Finansbank enhances competitive advantage with greater control of 500 IT projects

FINANSBANK

CUSTOMER PROFILE
Industry: Financial services
Company: Finansbank/IBTech
Profit: 344 mio TRL (230 mio USD) by 2010 H1
Employees: 10,000

BUSINESS
Finansbank provides commercial and retail banking as well as insurance, leasing and investment management services to customers throughout Turkey. IBTech is the company's IT services subsidiary.

CHALLENGE
As IBTech is playing a crucial role in initiatives that increase competitive advantage for Finansbank in the market, it must be able to manage its projects, resources and finances effectively.

SOLUTION
CA Clarity™ Project and Portfolio Management (PPM) contains records for 2,500 live and archived projects. The solution automates reporting, simplifies resource allocation and helps to ensure compliance.

BENEFIT
IBTech has real-time view of its projects, resources, and finances with project reports and dashboards created in minutes. With CA Clarity PPM, IBTech has the capability to improve resource allocation and increase efficiency.

we can

ca
technologies

Business

Providing IT services to Turkey's banking industry

Finansbank is one of the top five Turkish banks with more than 480 branches and 10,000 employees. As well as commercial and retail banking services, Finansbank provides pension funds, life insurance, leasing, factoring, portfolio management and investment services via a number of Turkish subsidiaries.

Finansbank was established in 1987 and is partially owned by the National Bank of Greece.

In 2005, Finansbank's IT department became a separate subsidiary known as IBTech. Entirely owned by Finansbank, 95 percent of IBTech's activities relate to the parent organisation with the remaining 5 percent encompassing services and consultancy for the wider finance industry in Turkey.

Challenge

Improving the delivery and management of IT projects

With total responsibility for Finansbank's IT infrastructure design, application development and service management model, IBTech must ensure all its projects are managed effectively to safeguard the development of the bank's business.

"The projects we manage on behalf of Finansbank are key to its day-to-day operations."

Metin Ornek

Manager, Department of Planning and Analysis, IBTech

For example, IBTech designs and develops Finansbank's Core Banking solution and also new platforms such as mobile banking, social networking, fraud detection solutions and next generation contact centre solution. The IT organisation also manages projects that ensure the bank remains compliant with Basel II legislation.

Metin Ornek, Manager, Department of Planning and Analysis at IBTech, comments, "The projects we manage on behalf of Finansbank are key to its day-to-day operations and competitive advantage."

IBTech has PMP (Project Management Methodology)-certified project managers working from a centralised project management office, which had been using Microsoft Project Server 2003 since 2004 as the supporting tool for its activities. However, as IBTech's project management maturity increased, it needed greater functionality and configurability to streamline key processes and enable automation.

"Reporting on the project portfolio was time-consuming and lacked consistency, particularly as we were unable to put in place rigorous controls around timesheet entries," comments Ornek.

Resource and financial management were also challenging. As a result, IBTech wanted to improve its ability to plan resource capacity in advance and simplify charge-back processes.

"To invoice the appropriate Finansbank department or external customers, we had to extract data from Microsoft Project Server to Excel spreadsheets and manually calculate invoices," explains Ornek. "This process was lengthy and needed too many controls."

Solution

Comprehensive project, portfolio, resource and financial management
IBTech needed a complete solution not only for fulfilling its functional requirements for project, portfolio, resource and financial management but also user-friendly, highly configurable and easy to integrate.

The company spent 18 months evaluating a range of project and portfolio management solutions. During this time, IBTech attended workshops, visited reference sites and issued a complex request for proposal (RFP) with more than 200 questions. The company eventually selected CA Clarity PPM in September 2008.

CA Technologies' Champion Clarity partner TAC was the prime contractor for consultancy and implementation services of the project. After analysis and design phases, Clarity workshops were delivered to more than 50 people by TAC. After that, key members of the project management office attended CA Technologies' functional and technical boot camps, as Ornek explains, "The CA Technologies training was extensive and provided us with an in-depth understanding of the solution and how we could configure it to meet our needs."

To entirely centralise its project data, IBTech needed to be able to access historical information in CA Clarity PPM. The company partnered with governance, risk and compliance specialists TAC to accomplish this task. "TAC migrated seven years' of data from Microsoft Project Server to CA Clarity PPM. This included records for 10 million financial transactions," comments Ornek.

Improving governance with best practices

CA Clarity PPM is now used by 50 project managers, 30 resource managers and 200 team members at IBTech on a daily basis. The solution contains data on more than 2,500 projects, including 200 active projects and 300 pipeline initiatives. These projects range from transformational programmes involving hundreds of staff members to the day-to-day management of IT incidents.

Using CA Clarity PPM, IBTech has been able to implement greater controls to improve governance. For example, the CA Technologies solution is configured to align processes with the Control Objectives for Information and related Technology (COBIT) best-practice framework by the COBIT experts of TAC and IBTech PMO.

As part of its governance efforts, IBTech has adopted a stage gate system to track deliverables and automate approvals processes. These stages include:

- Discovery

- Ongoing

- Live

- Post-implementation review

- Archive.

2,500

records for archived and live projects in CA Clarity PPM

Ornek comments, "By analysing the time and money allocated to a project at each stage, we can identify recurring bottlenecks and prevent delays."

Risk management is also simplified using CA Clarity PPM. "We have defined a set of risk categories and sub-categories in alignment with our project management methodology so we can easily spot potential problems and make business decisions based on accurate risk analysis," explains Ornek.

Streamlined reporting and resource allocation
As well as standardising and streamlining processes, CA Clarity PPM increases efficiency through its collaboration and integration features. For example, the solution is integrated with Business Objects to automatically produce detailed reports that include:

- An annual project roadmap

- Resource efficiency and allocation

- Project status

- Service costs.

"CA Clarity PPM enables us to deliver better and quicker project-based services to Finansbank."

Metin Ornek
Manager, Department of Planning and Analysis, IBTech

Finally, CA Clarity PPM is integrated with a homegrown demand management system, configuration management system and HP asset management solution to ensure consistency and eliminate the need for manual duplication of data.

IBTech is currently involved in beta testing for CA Clarity PPM r12.1. "We have been testing out new reporting functionality in the latest release of CA Clarity PPM and are excited to have even greater data management capabilities and analysis with its interactive dashboards and simplified report creation and collaboration," explains Ornek.

Benefit

Increased efficiency and greater governance

By increasing the maturity of its project management processes with CA Clarity PPM, IBTech has been able to vastly increase efficiency. Time savings achieved since using the solution include:

▪ Portfolio reporting reduced from one week to one hour

▪ Charge-back reporting reduced from two weeks to three hours

▪ Resource capacity reporting reduced from several weeks to just minutes.

"Using CA Clarity PPM we are able to ensure that projects are managed in accordance with our governance framework while reducing the workload for project managers," comments Ornek.

By linking projects and resources to budgets and finances, the CA Technologies solution has also helped enhance financial management, as Ornek explains, "We use an ITIL compatible project-to-service framework and CA Clarity PPM's automated billing capabilities to streamline charge-back to our customers, including both Finansbank departments and other organisations."

As a result, IBTech has been able to increase the accuracy and efficiency of customer billing. The solution has also helped IBTech:

▪ Improve resource allocation and capacity management

▪ Make more informed business and investment decisions.

"CA Clarity PPM enables us to deliver better and quicker project-based services and information to Finansbank, which in turn means Finansbank can offer rapid and more efficient technology-based services to its customers," concludes Ornek.

TAC combines CA Technologies solutions with its consultancy expertise to help organisations improve the quality of IT services and business processes. It provides ITIL, PPM and COBIT consultancy from assessment and planning through to implementation and audit. Established in Turkey in 1999, TAC specialises in three main areas: Governance Risk Compliance (GRC), Technology and Education. TAC GRC provides solutions to improve the quality of IT services and business processes by giving consultancy, education and services through implementing CA solutions. The company manages ITIL, PPM and COBIT from assessment and planning to implementing and audit. TAC Technology supplies solutions and services for telecommunications, enterprise network, systems, applications, databases, project management, recovery management, service desk and security management. TAC Education offers business process consultancy using ITIL, PPM and COBIT. TAC is the first company providing COBIT Foundation training in Turkey.