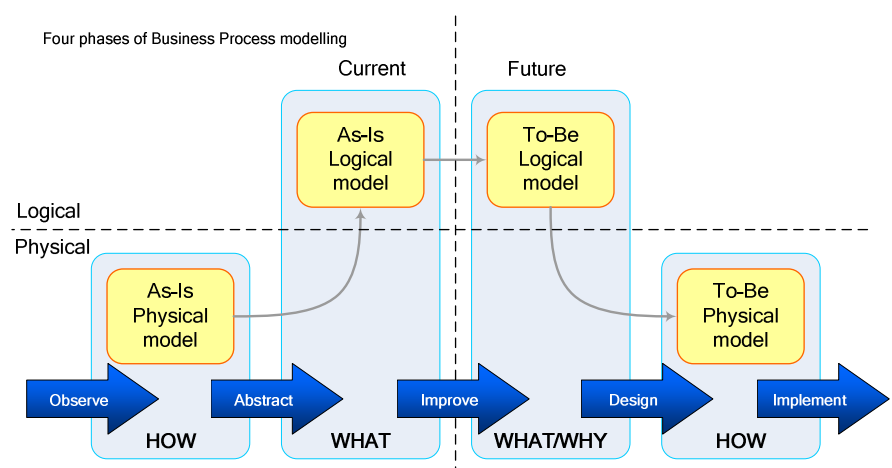
What they needed first though, was clarity on how to link their high-level plans to the tangible, lower-level deliverables required for project delivery (system requirements, out-sourcing contracts, staff working practices, etc).

Altus Engagement

Making the connection between business ideas and operational reality is precisely where Altus add most value with our engineering approach to business architecture.

What Friends Provident needed were clear logical models to define and govern the work of the projects in line with the operating model (which Altus had previously helped to develop). With the focus on organisation and business process, our tried and tested four phase method for process change (see diagram below) provided a ready-made tool for delivery.

The logical layer in this method abstracts *what* the process is doing from the detail of *how* it is done. That abstraction is essential if a business is to free itself from the inevitable baggage of workarounds that build up over the years and make big improvements rather than just tinkering at the margins.



“Another solid piece of architectural thinking from Altus, the work provided us with a thorough approach to process analysis and modelling”

- Tim Blaxall, Head of Business Architecture

Introducing the approach

To prove the value of logical modelling, we began with a pilot project to look at the handling of deaths; one of the most complex and sensitive processes for any Insurer.

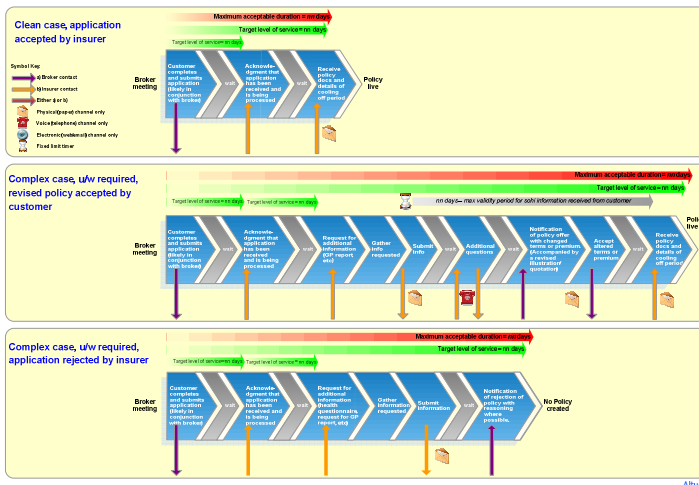
By taking a logical view of what was happening, considering multiple viewpoints and applying Friends Provident's own values and operating principles, we were able to challenge the perception of a death claim as a set of internally focused, product-oriented administrative procedures. Instead, we developed one integrated process, with a strong emphasis on external interactions and which was far more efficient too.

Customer Experience Models

Key to seeing things from an external perspective is a visualisation tool that lets you explore the process from various points of view.

Altus Viewpoint Charts do just that; by taking a particular path through a process and providing a simple, graphical picture of the impact on a particular stakeholder, they enable users to compare different scenarios and adjust the process to improve it for that audience.

At Friends Provident these charts were very successfully employed to explore the customer experience and enable the business to check their process against corporate principles (such as TCF) and business constraints.



"I have to admit this is the first time I have ever seen a truly customer-centric diagram..."

- Matthew Linley (Business Analyst)

Spreading the word

Following the success of the pilot, Altus were engaged to analyse several more complex process areas including New Business, Commission, Claims and Retention. Working with in-house analysts, Altus were able to apply the rigour of logical process modelling (using BPMN notation) to really connect procedures on the ground to the vision in the Operating Model.

The method went down so well that Friends Provident have now decided to adopt it as a central element in their own Business Analysis standards. To support this, Altus have developed a tailored training and mentoring programme, which takes analysts through all aspects of the analysis and modelling cycle from initial research, fact finding and constraints analysis through to the presentation and review of models and viewpoints.

The training courses centre on the fundamental principles of good analysis and modelling with a clear focus on the value of engineering and critical in achieving and maintaining consistently high quality analysis.

"the training made the whole world of analysis clearer, will definitely use the methods in future."

- John Howden (Business Analyst)

Aligned with that training, Friends Provident were also keen to establish an internal accreditation scheme to assess their analyst community and reinforce good practice. Altus were delighted to be involved in defining that scheme and the assessment criteria that accompanies it.

The Results

Friends Provident have now integrated logical process analysis and modelling into their standard approach to change projects and established a strong link between the logical models and business requirements definition.

As a result, the quality of both requirements and the processes themselves continues to improve. All of which means more efficient processes for Friends Provident and a better experience for the customer.

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