



# Supporting the Client through a complex IT transformation program

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## **INTRODUCTION OF THE PROGRAM**

### **1 PRELIMINARY PHASE**

- **ARCHITECTURE DESIGN**
- **SYSTEM AND VENDOR SELECTION**

### **2 QUALITY ASSURANCE DURING THE PROGRAM IMPLEMENTATION**




- **PRODUCT QUALITY ASSURANCE**
- **PROGRAM QUALITY ASSURANCE**

### **3 CLIENT SIDE PROFESSIONAL SUPPORT**

- **TESTING**
- **MIGRATION**
- **CUTOVER MANAGEMENT**

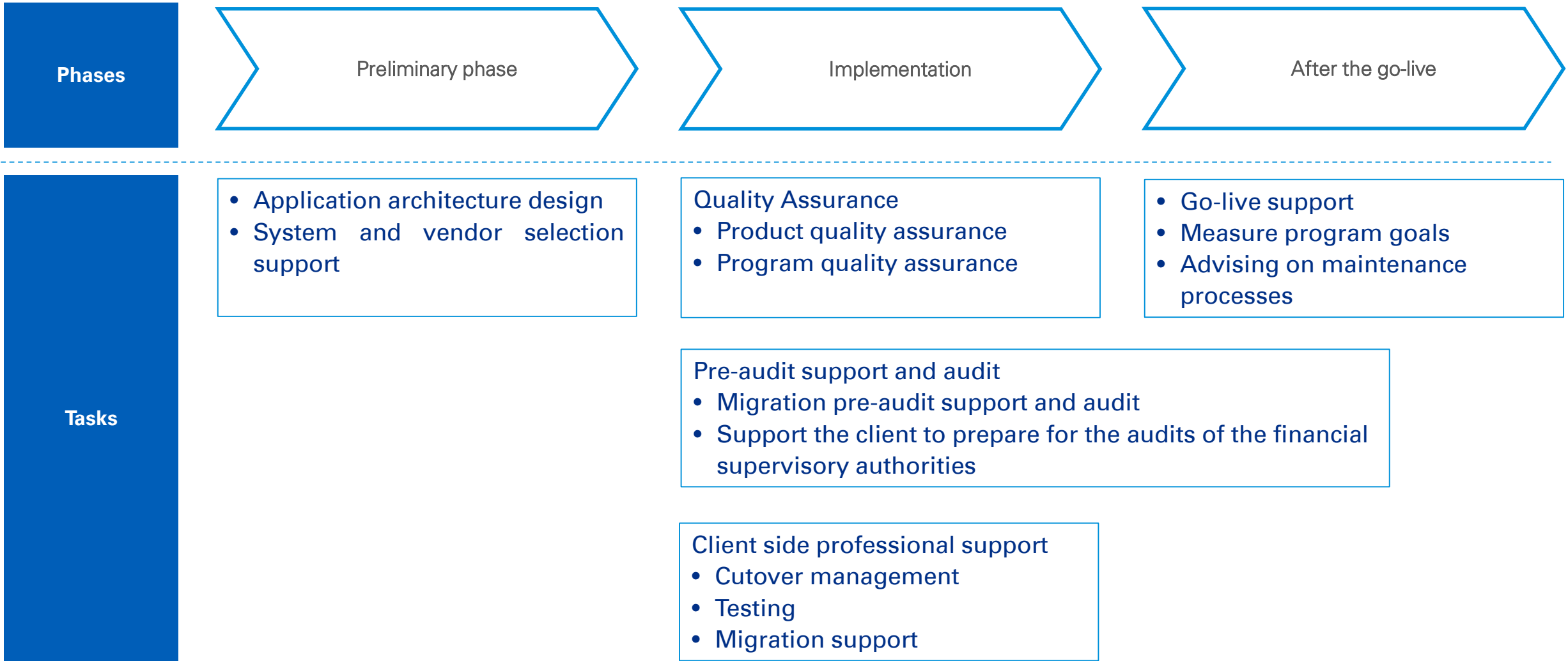
### **4 AFTER GO-LIVE SUPPORT**

### **5 LESSONS LEARNED**

Factors	Description
<p data-bbox="356 357 509 399"><b>Mission</b></p> 	<p data-bbox="917 264 2318 499">Replace the current Core banking system with changing the IT architecture to a state-of-the-art more scalable one, that helps Fundamenta Lakáskassza Zrt. to respond faster to market and business changes, and involves reduced maintenance costs.</p>
<p data-bbox="356 714 509 756"><b>Timeline</b></p> 	<p data-bbox="917 614 1911 656">Original plan was 22 months – very aggressive schedule</p> <p data-bbox="917 749 2280 856">Actual program timeline from requirement definition start to go live is 34 months – still very good compared to similar large-scale programs</p>
<p data-bbox="343 1071 522 1113"><b>Resources</b></p> 	<p data-bbox="917 978 2216 1021">More than 300 professionals involved (contractors and internal resources)</p> <p data-bbox="917 1113 2063 1156">More than 100,000 man days total involving internal and external</p>

**SCOPE**

- Core banking system
- Commissioning system
- Document management system
- CRM system including master data management
- Middleware platform that supports the integration





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## Steps

## Details

### Architecture design

- Analyze current application architecture
- Using financial sector good practices design the future application architecture and integration technology
- Recommending roadmap for the implementation of the new architecture
- Prepare vendor shortlist for the main systems to be implemented

### System and vendor selection support

- Prepare selection strategy
- Recommend invitees for the bidding procedures
- Prepare request for proposals
- Support the client on vendor negotiations
- Evaluate proposals and prepare decision support documents



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Details

Steps

## Product Quality Assurance

- Support the clients in contract negotiations with the IT vendors
- Review of the project charters, design documents, cutover plans, test plans, migration documents, training documents etc. and phrase corrective recommendations
- Preparation of decision support documents (program organization changes, methodology and integration related issues, architecture changes etc.)
- Review complex change request and support the scope management

## Project Quality Assurance

- Review and analyze program and project plans (timeline, dependencies, resources)
- Participation and client support on Steering Committee meetings of the program projects
- Continuous program level risk analysis and recommendation of risk mitigating actions as well as tracking the execution of mitigation action
- One-on-one meetings with the Program management to share thoughts about the day-to-day program operation

## Steps

## Details

**Prepare decision making materials in critical phases of the program that covers**

- Program organization chart, roles and operation
- Integration methodology
- Vendor negotiation strategy
- Architecture related issues

**Manage task forces to support program level redesign**

- Program re-scheduling
- Scope reduction

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## Tasks

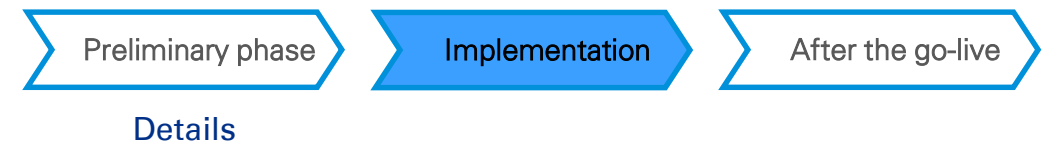
### Professional Supports

#### Test coordinator and tester resources

- Preparation of test plans, test cases and test scenarios
- Test the systems (functional test, integration test, UAT etc.)
- Report errors and follow-up the bug-fixing
- Coordinate the day-to-day work of test teams

#### Cutover manager

- Prepares cutover plans
- Checks the cutover plan with the different business and IT areas
- Manages the cutover process



## Steps

### Migration pre-audit support and audit

- Checking the migration procedure and design control points into it
- Review the migration relates materials (strategy, detailed design, reports etc.)
- Audit the migration process
- Prepare attestation on the migration

### Support the preparation for the regulatory audit

- Review maintenance processes, procedures and documents of the new systems
- Review the authorization and authentication methods of the new systems
- Review the security procedures and tools of the new systems

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Tasks

**Advise on maintenance processes**

**Participate in follow up project planning**

**Support of measuring program goals**

**Support the analysis of the impact of work-around solutions**

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Topic	Details	Advantage
<b>System integrator role</b>	 <p><b>Fundamenta fulfilled the system integrator role</b> with the help of some external subject matter experts (architect, cutover manager etc.). This model worked well but huge amount of internal resource (man days) had to be invested.</p>	<p>Significant amount of internal knowledge built up during the program</p>
<b>Continuous review</b>	 <p><b>Scope has to be continuously reviewed</b> and scope reduction is needed if the risk of not meeting the deadline is increasing</p>	<p>The program could be finished in less than 3 years</p>
<b>Program management</b>	 <p><b>Strong program management involving C level</b> officers</p>	<p>Dedication and control during the program and the possibility of changing methods rapidly if needed</p>
<b>Testing</b>	 <p>Flexible testing methods and <b>very intensive and long client-side testing</b></p>	<p>Buy-in along the whole organization</p>
<b>Migration</b>	 <p><b>Strong focus on migration</b>, monthly full migration in the last 8 months</p>	<p>Migration procedure has been very well built and good quality data from day 1</p>
<b>Trial period</b>	 <p><b>Intensive 2 days system trial periods:</b> simulation of the live operation with hundreds of users involving all business areas</p>	<p>Buy-in along the whole organization, practicing opportunity for the users and preparation for the live maintenance processes</p>