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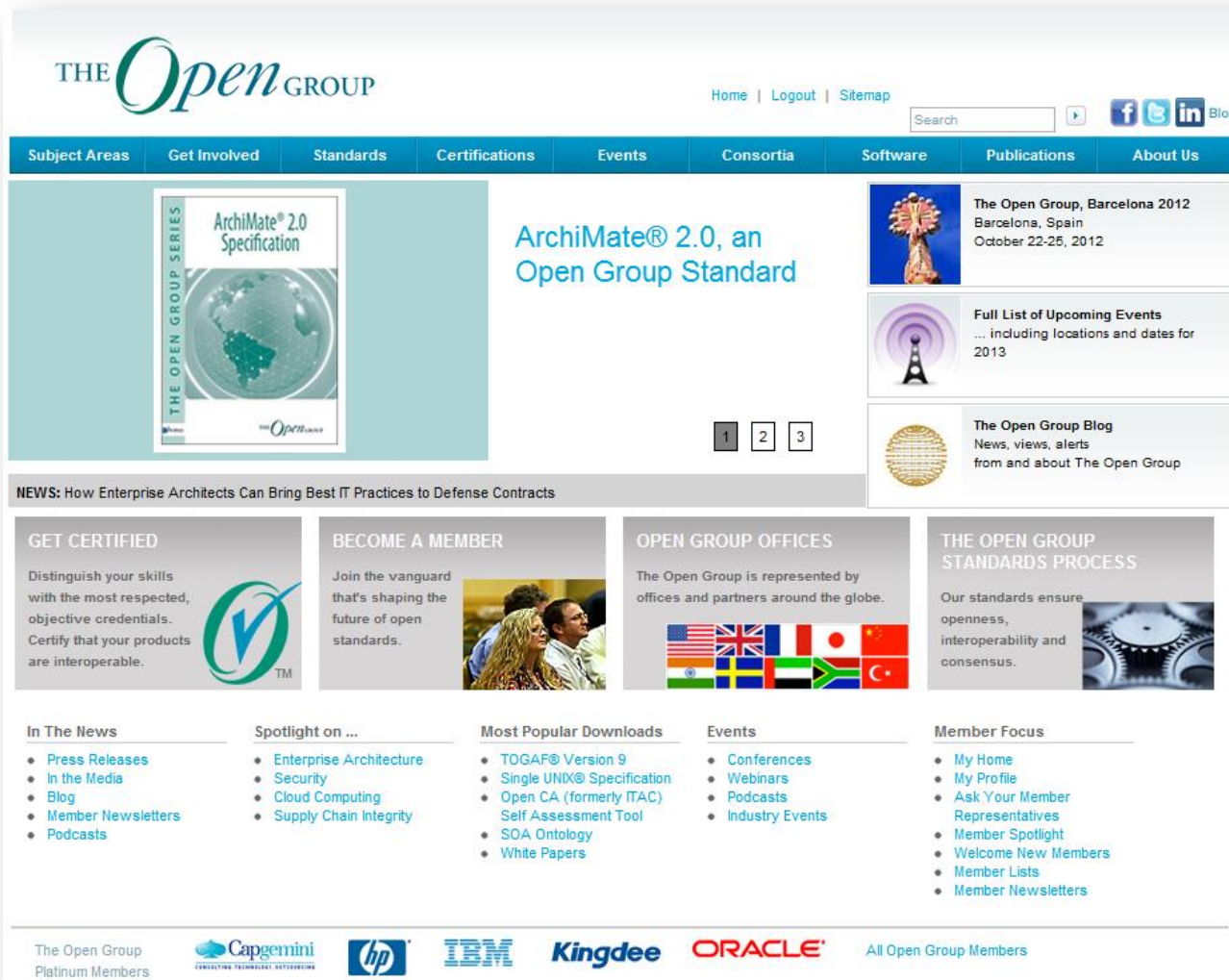
Our upcoming
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FIRSTRAND



FNB's Definition of a Strategic Framework and Operating Model

- ❑ At this month's EA Forum, Hannelie Swanepoel will present a case study of how FNB defined their strategy and operating model following the merger of two data warehousing departments. Hannelie's presentation will focus on FNB's use of architecture principles and methods while highlighting some of their successes, failures and valuable lessons learned.
- ❑ Hannelie Swanepoel joined FNB in 2010 as an Information Architect. Amongst other responsibilities, she played an integral part in defining and implementing the operating model for the newly formed business unit. Hannelie holds an Industrial Engineering degree from the University of Pretoria and is TOGAF® 9 certified.

Strategic Framework And Operating Model

Compiled and Presented by: Hannelie Swanepoel



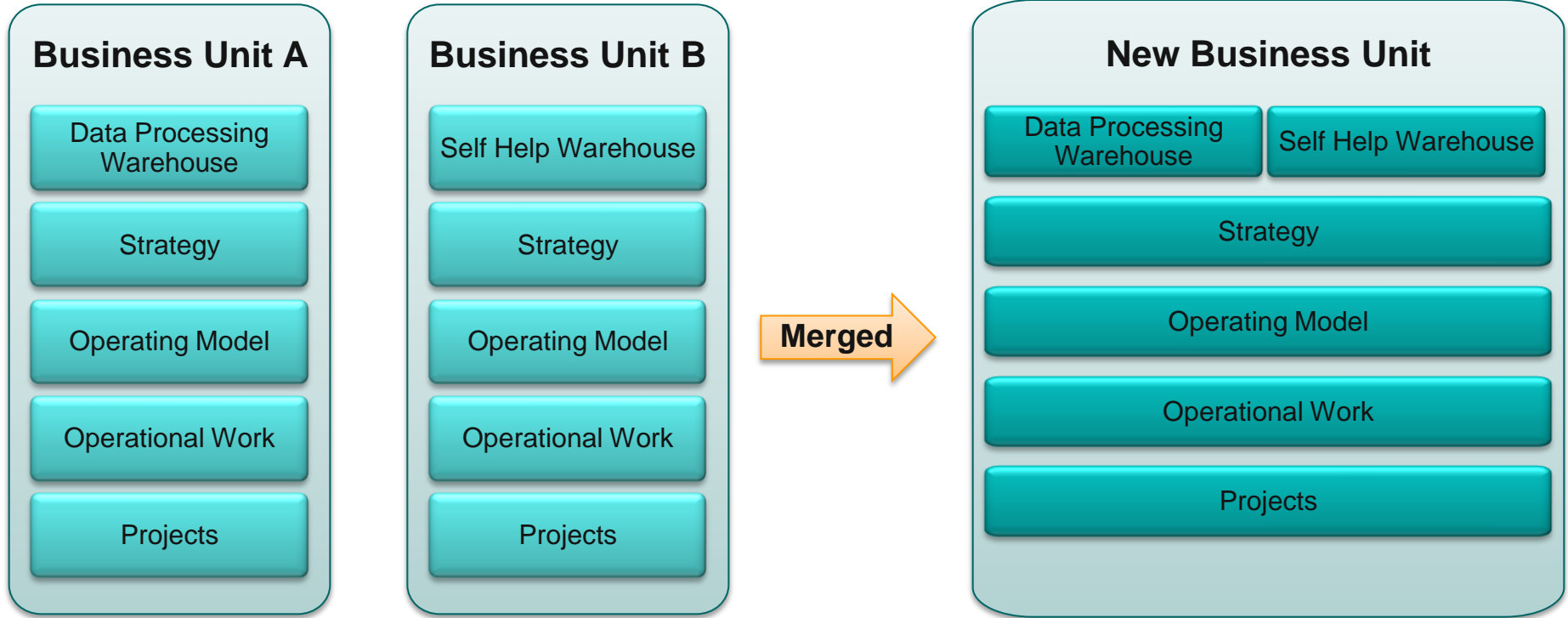
FNB
First National Bank

FNB | Tuesday, 26 February 2013 | Feb 2013 EA forum | Slide No. 1

how can we help you?

- Why a new strategic framework and operating model
- Journey
- Developing and populating the strategic framework
- Developing the operating model framework
- Populating the operating model framework
 - Value chain
 - Team definitions
 - High level processes

Why A New Strategic Framework And Operating Model



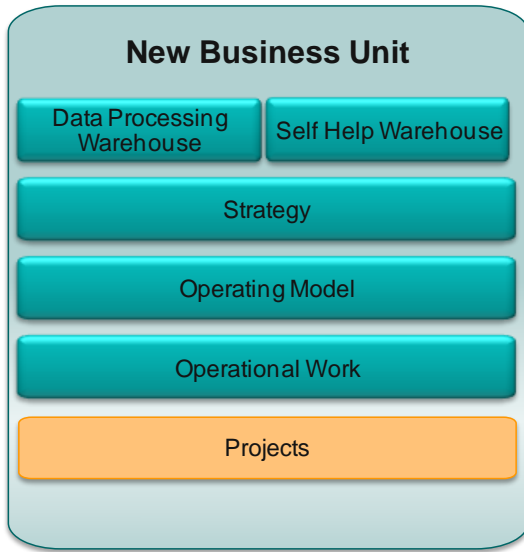
Data Processing Warehouse

- Contains financial data
- Data integrity is checked and enriched
- Strict access control
- Push the data to users in the form of reports and cubes

Self Help Warehouse

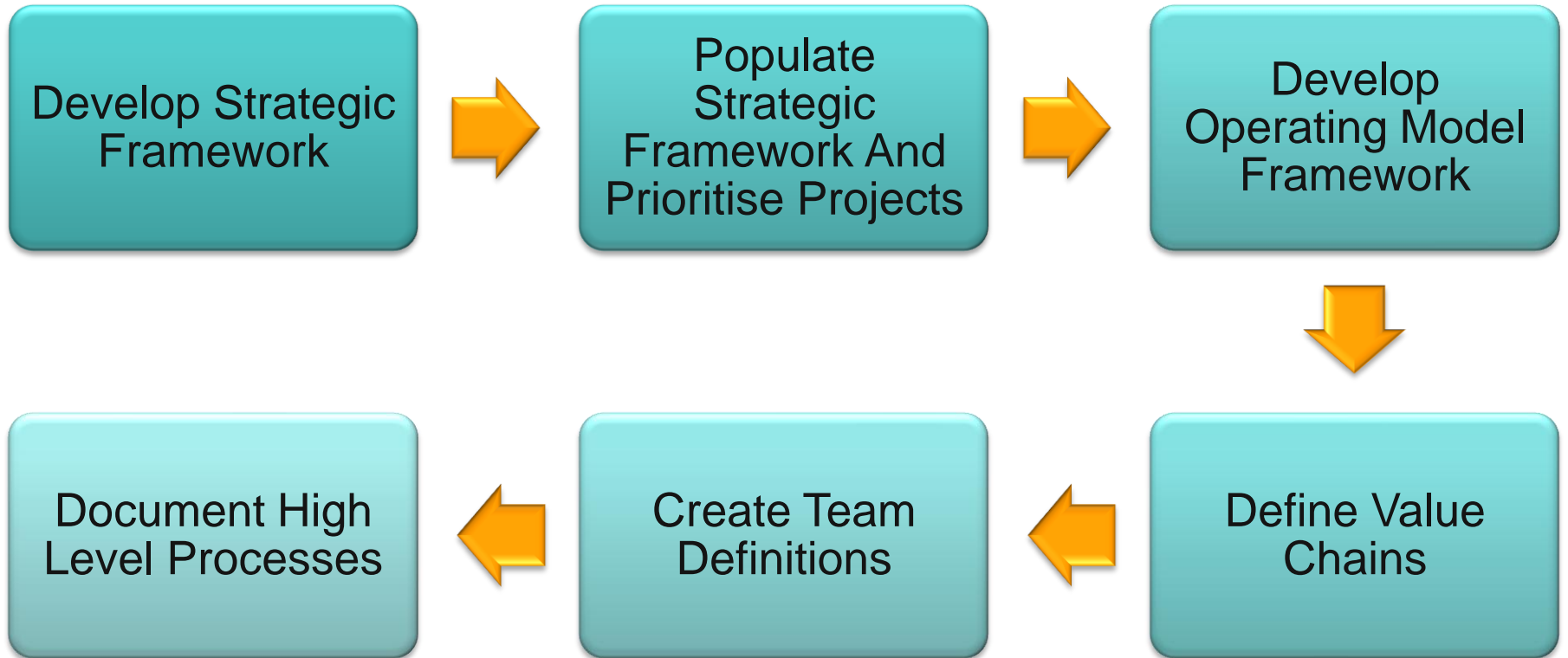
- Contains financial and non-financial data
- Data not integrity checked or enriched
- Access restricted
- Users able to pull data from warehouse and develop their own reports

Why A New Strategic Framework And Operating Model

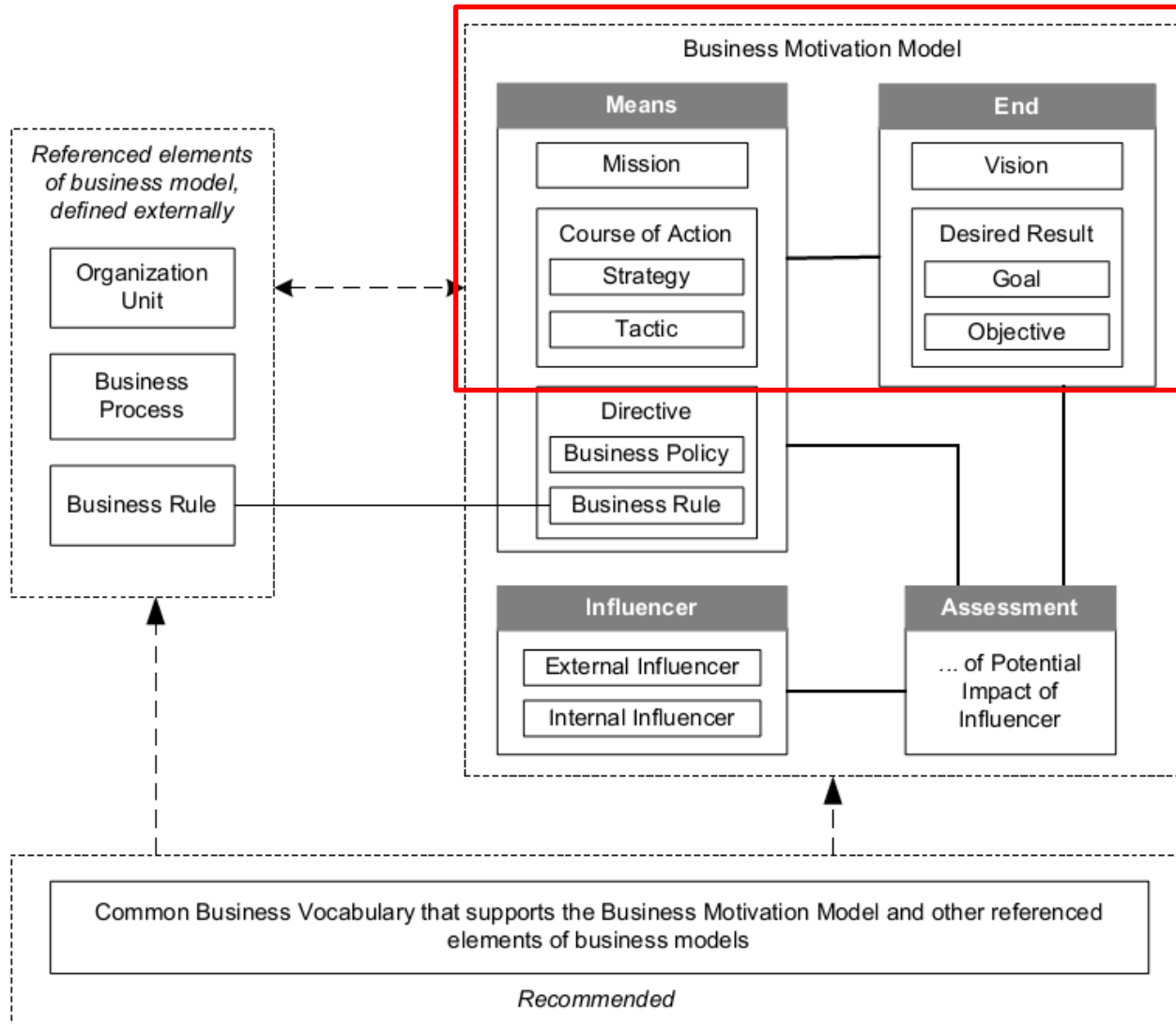


PMO	BS	No.	Initiatives / Focus Areas	Can the initiative be classified as Business As Usual	Which area of Balanced ScoreCard does the Initiative Link to	Is the initiative focusing on Internal or External Areas	What is the relative Priority of the Initiative	Team Priority	90	Is this a priority for the next 90 days	Consequences of not doing it?	180	270	360	Who
1															
2															
24	Tech	Tech	22	Team dynamics need to be established/bedded in (HPT)	iSpace Operating Model	Efficiencies: Deliver concise amalgamation / merger with DWS	X	High		X	Yes				
25	Tech	Tech	23	CA Unicentre groups must change to reflect new structures	iSpace Operating Model	Efficiencies: Deliver concise amalgamation / merger with DWS	X	High		X	Yes				
26	Tech	Tech	24	Technology Manco needs to organise itself into a functioning team with the same objectives(HPT)		People: PPS Results & Skills Development, Enduring, Rewarding Relationships:	X	High		X	Yes				
27	Tech	Tech	25	Define EDW Technical Strategy : Leveraging the IQ site license		Technology: Roadmap for future EDW		X	Med-High			X			
28	SA	SA	26	FSS reporting opportu	no	Innovation / Efficiencies		y	m					^	
29	SA	SA	27	7110 model review	no	Innovation / Efficiencies		y	m			^			
30	SA	SA	28	EPI	no	Innovation / Efficiencies		y	m		^	Yes			
31	SA	SA	29	Charge-off /pay off suspense - centralisation of process	no	Innovation / Efficiencies		y	m				^		
32	Tech	Tech	30	Rationalise BI Toolsets and identify self-help solutions		Technology: Roadmap for future EDW	X	Medium				X			
33	Tech	Tech	31	Define BI Technical Strategy		Technology: Roadmap for future EDW	X	Medium				X			

- Projects had to be re-prioritised to align with the strategy of the new Business Unit



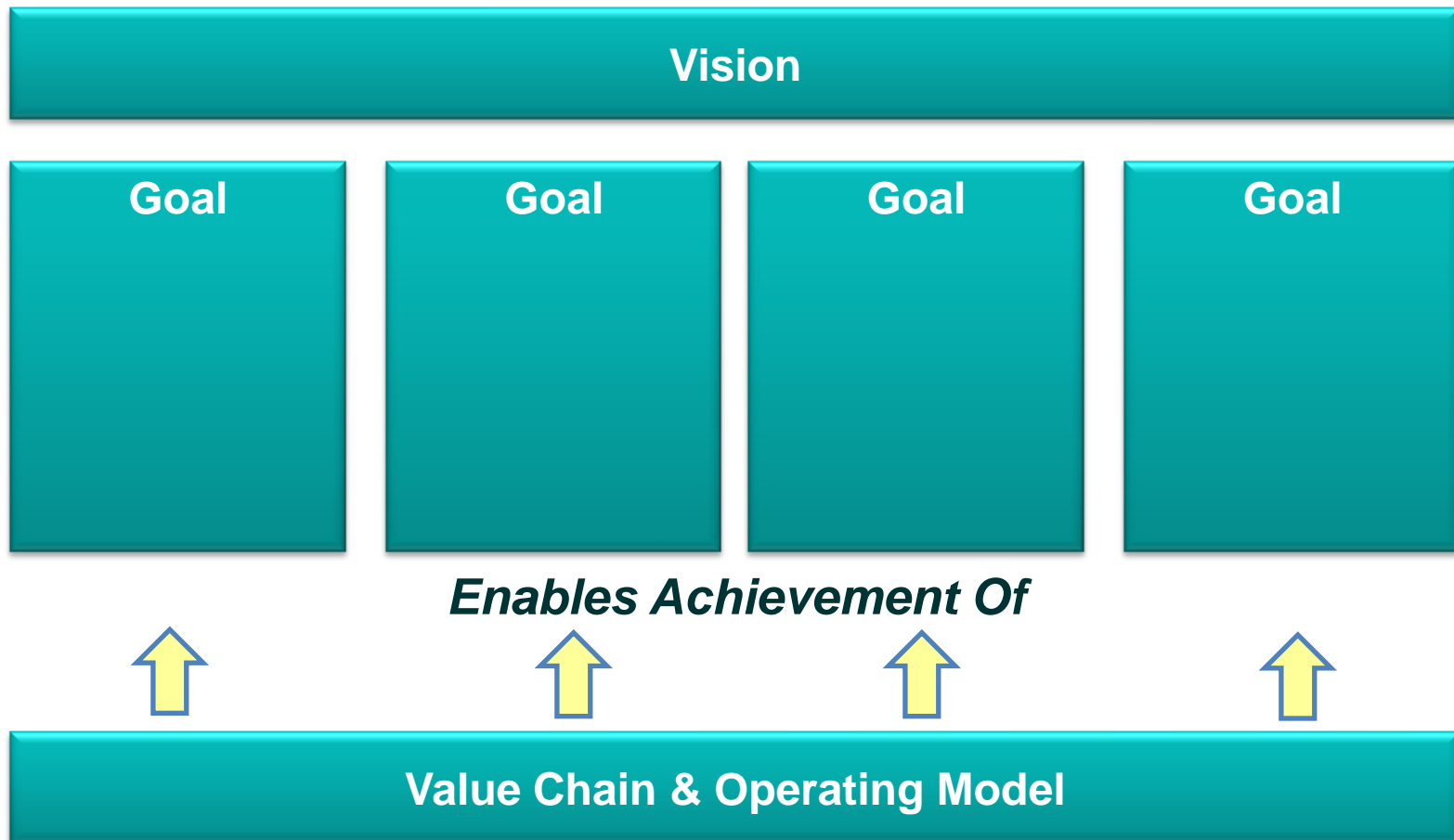
Develop Strategic Framework



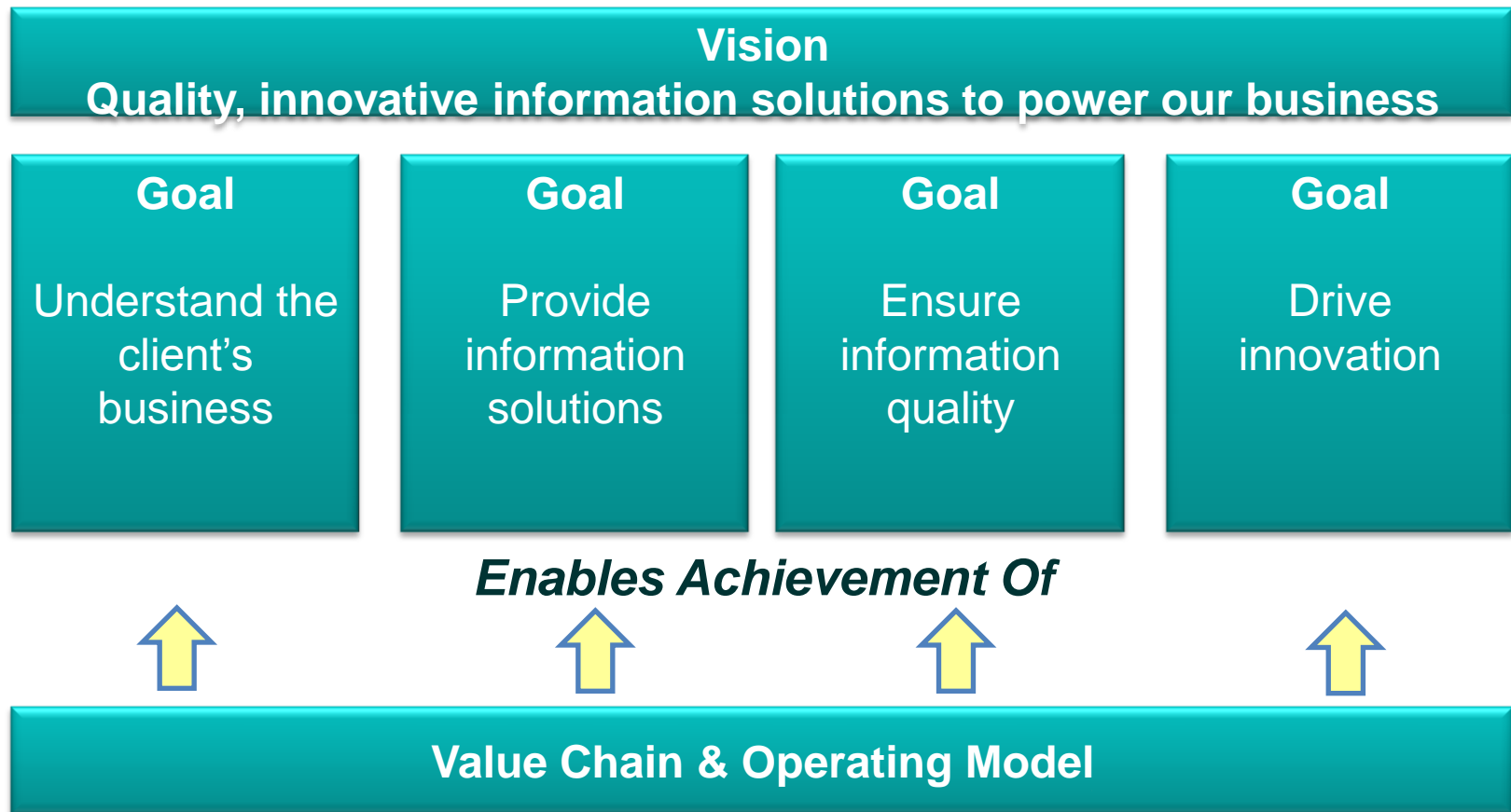
Business Motivation Model asks “why” a certain approach is recommended

What result should be achieved

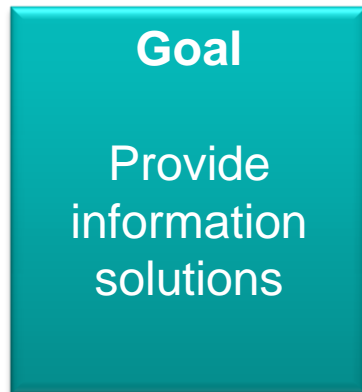
Develop Strategic Framework



Populate Strategic Framework



Populate Strategic Framework

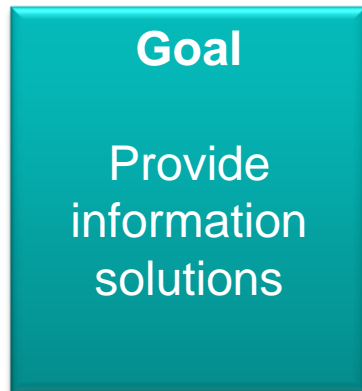


Strategy: Make information available to client in a controlled manner

Strategy: Establish Enterprise Information Management

Strategy: Manage information risk

Prioritise Projects



Strategy: Make information available to client in a controlled manner

Tactic - Identify self-help solutions

Tactic - Create portal strategy

Strategy: Manage information risk

Tactic - Design and implement access and security model

Tactic - Define enterprise data classification model

Populate Strategic Framework

- Sessions were set up with each team individually to take them through the strategy and the thinking behind putting it together
- Each team member received a handout of the vision and goals

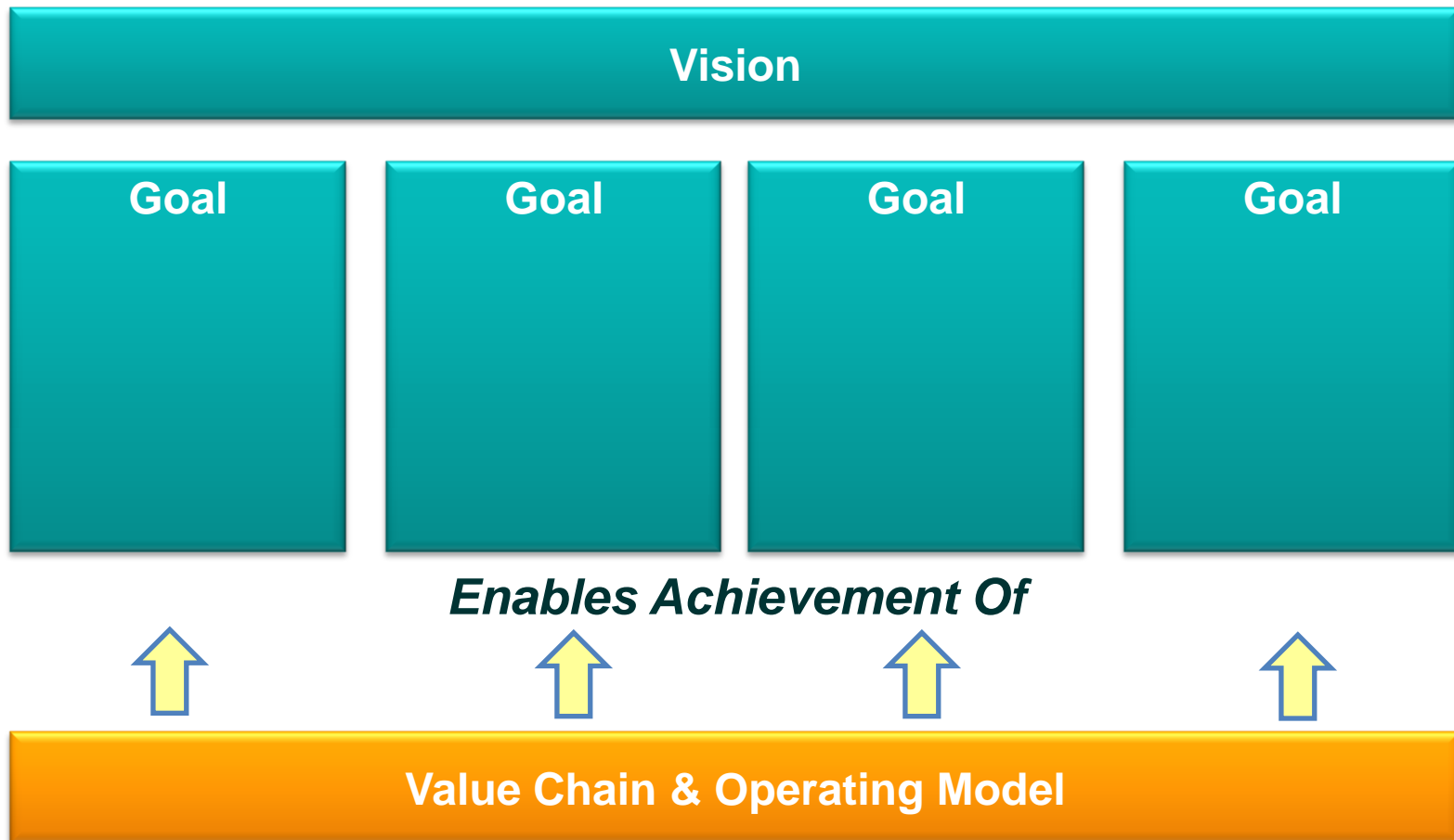
Populate Strategic Framework - Benefits



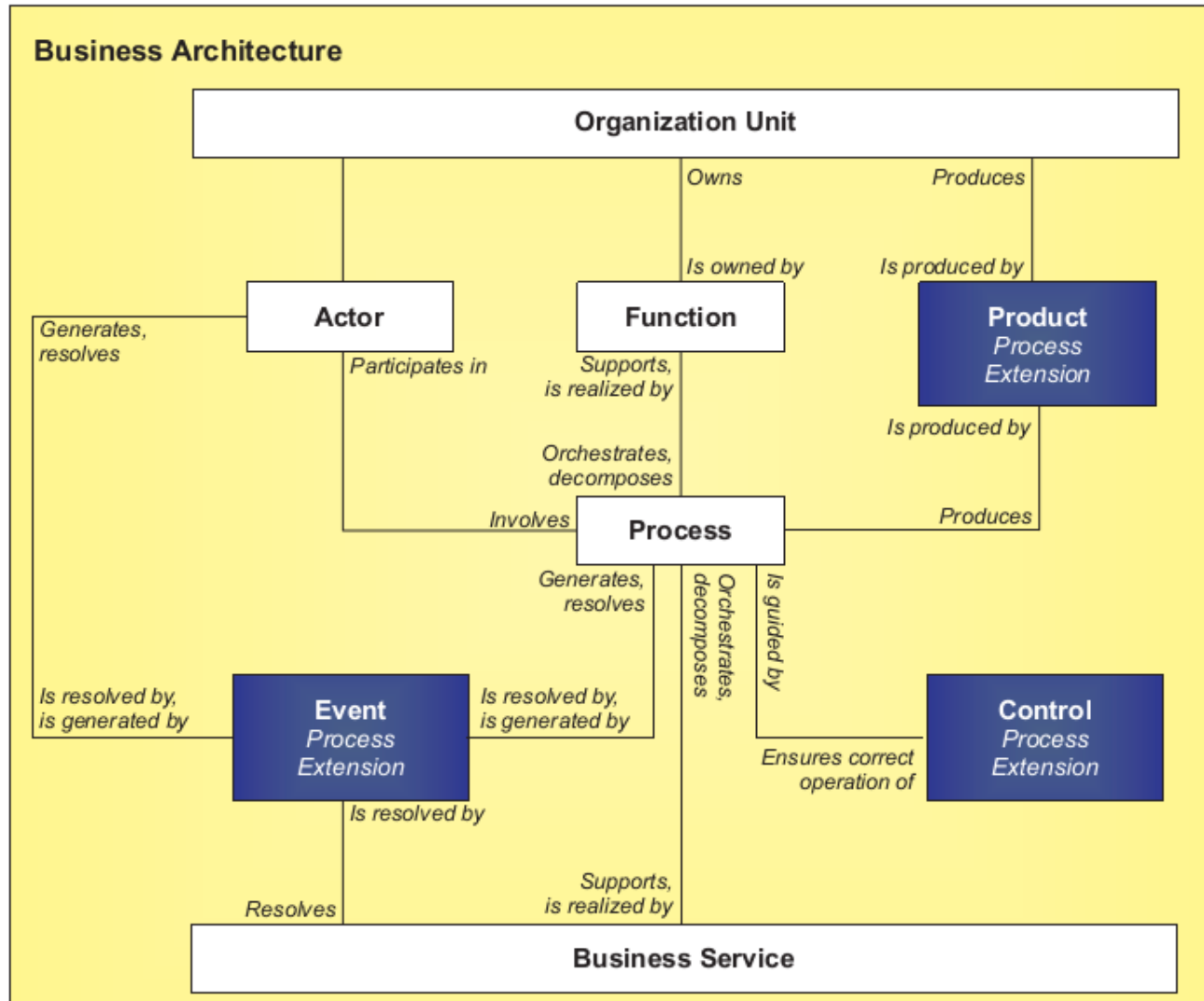
how can we help you?

- ✓ Created a higher level of buy-in and sense of working towards the same goal
- ✓ Each team understood why their part was important to achieve the goals of the business unit
- ✓ Projects aligned with the strategy
- ✓ Projects could be prioritised effectively

Develop Operating Model Framework



Develop Operating Model Framework



Develop Operating Model Framework



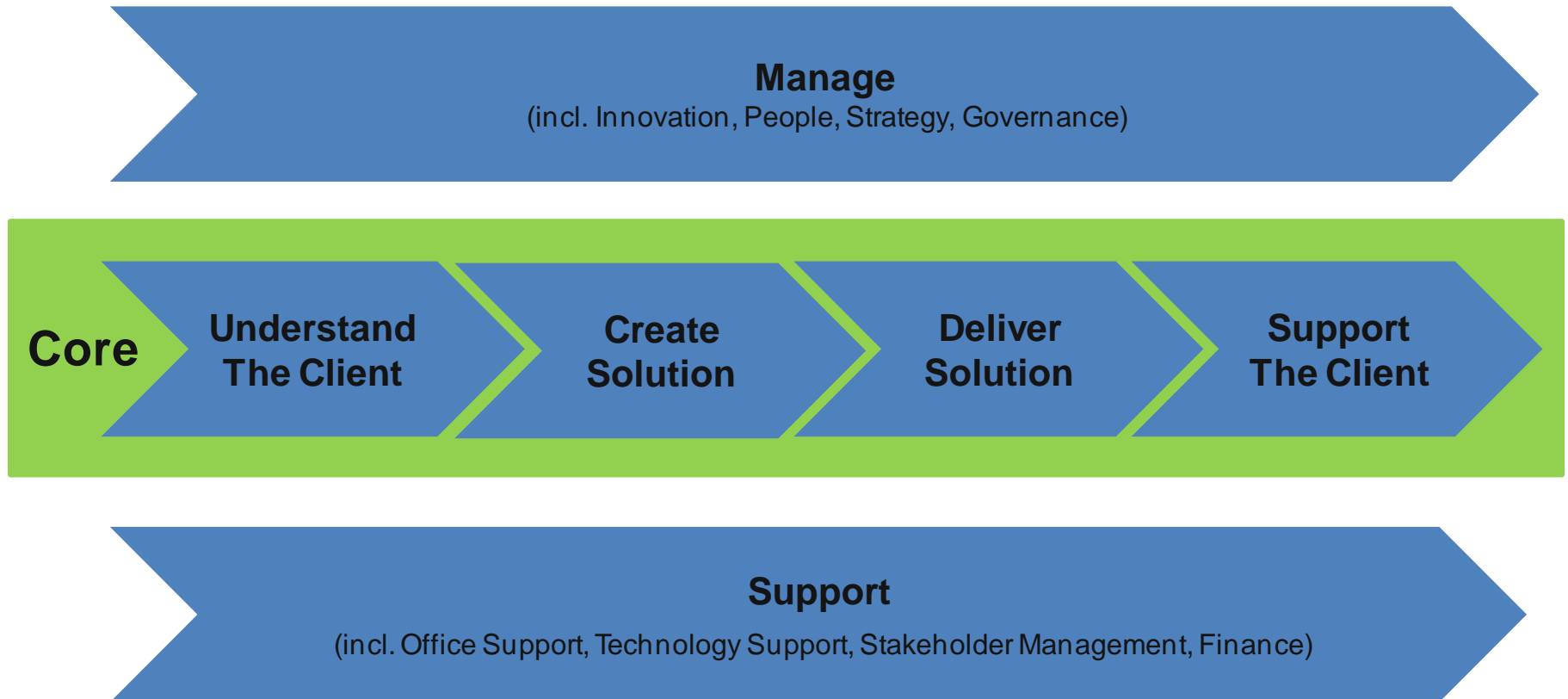
how can we help you?

Value Proposition	Services	Information Solutions
<p><u>Trusted Information</u></p> <p><u>Relevant Information</u></p> <p><u>Timeous Information</u></p> <p><u>Improved Decision Making</u></p> <p><u>Addressing Clients' Needs</u></p> <p><u>Innovative Solutions</u></p>	<p>Align information management to business goals</p> <p>Correct financial transaction exceptions</p> <p>Enable improved decision making</p> <p>Facilitate change management</p> <p>Facilitate integration of information solutions</p> <p>Participate in financial transaction process development</p> <p>Provide automated reconciliation tool</p> <p>Provide reconciliation methodology</p>	<p>Information solutions can be made up of any combination of services</p>

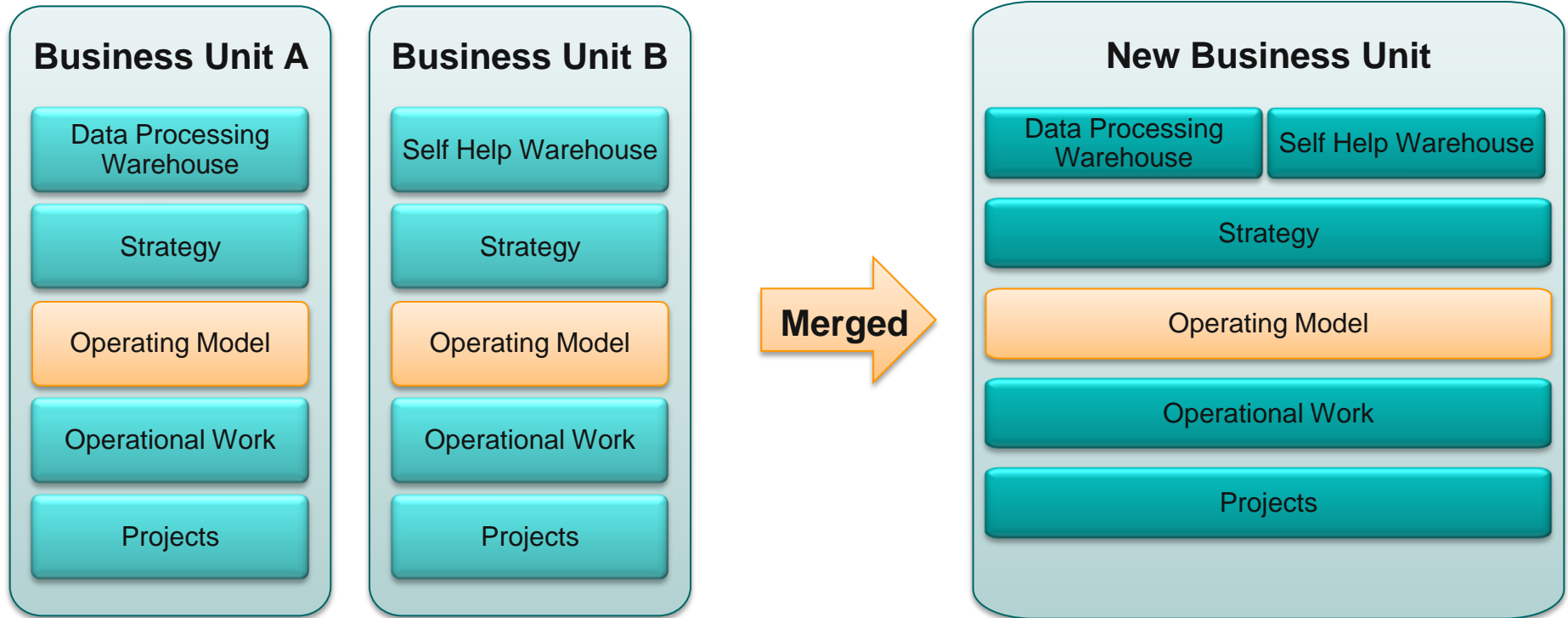
Value Chain



Define Value Chain

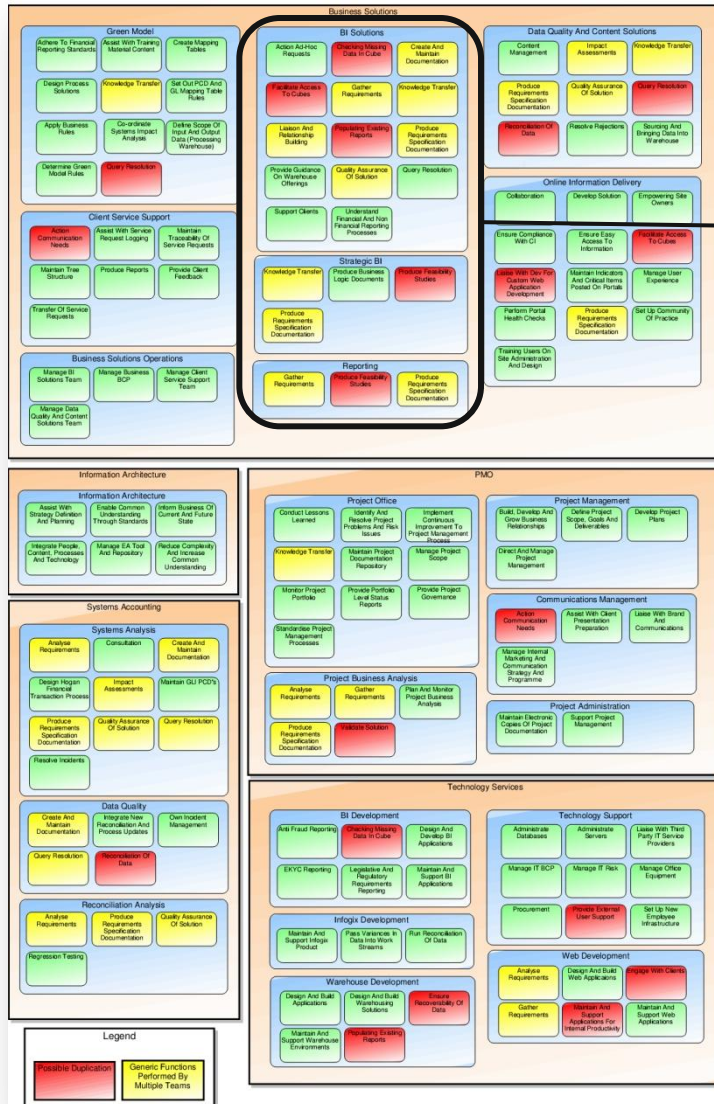


Create Team Definitions



- Are there any duplication between functions of the new teams?
- Are there any gaps?

Create Team Definitions



Green – Unique Functions
Yellow – Generic Functions Performed By Multiple Teams
Red - Duplication

Create Team Definitions

- ✓ Created a one page view of each teams responsibilities
- ✓ Streamline work done by individual teams
- ✓ Define clear responsibilities and boundaries
- ✓ Identified some functions that could be automated to create efficiencies
- ✓ Identified functions that are no longer the responsibility of the new Business Unit

Document High Level Processes

Understand The Client

Identify
Prospective
Clients

Engage With
Business

Analyse
Requirements

Prioritise
Solutions

Create Solution

Plan Solution

Design Solution
(incl. SLA Management)

Develop
Solution

Deliver Solution

Test Solution

Implement
Solution

Manage
Changes

Support The Client

Monitor
Solution
(incl. Benefits
Analysis)

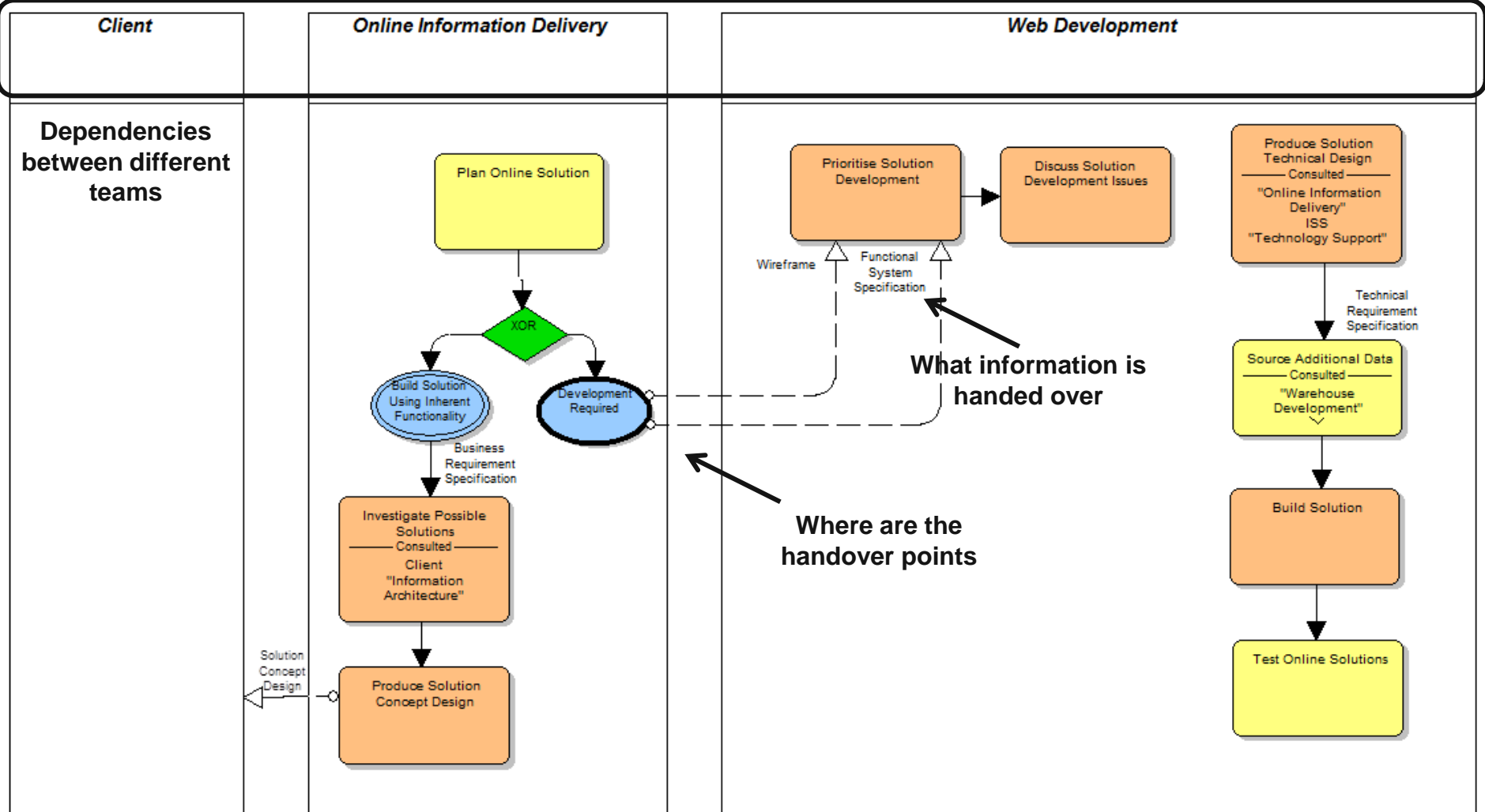
Support
Solution

Train Client

Communicate
To Client

- Created a process rather than departmental view
- Used SDLC as basis

Document High Level Processes



Document High Level Processes

- Defined responsibilities of process owners (across functional areas):
 - Ensure process is fit for purpose and in line with business objectives
 - Create efficiencies
 - Measure process
 - Maintain collaboration between different functional areas
 - Identify potential risks and implement necessary controls
- Identified high risk processes and what controls should be in place

Document High Level Processes

- ✓ How does each team add value to the client
- ✓ What are the dependencies and handover points between the different teams
- ✓ Started to focus more on the process than the different functions – created more collaboration between teams
- ✓ Process ownership prevented another paper exercise
- ✓ Greater awareness of potential risks and required controls

Lessons Learned

- Take everyone on the journey from the start
- Communicate as much as possible, and keep communication as simple as possible
- Translate the information into business terminology instead of overusing architecture jargon
- Collaboration and communication between architects is critical
- Implement change management from the start of the project
- Implement smaller initiatives with quick wins rather than aiming to deliver one big project

- Pushing architecture principles and approaches from the top created resistance
- Had greater success implementing architecture from the bottom up
 - Participating in projects
 - Identifying architecture elements required for specific project
 - Help solve business problems through applying the architecture principles and approaches

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