

Advisory Group AG

Success Stories (Excerpts)

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Our Team – Our Awards

Advisory Group
Management Consulting



Advisory Group AG
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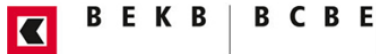


Our Company References – Corporations which like to work with us

Advisory Group
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PIMCO



Success Story 1: Establishment of a centralized organizational-management process for a Swiss cantonal bank



SITUATION

The growth of its existing branch network and the scheduled expansions over the next years challenged a big Swiss Cantonal Bank to create efficient and standardized processes for the administration and change of its implementation and development organization. The optimization projects focus was on the topics of Go-To-Market, process efficiency, risk- and personnel management processes.

CENTRAL PROBLEM

The challenge of the growing respectively the empirically grown branch network was in the restructuring of the existing structure- and competence-management processes of the bank. Personnel of the same rank had to have the same clearance and access rights across all the branches. Additionally, it was necessary for the bank to open or close a branch and adjust the existing organizational structure within a few days, via a central authority within the bank.

OUR ROLE & MANDATE

Our team of one consultant: business case creation, project management

APPROACH

- Analysis/restructuring of the capsized organizational project and project re-planning
- Prepared to-be process map for the management of the implementation organization
- Project mobilization and project management (CHF 2.5 Mio, 8 months)

RESULTS

- Standardization of the bank's core organizational-processes in one central authority/process
- Piloted an organizational management tool in cooperation with SAP
- Reduced Go-To-Market time and costs for the opening/closing of (new) branches

Success Story 2: Turnaround management of a reporting & output management program for a Swiss cantonal bank



SITUATION

A bank initialized a bank-wide reporting and output renewal program with the goal to revise the bank's reporting (customer and non-customer reporting) and to renew the output management processes, sequences and tools. Next to renewals (personalization of customer reports) the program included a cost reduction goal for the bank's printing and mailing centres. Costs per document were to be reduced significantly.

CENTRAL PROBLEM

The broadly based reporting and output management program started with a rapid-prototyping-process. As a result essential project management structures, processes and elements were either insufficiently or not at all implemented before the start of the project. Consequently, the program developed its own momentum, which led to the inclusion of over 50 internal and external specialists into the project. This resulted in mounting complexities, delayed delivery, increasing project costs, dissatisfied customers and stakeholders as well as a loss of orientation within the project management.

OUR ROLE & MANDATE

Our team of 1: program assessment, interim management, project management of the overall project

APPROACH

- Analysis/restructuring of the project
- Personnel and interim management
- Creation of a to-be concept for the output management processes and possible cost reductions
- Program re-start and management of the overall project (CHF 14.2 Mio, 8 months)

RESULTS

- Reduction of the out-of-hand costs – investment protection
- Successful implementation of the should-be concept for the bank wide output management processes and tools
- Prepared the necessary conditions for future cost reductions within the output management

Success Story 3: De-merger of a Swiss cantonal banks shared banking-service center



SITUATION

The termination of business activities by a majority of the stakeholder banks of a Swiss shared services centre provided the involved banks (leaving/remaining) with a serious challenge. The central question was how to de-merge the business operations/IT platforms for the remaining and leaving banks without exposing the individual banks to an operational risk that could damage their daily operations, and therefore their reputation.

CENTRAL PROBLEM

The challenges lay in the separation of the highly integrated and collectively optimized processes of the individual banks within the shared banking-service center. Next to the mutually used corebanking solution the individualities (applications & processes) had, within 8 months, also to be separated along the following dimensions: clearing processes, responsibilities, ongoing/shared core projects, budgets, operations, legal aspects, and the warranty of the governance per bank in accordance with the banking supervision (FINMA).

OUR ROLE & MANDATE

Our team of two: De-Merger concept per bank/FINMA, project planning and project management

APPROACH

- Prepared a FINMA compliant de-merger concept including an implementation and financing plan per involved bank
- Prepared post de-merger vision
- Project-setup, mobilization and management of the overall project within the parameters of the business case (CHF 8 Mio/25 Mio, 8 months)

RESULTS

- De-merger agreement, including funding agreement between the involved banks and FINMA approval
- Successful execution of de-merger project for all involved parties within the allocated timeframe, and budget
- Ensured future business operations for the remaining banks

Success Story 4: Analysis and re-launch of a bank wide CRM approach for a Swiss private bank



SITUATION

The global growth and the subsequent decline in profits in several regions challenged a large Swiss private bank to organize its customer-oriented advisory-, service- and sales-processes more efficiently and effectively. Advisory processes needed to be more transparent, comparable and of a higher quality, while at the same time run in a systematic fashion. The customer was to be in the center of the new advisory process, which aimed to analyse and offer the customer the next-best-product (NBP).

CENTRAL PROBLEM

The bank had previously started three independent CRM projects, partly with renowned consultancies, but had terminated them because of the lack of quantifiable benefit. Within the heterogeneous processes and banking solutions in the different regions the previous CRM projects failed to quantify a benefit over an economically relevant timeframe. The Advisory Group was tasked to take an expert role in the set-up of a CRM project. This included the creation of a business case and the selection of the project staff and templates.

OUR ROLE & MANDATE

Our team of one: Business Case creation, project-coaching, subject matter expert/coaching

APPROACH

- Analysis/consulting of how to best set-up the project within the bank
- Introduction of project methodologies and templates to successfully master the CRM topic
- Examination of possible business cases divided in short-, medium-, and long-term effects

RESULTS

- Established a common base between the direction of the CRM, the bank's project goals and the project team
- Introduced effective tools and templates for the successful start of the CRM project (by then in its 4th attempt)
- Prepared the necessary project proposal

Success Story 5: Reduction of business contingency risks (host-replacement) for a Swiss cantonal bank



SITUATION

As of the departure of stakeholder banks from a Swiss shared services center the remaining banks faced growing business contingency risks in several areas: increasing maintenance and operating costs for the core banking system, lack of know-how about the existing and out-of-date banking solution, end-of-life complexities, increasing integration costs, problems in the implementation of future banking requirements and zero growth in new customers.

CENTRAL PROBLEM

The challenges for the shared services center lay not only in the increasing difficulties in operating and servicing the host-environment of the core banking system but also the evolutionary approach, the increasing complexity in development and the increasing gaps in the skills and knowledge of the project and program management. The Advisory Group was tasked to examine, plan and successfully implement a transformation program (HAL = host-replacement) to reach the defined goals by 2010.

OUR ROLE & MANDATE

Our team of two: program management, PMO, quality control, budgeting and stakeholder management

APPROACH

- Business contingency analysis and deduction of action plan
- HAL-Business case examination and calculation
- Program setup, mobilization and management of the overall project within the guidelines of the business case (CHF 35 Mio, 18 months)

RESULTS

- Successful initialization and implementation of the HAL-program within the planned budget, time and quality
- Prevented business contingency damages for the remaining banks
- Created the precondition for the continued use of the banking solution (BPO call for proposals)

Success Story 6: Evaluation of a new payment solution for a network of Swiss cantonal bank



SITUATION

A matured and mostly individually developed payment solution (Host based) was to be replaced by a more modern and cost-efficient payment solution (Swiss and non-Swiss payments). The existing payment solution was highly specialized, stabilized and continually developed to process the volume of daily transactions for 71 banks.

CENTRAL PROBLEM

The reduction of the client base to only a few remaining banks led to a massive increase in total costs of ownership. Additionally, the business contingency risks for the existing payment solution (proprietary and host-based) spiralled as of increasing knowledge gaps (technical/banking requirements). Therefore, the further development (to include new regulatory and technical requirements) and maintenance of the payment solution was limited. Changes could not be realised in an efficient manner. The goal of the project was to first evaluate and then to select a modern and competitive payments solution.

OUR ROLE & MANDATE

Our team of 2: Project management, financial control and business analysis support

APPROACH

- Analysis and prioritization requirements regarding the payment solution
- Project planning based on payments business case
- Design of future solution. Selection of solution provider and integration partners
- Project-setup/-management within the budget (CHF 15 Mio, 15 months)

RESULTS

- Successfully implemented the project goals within the defined quality and budget parameters
- Prepared plan to reduce the future transaction- and maintenance costs
- Prepared the conditions for a simplified implementation of new requirements

Success Story 7: Renewal of a CRM & the customer oriented front-office-operations for a union of Swiss cantonal banks



SITUATION

Future demands on a bank's business necessitated that existing banking processes had to be enhanced and optimized. It became obvious that neither the individually developed and proprietary integrated CRM nor the customer centric front office solution (host based) was able to support the existing and future business demands in an optimal or economic manner, without major investments and modifications.

CENTRAL PROBLEM

Due to a bank's realignment the connected CRM and customer centric front-office processes and operations had to be optimized and adapted. Additionally, the process costs and the total-costs-of-ownership (TCO) of the supporting CRM and customer oriented front-office-solution had to be reduced significantly. An increase in the flexibility and robustness of the new solution to cover the new demand was central to the project. A new front-office emergency solution was to improve availability and reliability of the banks cashier service in over 600 branches.

OUR ROLE & MANDATE

Our team of two: Project management, QS-management and business analysis support

APPROACH

- Analysis and prioritization of the CRM & front – office requirements and calculation of the CRM & FO business case
- Analysis, design and implementation of the process improvement of the new banking solution
- Project setup and management within calculated parameters (CHF 3.8 Mio, 15 months)

RESULTS

- Realization of the aimed at process improvements
- Cost reduction (TCO) through the introduction of a modern and innovative CRM & front-office banking solution
- Realization of the defined parameters to achieve an efficient maintenance in the future

Success Story 8: Renewal of the existing ATM banking for a union of Swiss cantonal banks



SITUATION

Current and future customer demands, monitoring processes in the area of card transaction processing, debit- and credit card management and a banks own services at the ATMs had to be assessed, revised and automated. The existing, grown over the years and poorly documented credit- and debit card solution was not state of the art in regards to technology and IT-architecture.

CENTRAL PROBLEM

A transformation project was initiated as the used credit- and debit card solution including the ATM solution was not manageable anymore, therefore, making the implementation of new requirements ever more complicated. The reasons were technical (end of life, not support of provider anymore) on the one hand and economical (not scalable) on the other hand. The project goal was to realize the pent-up process improvements, to consolidate and to standardize the current processes and to conceptualize and to implement a cost-efficient and modern ATM solution (host-free, multitenancy).

OUR ROLE & MANDATE

Our team of two: Interim-management, coaching of project manager, quality control and assessment of solution

APPROACH

- Analysis and prioritization of ATM requirements
- Definition of business case and ATM project planning
- Design of future solution, selection of solution provider and integration partner
- Project-setup and management within the calculated framework (CHF 4.5 Mio, 12 months)

RESULTS

- Successful implementation of defined project goals within the planned budget and the desired quality
- Realization of the planned process improvements and standardizations
- Achieved the pre-conditions for a future efficient maintenance

Success Story 9: Creation of a model to control BC/simulation over the next 10 years for a Swiss cantonal bank



SITUATION

An existing outsourcing agreement was founded in a 10 year business case. Two years after the implementation of the outsourcing fundamental parameters had changed (go-to-market model, compliance rules, implementation of ongoing projects, transformation, breakdown in volume). Consequently, the parameters on which the current business case rested kept changing. Therefore, reliability in planning financial matters was not given anymore.

CENTRAL PROBLEM

Due to the altered underlying conditions it became necessary to transfer the existing business case into a new model, while taking into considerations all known and unknown changes (for example operational and projects risks). The altered underlying conditions were to be integrated into the new model to the best possible extend with the goal to prepare a detailed planning basis. As individual costs pools were dependent on future developments the relevant influences and necessary actions had to be identified and mapped out.

OUR ROLE & MANDATE

Our team of one: Preparation of business case and support of business analysis

APPROACH

- Analyzed all existing parameters of the business case for alterations
- Prepared new enhanced business case which presented the new facts/parameters in a best/worst-case scenario
- Mapped the relevant influences on the costs pools (scenarios)

RESULTS

- Establishment of the adjusted business case
- Raised stakeholders awareness of the influence factors. Established processes to control the influence factors
- Ensured compliance with the adjusted business case

Success Story 10: Sourcing for a Swiss cantonal bank/shared computing center



SITUATION

The customer had outsourced the IT of a shared computing center, of which he owned a significant stake, to an international IT-service provider in 2010. At the start of the outsourcing process the basic conditions for cooperation were defined in a governance structure. Two years after the beginning of the cooperation a set of issues had piled up that needed to be resolved. Primarily these issues were not sufficiently defined in the framework contract.

CENTRAL PROBLEM

During the course of the cooperation some issues had never been resolved. Over time these issues piled up which did hindered a pragmatic solution. Primarily the task was to settle and define financial responsibilities under changed conditions, which were not priorly defined in the framework contract. A new proposal for a solution was to be provided, while also taking the existing contracts into consideration.

OUR ROLE & MANDATE

Our team of one: Business analysis, contract management, contract negotiation

APPROACH

- Systematic collection of the unresolved financial issues. Structuring of issues into relevant thematic blocks
- Evaluation of legal opportunities based on the existing contractual framework
- Collected issues together with the outsourcer
- Negotiation on client's behalf

RESULTS

- Settled the unresolved financial issues
- Additional costs were borne by the outsourcer (no additional costs for client)
- Sensitized the client and outsourcer to the unresolved issues, which was needed to start the necessary organizational and process changes

Success Story 11: Steering/Management of 3rd party contracts for an international IT-service provider



SITUATION

An existing computing center for retail banks was taken over by an international IT-service provider in an outsourcing agreement. With the takeover around 800 contracts were transferred into the responsibility of the IT-service provider. Within a short time frame the existing processes of the IT-service provider proved to insufficient to handle the volume.

CENTRAL PROBLEM

The amount of 3rd party contracts together with the linkage to the services made the transfer to the IT-service provider more complicated than initially expected. New models of how to manage the existing contracts now and in the future had to be developed. In addition, the contract between the customer and the IT-service provider stipulated a new reporting approach regarding 3rd party contracts. The Advisory Group was tasked to consult in the development of such a model.

OUR ROLE & MANDATE

Our team of one: Creation of business case (ongoing prognosis/forecast), subject matter expert

APPROACH

- Developed model for the prognosis and settlement of the current and future 3rd party contracts
- Customer coordination; Prepared a new forecast for 2012
- Account size of 3rd Party contracts (CHF 25 Mio p.a., decreasing)

RESULTS

- Established a model for the prognosis and settlement of the current and future 3rd party contracts
- Prepared the foundation for decision making to manage the priorities, which also considered the biggest cost reduction potentials

Success Story 12: Software asset management; Optimization (Microsoft & Oracle) for a shared computing center

Advisory Group
Management Consulting



SITUATION

The takeover of a shared computing center by an international IT-service provider lead to a totally different status quo for the existing software suppliers. The existing contracts (models, terms) were not laid out for the new status quo. Legally relevant demands were made by the software suppliers (combined with massive additional costs) to settle the situation.

CENTRAL PROBLEM

The challenge of the project was in fulfilling the software suppliers licence requirements (in particular in the context of a shared computing center) while at the same time optimizing the costs. As of the special context of a shared computing center (cost center, non-profit organisation/conditions, relationships between the customers) licencing requirements had been negotiated on a case to case basis. These interests had to be transferred into a new solution. The situation meanwhile was used by the suppliers to execute a software audit regarding the correct licencing.

OUR ROLE & MANDATE

Our team of one: Analysis of licensing models, supervision of audits, negotiations (SW suppliers & outsourcer)

APPROACH

- Analysis of existing software contracts and licensing models
- Negotiations with SW suppliers and outsourcer regarding the model and the compliance to the license requirements
- Contract negotiations between SW supplier and outsourcer (Contract size CHF 4 Mio p.a.)

RESULTS

- Oracle: new licensing agreement; optimization of new licenses without any additional costs; massive cost reduction after the fourth year
- Microsoft: Transferred existing licenses to the client (from previous shared computing center to bank); reduced pricing for next 3 years; significant cost reductions through reduction of existing licenses

Success Story 13: Assessment of an existing securities-renewal program



SITUATION

The renewal and functional enhancement of an existing trading- and securities environment and platform was initiated through a companywide transformation program. Due to project delays and increasing costs the bank, as the client, asked for a 360 degree project assessment. The goal was to identify the underlying root causes, to localize dependencies to simultaneously ongoing projects and so to review costs and budgets.

CENTRAL PROBLEM

The challenge was in the size and complexity of the securities-renewal program, which had grown since its initiation. New banking and IT requirements were added to the project over time because of insufficient business analysis. Problems with the integration into the existing environment and faulty standard software components led to an increase in costs and complexities. Additionally, delivery dates had to be met to not cause delays in connected projects.

OUR ROLE & MANDATE

Our team of one: Analysis, supervision of audits, suppliers analysis, re-planning and budgeting

APPROACH

- Analysis of the existing project plan, the risks and the critical success factors
- Verification of the current budget and the usage of funds
- Preparation of realistic project plan & budget; calculation of the probability to meet goals in time
- Project re-planning and re-structuring

RESULTS

- Enabled the needed transparency and prepared a situation analysis for the management
- Prepared a realistic foundation for decision making regarding the re-planning of the project
- Set realistic target dates
- Realized cost-reductions

Success Story 14: Analysis and conception of a medium-term plan for the front-office/CRM team of a international private



SITUATION

The increasing front-office costs and the declining margins/sales of an international private bank led the responsible CEO to the conclusion that a revision of the existing target figures for the sales department was necessary. The existing planning gaps were to be closed through new processes within the sales management unit and with an integrated medium-term plan for the existing CRM teams. A stronger link between reaching goals and receiving a bonus was to be established.

CENTRAL PROBLEM

Within the private bank the sales plans per customer segment were not binding and not documented in a adequate manner. The creation and processing of customer business plans was not uniformly regulated across all teams. Measurable target goals per team or CRM were not binding enough and lacked transparency. The current situation was aggravated by the takeover of the private bank by an international bank, which demanded defined and clear management reporting for the current and future sales KPIs and performance goals.

OUR ROLE & MANDATE

Our team of one: Audit of the current planning processes, design & implementation of a sales management

APPROACH

- Analysis of the current customer business plans per CRM, team and region
- Standardization and enhancement of existing plans and KPIs
- Introduced standardized sales process
- Anchored the sales process/specifications in SAP

RESULTS

- Standardization and documentation of the existing customer business plans (account-plan)
- Definition of new management indicators per sales team and region
- Introduced a medium-term plan in the internal SAP
- Defined new KPIs for management reports to measure sales progress

Success Story 15: Analysis & design of a CRM solution for a private bank in the context of its Avaloq environment



SITUATION

Due to the introduction of a new standard-banking solution (Avaloq) a Swiss private bank decided to develop and implement a companywide CRM concept. The goal of the concept was to allow the bank to care for their customers and customer segments more efficiently. Not only was sales management and management reporting to be improved but also future customer needs were to be surveyed and collected in a systematic fashion with the goal to develop tailor made products.

CENTRAL PROBLEM

The current banking platform and applications did not allow the bank to have a unified view on the existing customers and customer segments. In addition, the new core Avaloq based banking platform was just recently implemented and did not yet have a CRM module. The Advisory Group was tasked to develop a CRM concept, which would enable the bank to fulfill its future CRM goals. The software provider was closely integrated in developing the CRM concept with the aim to start prototyping in an early phase of the project.

OUR ROLE & MANDATE

Our team of one: Analysis & design of a new CRM concept (analytical/operational), implementation support

APPROACH

- Analysis of existing CRM processes and KPIs
- Analysis of the bank's requirements and priorities
- Design of a companywide & fully integrated CRM concept
- Hand-over and support of the CRM implementation

RESULTS

- Detailed the CRM requirements and the priorities
- Conceptual design of CRM processes and activities within the customer teams and the CRM management processes
- Conception of all CRM reports including KPIs
- Implementation of CRM reporting

Success Stories (16) after M&A phases (excerpt)

Changed status quo for a shared service center (IT for banks)

SITUATION

After the departure of a majority of the ownership an established shared service center had to strategically realign itself. In this context the long-term strategy was questioned. For the remaining customers and shareholders the creation of an economically sound and scalable solution to win new customers was to be evaluated and examined. In addition, the compliance of the exiting shareholders with SLAs was to be ensured.

CENTRAL PROBLEM

To ensure the further development of the existing services for the remaining customers as well as to accommodate the demands of the leaving customers, the existing IT-operating environments had to be separated. Strategic options had to be developed for the shared service center. In detail the option of outsourcing, including a vendor screening (long list), had to be assessed. At the same time measures to significantly reduce costs had to be defined and implemented (including massive reduction of operating resources and reduction of personnel costs).

OUR ROLE & MANDATE

Our team of three: Project management de-merger, strategic consulting

APPROACH

- Examination and assessment of strategic options and solution scenarios. Considered chances/risks and critical success factors
- Business case analysis (de-merger case) including the changes in ongoing activities and projects
- Base case post business operation (cost-model)

RESULTS

- Definition and implementation of strategic key initiatives (de-merger & cost-reduction) as a pre-condition for a controlled de-merger
- De-merger blue-print. Creation and contractual implementation of agreements with leaving customers
- Blue-print base case operations

Success Stories (17) after M&A phases (excerpt)

Support in decision making and execution of of a M&A deal

Advisory Group
Management Consulting

Strategic Rational
Finding

Deal
Execution

Post-Merger
Integration

SITUATION

Due to the changed status quo a shared service center (IT for banks) has, after weighing all strategic options including a short list analysis, decided to evaluate the cooperation with a major IT outsourcing provider. All ongoing and planned operations were to be transferred to the outsourcing partner. In an open call for proposals process two providers progressed to the final stage.

CENTRAL PROBLEM

A detailed review for a final evaluation of the proposals was to be conducted with the two providers. A due diligence was conducted with both providers. A business case over a timeframe of ten years was developed with both providers. A subject matter expert, with a deep understanding of the current projects and SLA commitments, was necessary to take the lead in the contract negotiations. A smooth flow of the daily business operations during the contract negotiations was imperative.

OUR ROLE & MANDATE

Our team of two: Project management due diligence, SPA contract negotiations, M&A project management

APPROACH

- M&A project management (methodology & execution)
- Steering Committee coordination & reporting
- Due Diligence support of the potential outsourcing partners (sell-side)
- Analysis & assessments of proposals
- Business case development

RESULTS

- Management & execution of M&A project
- Prepared the foundation for decision making for the sales decision, including a detailed business case over the next 20 years with the new partner (Volume larger than \$ 1 billion)
- Prepared contracts for the outsourcing deal

Success Stories (18) after M&A phases (excerpt)

Planning and execution of a post-merger integration program

Advisory Group
Management Consulting

Strategic Rational
Finding

Deal
Execution

Post-Merger
Integration

SITUATION

After the execution of an outsourcing deal, the necessity developed to integrate the existing organizational structures and the connected ongoing key projects into the outsourcing partner's organization. A detailed integration plan was developed, which not only included integration steps but also a comprehensive optimization and stabilization plan. In this context the whole service portfolio was to be transferred to the outsourcing partner.

CENTRAL PROBLEM

The goal of the post-merger integration program (transition- and transformation phase) was to transfer all existing business activities and assets (consisting of organization, processes, infrastructure, ongoing projects and personnel) to the new partner. In addition, an efficient governance to steer and regulate the outsourcer in the future was to be developed. During the transition phase all ongoing projects had to run on schedule and operations had to continue securely at any time. The transfer of the ongoing projects put high requirements on the structuring and planning of the project team.

OUR ROLE & MANDATE

Our team of two: Project management of the transition and project management of the key ongoing project

APPROACH

- Program management of the most important ongoing projects within the to be transferred organization
- Planning and execution of the personnel transfer
- Finalized the necessary governance
- Novation of existing suppliers

RESULTS

- Successfully executed transition
- Successful implementation of the key ongoing project
- Successful hand-over of responsibility to outsourcing partner on target date
- Established new governance
- Consulted management (buy-side)

Success Stories (19) after M&A phases (excerpt)

IT-Strategy (assessment of new options) for an international Swiss logistics company

Advisory Group
Management Consulting

Strategic Rational
Finding

Deal
Execution

Post-Merger
Integration

SITUATION

Due to exceptional growth, partly based on acquisitions of other companies, a decentralized IT developed over time. Missing standards, guidelines, processes, structures and infrastructures were further fragmented because of different outsourcing and sourcing models in the different countries and global regions. For the company board a global growth strategy was the central focus of all activities. In the context of this growth strategy no large-scale consolidation or migration projects could be started.

CENTRAL PROBLEM

Due to exceptional growth a fragmented and partly incompatible IT-organization and IT-infrastructure had developed over time. IT-costs continually increased because of the diverging sourcing and outsourcing models. Additionally, the group faced an increase in complexities, integration efforts (time and costs) as well as integration risks of newly acquired companies into the group. The Advisory Group was tasked to develop a new IT-strategy including the assessment of potential transformation steps and outsourcing-options (business case evaluation). The feasibility and execution time was in the core of the evaluation.

OUR ROLE & MANDATE

Our team of two: Strategic evaluation (IT-strategy & assessment of outsourcing options)

APPROACH

- Due diligence of the existing IT-environment (organization, processes, contracting & infrastructure)
- Evaluation and assessment of the strategic options and solution scenarios, while also considering chances/risks and critical success factors
- Analysis of Business case and connected investments (projects)

RESULTS

- New IT-strategy including a connected road map for implementation
- Short-term measures for risk-minimization
- Business case scenario including necessary implementation steps and usage effects
- As-is IT outsourcing and sourcing structures including existing restrictions (contracts)

Success Stories (20) after M&A phases (excerpt)

Set-up of a new BPO firm including all related aspects

SITUATION

Set-up of a new shared service center for several banks to allow the consolidation of BPO functionalities in the sectors of payments and securities. The IT-platforms (in particular the technical systems) of the involved banks were different in central aspects. Additionally, a migration of the execution platform by several banks loomed on the horizon. Due to the “political situation” only a short amount of time for the set-up of the company was available.

CENTRAL PROBLEM

The central requirement was to meet the already communicated launch date for the new company. It was, therefore, necessary to prepare and execute a project plan, which clearly stated the priorities and risks, with the involved project partners (several providers). The different IT-systems, which were run by different providers, posed a bigger challenge than previously expected by the involved banks. Therefore, it was necessary to merge different philosophies (technical and process-related).

OUR ROLE & MANDATE

Our team of one: Project manager for the largest outsourcing stakeholders and its provider

APPROACH

- Analysis of the customer requirements and of the different systems of the to be merged stakeholders
- Development of a new concept for the processing of all customers in a centralized environment
- Ensure that the potentials for synergies were realized

RESULTS

- New company was able to start its operation on the planned target date and realize the BPO functions for the customer
- The system environment was integrated into the shared service center, including the necessary processes

Success Stories (21) after M&A phases (excerpt)

Turnaround of a multitenancy out-put-management solution for a service center

Advisory Group
Management Consulting

Strategic Rational
Finding

Deal
Execution

Post-Merger
Integration

SITUATION

To revise the bank wide reporting (external and internal client reports) and to renew the connected BPO management processes, activities, and tools a banking service center initialized a bank wide reporting and output management renewal program. The program included not only the renewals (personalization of customer reports) but also cost reductions in the printing- and delivery center. The costs of every customer document was to be reduced.

CENTRAL PROBLEM

The broadly based reporting and output management program started with a rapid-prototyping-process. As a result essential project-management structures, processes and elements were either insufficiently or not at all implemented before the start of the project. Consequently, the program developed its own momentum, which led to the inclusion of over 50 internal and external specialists. The results were mounting complexities, delayed delivery, increasing project costs, dissatisfied customers and stakeholders as well as the loss of orientation within the project management. As a result the reaching of the BPO objectives was in danger.

OUR ROLE & MANDATE

Our team of one: program assessment, interim management, project management of the overall project

APPROACH

- Analysis/restructuring of the project
- Personnel and interim management
- Creation of a to-be concept for the output management processes and possible cost reductions
- Program re-start and management of the overall project (CHF 14.2 Mio, 8 months)

RESULTATE

- Reduction of the out-of-hand costs – investment protection
- Successful implementation of the should-be concept for the bank wide output management processes and tools
- Prepared the necessary conditions for future cost reductions within the output management

Success Stories (22) after M&A phases (excerpt)

Restructuring of a company to prepare for an M&A deal

Advisory Group
Management Consulting

Strategic Rational
Finding

Deal
Execution

Post-Merger
Integration

SITUATION

As a crisis-management measure an energy company was to be prepared for an M&A deal. The best strategy to solve the crisis was to be defined by assessing different M&A deal opportunities. An overall restructuring of the organization was to be planned and executed. Identifying optimization opportunities and improving the internal and external company processes was necessary to improve the company value.

CENTRAL PROBLEM

The company faced a crisis situation due to fast and uncontrolled growth as well as management mistakes. As an interim manager the Advisory Group was tasked to quickly structure and weigh the problems as well as to develop viable solutions. Restructuring measures were to be defined and to be executed through communicating and negotiating with all relevant stakeholders. It was central to define the functions clearly, reduce overlaps and redundancies and structure responsibilities to increase quality and reduce costs.

OUR ROLE & MANDATE

Our team of two: Program assessment, interim management, project management

APPROACH

- Personnel and interim management
- Restructuring of overall organization
- Development and implementation for collection of outstanding customer payment
- Assessment of strategic options and solution scenarios with a focus on opportunities/risks and critical success factors

RESULTS

- Process optimization and improvement of quality
- Improved company revenue (through reduction of outstanding customer payments by 80%)
- Made strategic decision for best solution to the current crisis
- Prepared the necessary conditions for the implementation of an M&A deal

Success Stories (23) after M&A phases (excerpt)

Integration and support of the company processes after a spin-off

Advisory Group
Management Consulting

Strategic Rational
Finding

Deal
Execution

Post-Merger
Integration

SITUATION

After a spin-off the administrative part of a company was taken over by external management. The newly built structure was to manage the administration of the whole service portfolio. Consequently, the need arose to integrate all existing processes (front-, middle, back-office) into the new organization and harmonize them.

CENTRAL PROBLEM

The challenge was in the identification of the success factors for the integration and then to implement these with a post-merger action plan. The quality of all the integrated and newly set-up processes was to be ensured after the development and execution of the integration strategy. In particular, it was important to implement an appropriate personnel structure.

OUR ROLE & MANDATE

Our team of two: Program management of transition, management of the to be built-organization

APPROACH

- Detailed analysis, implementation of new processes and quality management with interdisciplinary teams
- Planning and execution of personnel transfers
- Budget control – design and implementation of necessary steering and reporting tools to ensure budget control

RESULTS

- Successfully implemented the transition
- Operation of new organization was ensured by integrating staff in key positions
- Quick and successful integration of the company's activities and implementation of new processes

Success Story 24: Project tasks for a development project of an international medical engineering company



SITUATION

The replacement of an out-dated laboratory-automation-instrument led the client to face one of the biggest challenges in the company history. The project involved a variety of topics such as project- and change management, design-to-cost, cost transparency and cost optimization, make-or-buy decisions, validation and optimization production processes, compliance with regulatory specifications as well as risk management and personnel management.

CENTRAL PROBLEM

As the instrument, which was developed and produced by the client, was an OEM production many challenges arose during the project concerning the contracts, which were signed with the American partner company at the beginning of the project. Question regarding production costs, compliance with regulatory guidelines for example with the American FDA, an early optimization of the production process and make-or-buy decisions for the modules of the instrument were central to the client.

OUR ROLE & MANDATE

Our team of one: cost calculations and optimizations, information processing for C-level, general support

APPROACH

- Close tracking of production costs in cooperation with development teams, production engineers and material management
- Development, implementation and support of cost-to-good downsizing project
- Development and support of various process optimizations

RESULTS

- Cost transparency during the project
- Preparation of and presentation to the management board and the CEO
- Development and implementation of optimized production processes:
 - Optimization of material usage
 - Production-KANBAN-system

Success Story 25: Evaluation and implementation of an energy-portfolio-mgmt trading-platform for an energy firm



SITUATION

Due to the restructuring and reform of a global energy company trading teams were newly categorized based on location and topic. In light of this, the existing and the new trading requirements were compared with the existing infrastructure. The results of the comparison showed gaps in the degree of coverage between the current and new requirements. The global re-organization and the relocation of the company headquarter complicated the project plan.

CENTRAL PROBLEM

The Advisory Group was tasked to compare the new requirements for the newly created trading teams with the functionalities of the existing trading platform and to close gaps by extending the trading platform (system evaluation). The evaluation – prepared by the Advisory Group – was to serve as the foundation of an implementation plan, with the goal to quickly introduce the new modules at the company headquarter. A project, together with the system provider, was to be planned and executed.

OUR ROLE & MANDATE

Our team of one: Project management, controlling, preparation / implementation «reconciliation» concept

APPROACH

- Evaluation of the current and the new trading platform
- System evaluation and decision making for the trading platform enhancement
- Project planning, initialization and execution
- Coordination of the concept creation

RESULTS

- Conception of the trading platform enhancement – investment protection
- Mobilization of an effective project team
- Successful implementation of the to-be goal of the new trading platform
- Prepared and implemented necessary key concepts based on the requirements

Success Story 26: Process analysis and optimization of the processing and the sales units for a Swiss energy company



SITUATION

The market unit in southern Europe implemented an aggressive growth strategy, which led to an unexpected short-term growth of trading volumes that the department responsible for retail and processing. The local organization was swamped by a large amount of “dealtickets” and was not able to guarantee deal checking on a daily basis. The systems environment and the existing contract management structure was complex and did not allow an efficient processing of the clients. Additionally, the customer processing relied on complex contracts.

CENTRAL PROBLEM

The daily processing and settlement as well as the on-going projects led to a constant overload of the responsible team. The Advisory Group was tasked to optimize the processing for the de-centralized southern European organizational units. In a first step, the development and implementation of measures to optimize the processing at the local units was executed. In a second step, a strategy (including an action plan and an implementation model) for the processing of the local unit’s energy trades was developed. The strategy was developed in cooperation with the Swiss headquarter.

OUR ROLE & MANDATE

Our team of two: Analysis-, conception and action plan in Switzerland and southern Europe

APPROACH

- Analysis of status quo, quantity structure, processes, systems and processing time
- Assessment of initiated measures
- Examination of cost effectiveness of the current processing of customer portfolios
- Prepared business case
- Prepared to-be processing model

RESULTS

- Classification of process bottlenecks
- Segmentation of customer portfolios based on a processing lens
- Deducted options for action and measures to improve processing
- Implementation plan to establish to-be processing model in southern Europe

Success Story 27: Development of a „fee-based“ managed-service settlement model for services



SITUATION

As a result of market changes in the automotive sector an international IT-company was tasked by one of the world's biggest car manufactures to develop a new managed services concept. A central part of the concept was to be a "fee-based" or units costs oriented fixed-price model for future services. The new pricing model was to include all relevant costs, easily billable and develop on a diminishing costs scale for the customer.

CENTRAL PROBLEM

The Advisory Group was tasked to analyze the IT-service provider's service portfolio for the car manufacturer in regard to the new managed service requirements. A GAP analysis was to be prepared including the necessary measures to move the current service portfolio into a managed services portfolio. The basis for the transformation was to be a new "fee-based" pricing model. The model was to not bill services based on a time & material approach but based on "flat-fess" (as in the telecommunications sector).

OUR ROLE & MANDATE

Our team of one: Analysis-, conception of an action plan to implement the new managed service pricing model

APPROACH

- Analysis of the existing service delivery service- and pricing models
- Analysis of existing cost-structure and calculation models
- Deduction of necessary requirements for a managed service pricing- and organizational model („To-be operations based on the new pricing“)

RESULTS

- Developed a new managed service pricing- and billing model
- Deducted a new to-be operations model founded in the pricing- and billing model (managed services)
- Prepared a transformation plan for a successful implementation of the new business model

Success Story 28: Analysis and conception of «Asset Management Realignment» for a Swiss bank



SITUATION

During two years of discussions regarding the extension of the asset management business within a large Swiss bank various ideas, concepts and documents were created through all levels of management. The office responsible for institutional clients actively propagated plans to increase the existing product portfolio (launch new funds) and to source the necessary IT-platform externally in the future.

CENTRAL PROBLEM

The Advisory Group was tasked to review and assess all existing ideas, concepts and discussions and to aggregate these into a concise plan "Realignment Asset Management". The plan was serve as management board's foundation for decision making. The to be assessed concepts, which had developed over a time frame of two years, were for the most part incomplete and unstructured in form and content. In addition, the concept "Realignment Asset Management" was to include an authoritative business case, which outlined revenues and expenses for the next five years.

OUR ROLE & MANDATE

Our team of one: Analysis-, conception of the implementation plan «Realignment Asset Management»

APPROACH

- Analysis of the priorities regarding the future business segment, including necessary pre-conditions
- Analysis and presentation of opportunities and calculation of realistic revenues
- Preparation of a necessary investment- and business plan to realize the identified revenue- and efficiency opportunities

RESULTS

- Prepared a 5-year business case based on cut revenues (commissions) and the development of new revenue opportunities (new fund products)
- Prepared a decision making basis for the management board (various scenarios)
- Prepared an implementation plan for the realignment of the existing business segment

Success Story 29: Implementation (Change) of an «Asset Management Realignment » for a large Swiss bank



SITUATION

Based on the prepared 5-year business case for the realignment of a Swiss bank's existing asset management operations, a bank-wide project was initiated to implement the necessary changes. The goal of the project was to implement the identified potentials and to set the necessary conditions for a further professionalization of the bank's asset management unit. Within this context several potential outsourcing contracts were already on hand, which had to be stopped.

CENTRAL PROBLEM

The Advisory Group was tasked to plan, initialize and implement the realignment and professionalization of the existing asset management unit. Fragmented, partly overlapping and manually executed processes and structures had to be optimized. Inefficient and partly non-integrated IT-tools had to be revised. The existing data basis quality had to be improved. Moreover, the project included a revision of the existing custodian bank setup and the fund management regarding pricing, IT-costs and process integration. Lastly, the launch of the new funds was to be integrated into the implementation plan.

OUR ROLE & MANDATE

Our team of five: Project management, sub-project management, business analysis and quality control

APPROACH

- Conception of efficient processes and structures within the portfolio management
- Evaluation and implementation of reliable portfolio management system
- Conception of efficient processes regarding the custodian
- Initialized the extension of the current funds portfolio (based on business case)

RESULTS

- Evaluation and implementation of a new custodian bank & fund management including costs reductions
- Evaluation and implementation of a new portfolio management system
- Implemented new organizational structures and processes (across business units)
- Successfully launched new funds to create new revenue sources

Success Story 30: Analysis of new compliance requirements (FIDLEG) and the connected necessary changes



SITUATION

In the context of ongoing changes to the market (future loss of commissions) on the one hand and new compliance rules on the other hand, a Swiss bank decided to conduct a "FIDLEG" impact analysis. Several ideas and considerations by different business units were already at hand, which were to be revised and in regard of future changes to be assessed and modeled. In addition, the impact of FIDLEG on IT-systems was to be examined.

CENTRAL PROBLEM

The Advisory Group was tasked to plan a "FIDLEG" impact analysis and conduct it within a time frame of 3 months in cooperation with internal specialists. Staff from the units of IT, legal and compliance were to be integrated in the analysis process. The goal was to examine the relevant content of the FIDLEG draft, its relevance for the bank and ongoing projects as well as an assessment of the bank's status quo regarding a FIDLEG implementation. In addition, an action plan was to be deduced, which detailed the costs and the necessary time, of how to close bank's Gaps.

OUR ROLE & MANDATE

Our team of one: Project management of FIDLEG «Impact Analysis», preparation of content and results

APPROACH

- Segmented the FIDLEG draft legislation into likelihood of implementation and impact for the bank (organizational, processes, IT-systems, ongoing/planned projects)
- Assessed the needed time, funds, resources and risks needed to implement the changes caused by the FIDLEG legislation

RESULTS

- Prioritized the FIDLEG requirements based on likelihood of implementation and impact on the bank
- Identified the necessary actions – based on a subset of 14 articles – regarding the bank's organization, processes and IT-systems
- Quantified the implementation effort

Success Story 31: Analysis and conception of a new range of investment products for a Swiss bank



SITUATION

Due to declining and ceasing revenues on the one side and regulatory requirements (FIDLEG) on the other side a Swiss bank decided to revise its range of investment products. A new range of products for bank's current and future customers was to be designed based on the results of the analysis. It was to be examined if the new products could be designed without the usage of commissions.

CENTRAL PROBLEM

The bank tasked the Advisory Group to examine the current product range in regard of future revenues and risks. Additionally, the end of revenues through commissions and the connected partnerships were to be included in the assessment and critically examined. Based on the results of the assessment and the connected changes in the overall market, a new range of investment products was to be developed. Moreover, a plan to launch the products with the goal to close revenue gaps was to be developed.

OUR ROLE & MANDATE

Our team of two: Project management of the analysis and conception for the new range of products

APPROACH

- Analysis and calculation of the existing revenues sources and revenues declines due to changes in the market environment (incl. loss of commission revenues)
- Conception of new revenue sources through new retail-funds («strategy-funds») and fee models
- Definition of pre-conditions (org., processes, IT and compliance) for the launch of new products

RESULTS

- Prepared a new range of products for the bank's customers to close revenue gaps:
 - Preparation of own funds (strategy-funds) for the whole private banking sector
 - Developed new fee models for the whole private banking sector
- Prepared concept for the launch- and implementation of the new range of products

Success Story 32: Cost-benefit analysis for the trading unit and designated investment exchange for a Swiss bank



SITUATION

As the volume of trades and the revenues had declined for some time, a Swiss bank decided to critically analyze its trading unit including its designated investment exchange in regard of profitability, cost-reduction opportunities and a potential new direction. The current trading unit was to be adjusted to the current organization and its upcoming realignment (including cost reductions).

CENTRAL PROBLEM

The bank tasked the Advisory Group to review the current processes within the trading unit and to analyze and showcase cost-reduction opportunities in the daily business operations. In addition, an objective re-calculation of the trading units profit-loss results was to be executed. Based on the compiled P/L results and the identified cost-reduction opportunities the Advisory Group was to present an action plan (short-, medium-, long-term measures) through which the optimizations could be implemented. The implementation of the optimizations was to be fully executed by the end of the next business year.

OUR ROLE & MANDATE

Our team of three: Planning and implementation of the cost-benefit-analysis for the trading unit

APPROACH

- Implementation of a cost-benefit-analysis with the goal to achieve quantifiable cost-reductions by the end of the next business year
- Identification of existing inefficiencies and reducible expenditures («unnecessary costs») within the current service portfolio
- Preparation of an implementation plan

RESULTS

- Re-calculation of the real profit-loss returns per desk, team, product group and service
- Analysis and classification of the existing trading activities and expenditures in the daily business operations
- Realignment of the trading unit based on the calculated break-even points

Success Story 33: Preparation of action plan for the migration of a core banking platform and outsourcing provider change



SITUATION

Within the client's organization the change of the corebanking platform and the connected change of the outsourcing provider was discussed. The discussions showed that the involved parties within the client's organization interpreted the problem differently. To channel future discussions differently an action plan was to be developed, which laid out the central points that the client had to consider in regard of a corebanking platform change and the connected outsourcing partner change.

CENTRAL PROBLEM

The Advisory Group was tasked to prepare a basis for planning for an alternative outsourcing scenario. This scenario was to include the corebanking platform migration and immediate actions to guarantee the success of such a migration. The plan was to ensure the migration of the overall corebanking system, its platform and its applications. The plan was to not only serve as an «awareness» basis for the bank's decision makers, but also as a stepping stone for future planning and project activities.

OUR ROLE & MANDATE

Our team of two: Prepared action plan for corebanking solution migration and outsourcing partner change

APPROACH

- Analysis and documentation of existing risks with current provider (BCM)
- Definition of next steps in the areas of corebanking platform «new» and «old» solution and existing project portfolio
- Summary of all necessary activities within the next three months until the migration and stabilization project was fully initiated

RESULTS

- Preparation decision-maker presentation on the action plan for the core banking solution migration and outsourcing partner change
- Planning and role-definition for the migration project
- Definition of necessary immediate measures to stabilize the current solution until the end of the necessary migration

Success Story 34: Transformation of the delivery organization of the client-services into a managed service model



SITUATION

The necessity to comprehensively and to successfully transform the existing delivery organization from a T&M approach to a managed service approach posed a bigger than expected challenge for the client. As required by a strategic customer and because of the goal to offer scalable state-of-the-art managed services in the future the client opted for a comprehensive transformation.

CENTRAL PROBLEM

The Advisory Group was tasked to transform the IT-service provider's existing service portfolio into a new managed service based portfolio, along with transforming all connected processes and managing the necessary cultural change within the company. The foundation of the new service portfolio was the new operating manual (including process documentation), which was developed by the project. The new managed service model was presented and coordinated internally (service provider) as well as externally (customers of service provider).

OUR ROLE & MANDATE

Our team of three: Conception and implementation of the transformation towards the managed service

APPROACH

- Definition and compilation of a new process-map (based on ITIL-processes; inclusion of customer-specific processes)
- Analysis of existing processes. Deduction of efficiency improvements through managed services, analysis of process-differences (as-is/to-be)
- Customer communications – and change planning for the new scalable service model

RESULTS

- Definition of all ITO-processes based on ITIL V3 under consideration of customer requirements and the need for a scalable service model
- Prepared offer including a description of the new managed services for the customers
- Change management processes (for the management)
- New operations manual

Success Story 35: Evaluation of a new portfolio management system for a Swiss bank



SITUATION

To launch new investment products and to professionalize the portfolio management a new, comprehensive and fit for revision portfolio management system was necessary. The system had to fulfill the new demands on the asset management, be easily integrated into the existing IT-architecture and core banking solution and act as the base for the replacement of the current system. As a result several requirements existed on the side of the bank, which led to different preferred solutions.

CENTRAL PROBLEM

The Advisory Group was tasked to evaluate the new portfolio management system. The different requirements within the bank had to be collected for a request of proposal (RfP) and to be compared with the different suppliers in a call for proposals. After a frontrunner had been identified all assumptions were verified in detail with a proof of concept approach. The results were prepared in a basis for decision-making. Afterwards the project approach to implement the new solution was detailed and the necessary contracts (license, maintenance, project) finalized.

OUR ROLE & MANDATE

Our team of two: Evaluation of portfolio management system until start of integration

APPROACH

- Compilation, formulation and prioritization of all requirements by the relevant business units
- Preparation of request of proposals
- Implementation of a call for proposal
- Assessment of received proposals and offers, including proof of concept

RESULTS

- Prepared a Request of Proposals (RfP)
- Assessed all received proposals
- Analysis and evaluation of received offers
- Prepared basis for decision making for management board
- Prepared contracts regarding licensing, maintenance and the project with the suppliers of the new system

Success Story 36: Implementation of new range of investment products and connected IT-function for a cantonal bank



SITUATION

A new range of investment products had been defined and a new portfolio management system had been implemented in advance. For the new range of investment products central functions such as funds, fact-sheets, investor profiles, monitoring and customer portfolios had to be defined and implemented. The implementation was completed in close cooperation relevant business units and involved business partners (solution providers). Due to several dependencies a close management of the implementation process was imperative.

CENTRAL PROBLEM

The bank tasked the Advisory Group to take on the project management to implement internal changes (banking, processes and IT) connected to the new range of products. In this context detailed plans for the several sub-projects were created and mixed-teams set-up. The mixed teams included as much as possible staff from the bank's appropriate business units, the client's business analysts, external suppliers, the Advisory Group project managers and the Advisory Group business analysts. The implementation was set-up as a structured program, including all necessary steering mechanisms (including governance, reporting and risk management).

OUR ROLE & MANDATE

Our team of six: 1x overall project manager, 2x sub-project manager and 3x business analysts (incl. PMO functions)

APPROACH

- Prepared a detailed project plan, including a detailed plan for 26 sub-projects
- Establishment and steering of the overall project organization, including project governance (committees, escalation management and scorecards)
- Management of project resources (staff, budget)
- Vendor management

RESULTS

- Monitoring of all milestones of the sub-projects to secure an in-time implementation within budget, time and quality
- New range of products was presented to the bank and the bank's customers in time
- Definition and documentation of all related new business processes

Success Story 37: Analysis and Design of a global IT-Strategy, including Roll-Out and Change Management Plan

Advisory Group
Management Consulting



SITUATION

Based on different company acquisitions, an international multiple was facing an increasing fragmentation and complexity of their current IT application landscape. Different long-term programs (SAP migrations, application renewals etc.) increased the necessity within the corporate management board to renew their current IT strategy. The IT perception increased within the corporate leadership board that the current IT strategy is not adequate to face the next century challenges and becoming more agile and address IoT and digitalisation topics.

CENTRAL PROBLEM

The company tasked Advisory Group to review the current IT- and Operationsstrategy and related ongoing projects and defined priorities. Based on the strategy review results the Advisory Group team started to design a new IT Strategy, in collaboration with the management teams of each division. The new IT Strategy should outline clear improvements, based on a robust business case. Buy-in for the new IT Strategy from the divisional senior management teams and the corporate management team was necessary to sign-off the new strategy and start roll-out.

OUR ROLE & MANDATE

Our team of 2: 1x overall project manager, 1x senior management consultant

APPROACH

- Review current IT- and Operationsstrategy, and related initiatives and priorities
- Conduct senior management interviews of each division and with the corporate management team
- Compare findings with current strategy papers (strategic GAP Analysis)
- Design new IT Strategy and related initiatives, including a 5-year-roadmap

RESULTS

- Re-Design of IT Strategy requirements from the business side, including related priorities
- Design new IT Strategy, including key trends and targeting unrealised company potentials
- Design a new IT Strategy implementation roadmap, including related project portfolio of necessary initiatives (alignment of current IT core competencies)

Success Story 38: Analyse and Design of a global Sourcing Strategy, Business Case and Implementation Plan



SITUATION

A global insurance and asset management company was trying several waves to improve and initialise a valuable sourcing set-up to address and fulfil the corporate efficiency goals and improve current customer qualities – based on a more flexible target operating model. In this relation, current inefficiencies were analysed and possible sourcing scenarios should be derived, based on their possibility to address the company goals and the current strategy of the corporation. The new sourcing strategy should include a clear business case and roll-out roadmap.

CENTRAL PROBLEM

The Advisory Group was tasked to advise, coach the current senior management team how to develop a new and effective sourcing strategy. The current sourcing setup should be reviewed and weaknesses (including obstacles) derived. The Advisory Group project manager was tasked to develop a new sourcing strategy with the current senior management team, including the coaching of individual senior management team members. The new sourcing strategy should outline a clear business case and roll-out / implementation plan. Necessary pre-requisites needed to be described and prioritised in an overall re-structuring proposal for the global strategy board.

OUR ROLE & MANDATE

Our team of : 1x overall project manager/senior management consultant

APPROACH

- Review of current Sourcing Strategy and setup, including analysis of related GAP's
- Managing the strategy design process, in close collaboration with the senior management team
- Coaching of individual senior management team members according to latest sourcing strategy best practices and industry cases
- Design new Sourcing Strategy / Business Case

RESULTS

- Design new Sourcing Strategy, based on identified sourcing potentials
- Design implementation plan to establish necessary sourcing pre-requisites
- Design investment proposal to corporate strategy board to roll-out transformation
- Establish new target operating model and sourcing setup of the company

Success Story 39: Setup and Implementation of a company-wide Business Transformation (Re-Structuring)



SITUATION

A global insurance company decided to initiate and implement a company-wide business transformation program. In this relation, a new target operating model should be implemented to address current and future market challenges (including decreasing margins). The new operating model should establish organisational flexibility, improve efficiencies and strengthen the company's current customer centricity. In this context, the program is tasked to assure that all business and IT concepts are designed on latest industry standards and best practices.

CENTRAL PROBLEM

The Advisory Group was tasked by the senior management team to detail, initiate and manage the company-wide business transformation program, based on the approved investment proposal. In this relation the defined transformational business case should be realised (efficiency improvements; processes, organisation, financials and sourcing potentials). The transformation plan included six different workstreams alongside target operating model layers. A detailed change and implementation plan was designed for each workstream (Organisation and Roles, Cross-Functions/Architecture, Operations, Finance, Sourcing and Change Management) including deliverables.

OUR ROLE & MANDATE

Our team of 2: 1x overall program manager and 1x subject matter expert

APPROACH

- Initialization and management of the company-wide transformation program
- Business Case Monitoring
- Coaching of project teams across workstream on all hierarchical levels (teams and senior management)
- Design and review key concepts
- Manage Change Management tasks

RESULTS

- Successful implementation of the business transformation goals and objectives
- Establish necessary pre-requisites to implement a new sourcing strategy
- Realisation of defined business case
- Successful management of relating change management and transformational key tasks

Success Story 40: Initialisation and Execution of a company-wide Request-for Information/Proposal (Outsourcing)



SITUATION

A global Insurance and Asset Management company decided to roll-out a company-wide transformation (re-structuring) program. In this relation a new target operating model should be defined and implemented, according to changing customer environments. Increasing cost pressure and the need to operate more flexible – alongside fast changing market conditions – a new operating model was needed. The new target operating model should include the possibility to source different business and IT services, based on best practice standards and policies.

CENTRAL PROBLEM

The Advisory Group was tasked by the senior management team to design and implement a company-wide Outsourcing request-for-information (RFI) and request-for-proposal (RFP). The selection of a new outsourcing service provider should enable the company to realise the defined sourcing strategy and related business case. The service provider partnership should be aligned with the concept of the new target operating model of the company and related organisation, roles and responsibilities, processes, development and operational environment. The sourcing scope was based on a global scale for the entire organisation and third party business partners.

OUR ROLE & MANDATE

Our team of : 1x overall program manager and 1x subject matter expert

APPROACH

- Design of necessary service provider selection documents (including RFI/RFP documentation)
- Design a service provider Long-List
- Design RFI Documentation (80 pages)
- Design RFP Documentation (1250 pages)
- Manage and coordinate the entire service provider selection process

RESULTS

- Successful design of necessary Outsourcing documentation (RFI/RFP)
- Definition of a service provider Long-List including selection and scoring process
- Validation and update of outsourcing related business case
- Support in the service provider selection and negotiation process