Supporting the Client through a complex IT transformation program

KPMG Tanácsadó Kft.
Kórász Tamás
Partner, IT Advisory

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IT future and efficiency program

Mission

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,
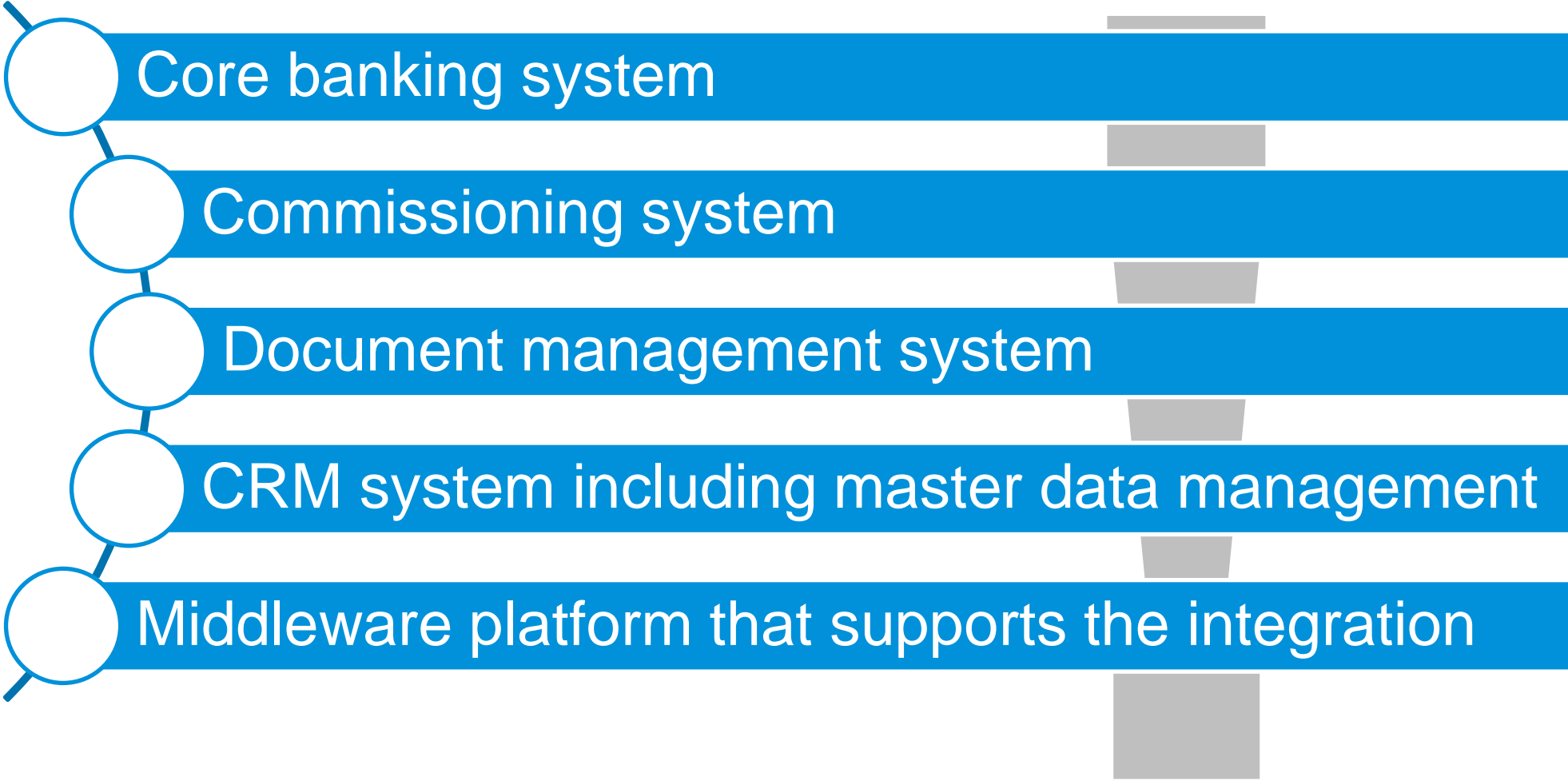- and involves reduced maintenance costs.

Timeline

- Original plan was 22 months – very aggressive schedule
- Actual program timeline from requirement definition start to go live is 34 months – still very good compared to similar large-scale programs

Resources

- More than 300 professionals involved (contractors and internal resources)
- More than 100,000 mandays total involving internal and external
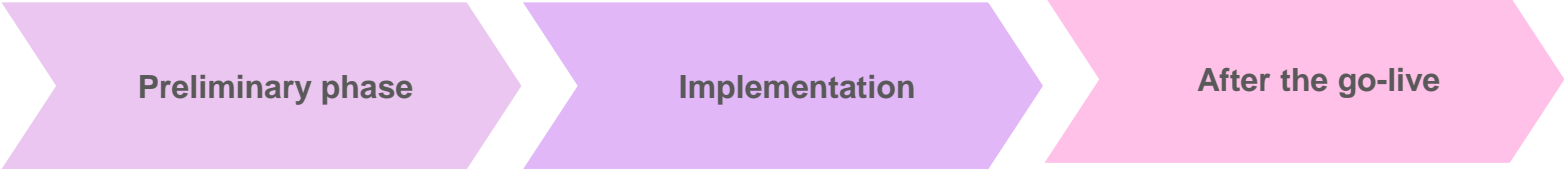- 25 million EUR spent – on budget!

Scope of the IT future and effectiveness program

SCOPE

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

Areas of support

Phases	Preliminary phase	Implementation	After the go-live

Tasks

- Application architecture design
- System and vendor selection support

Quality Assurance
- Product quality assurance
- Program quality assurance

- Go-live support
- Measure program goals
- Advising on maintenance processes

Pre-audit support and audit
- Migration pre-audit support and audit
- Support the client to prepare for the audits of the financial supervisory authorities

Client side professional support
- Cutover management
- Testing
- Migration support

Preliminary phase

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

Implementation phase: Quality assurance

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

Implementation phase: client side professional support

Cutover manager

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

Test coordinatior and tester resources

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

Implementation phase: pre-audit support and audit

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

Support in critical situations

- 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

After the go-live

- Advise on maintenance processes
- Support of measuring program goals
- Support the analysis of the impact of work-around solutions
- Participate in follow up project planning