

# The Challenge of Implementing an Enterprise Level Requirements Management Process



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# Agenda

- The Catalyst
- The Change Program
- The Challenges
- The Benefits
- The Future

# The Catalyst

# NAB ASX Announcement August 6, 2008



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## ASX Announcement

Wednesday, 6 August 2008

### Building a platform for sustainable out-performance

National Australia Bank (NAB) today announced the first phase of its Next Generation Platform initiative that will involve the replacement of its core banking systems over the next five years to underpin its strategy for sustainable out-performance.

"Over the past three years a significant program of work has been underway to successfully turnaround the Australian business. This work was completed in 2007," said Mr Ahmed Fahour, Executive Director and Chief Executive Officer Australia.

"Through our focus on the customer, with an investment in our people, products, quality and efficiency, we have been able to sustainably improve our performance.

We are now well positioned to embark on the next wave of our strategy," said Mr Fahour.

The Next Generation platform strategy has been developed over 18 months following a robust process leveraging industry and internal experts and an extensive evaluation of potential vendor partners.

"It has been a highly collaborative process, involving leaders from right across our Australian business, including the Board," said Mr Fahour.

NAB has selected Oracle to partner with for the first phase of its Next Generation Platform strategy. Phase one will involve the delivery of a platform for the Star Direct business, a new business that NAB has previously flagged to the market. The Star Direct business will include a specialised, low cost, high service direct bank that will be launched later this year.

"This is a significant investment for NAB and we plan to take a very phased and measured approach over the next five years," said Ms Michelle Tredenick, Chief Information Officer Australia.

"Our existing IT systems have served the business well to date, however they are not sufficient to support our future strategic direction.

"We have strong support throughout the organisation, with the program to be managed and governed by the Australian Executive team. We are confident that the time for change is now," said Ms Tredenick.

While Oracle is delivering the platform for the Star Direct business, NAB will plan the second and subsequent phases of the strategy in parallel. This planning is expected to take approximately six months to complete. It is at this time that NAB will be in a position to share further detail on how it plans to sequence this program and confirm who it will partner with going forward.

"It is expected that the Australian investment, which is a multi-year program, can be accommodated within our existing investment spend across the Group," Mr Fahour concluded.





What is the Next Generation Banking Platform?

# What is Next Gen?

- The Next Generation Banking Platform is a 3 to 5 year program to replace NAB's core Banking systems
- The program will implement selected financial systems from the Oracle suite
- The program will run large parallel projects
- All projects will require extensive integration to legacy assets



Time to rethink

# The Gaps

- Alignment of BA teams across NAB
- Enterprise Requirement Model
- Knowledge Management
- Tooling
- Training
- Methodology
- Templates & Artifacts





**In the Beginning**

***Our 2008 Change  
Agenda had to be  
refreshed to meet the  
new landscape***

# Back to Planning



# Back to planning

- We formed a small team of dedicated and passionate people to own the change program.
- The team commenced the task of identifying what was required to make the program successful.

# The Change Program

# Beginning the Ascent



# Beginning the Ascent

- We had to hit the ground running.
- What was industry best practice for enterprise level requirements management?
- Early in the change program we engaged IBM to provide insight on global trends.

# Aligning the BA Teams

Business Analysts  
from our Practice

Business Analysts  
from Business  
pools

Contractor and  
Professional Service  
Business Analysts

Internal Subject  
Matter Experts



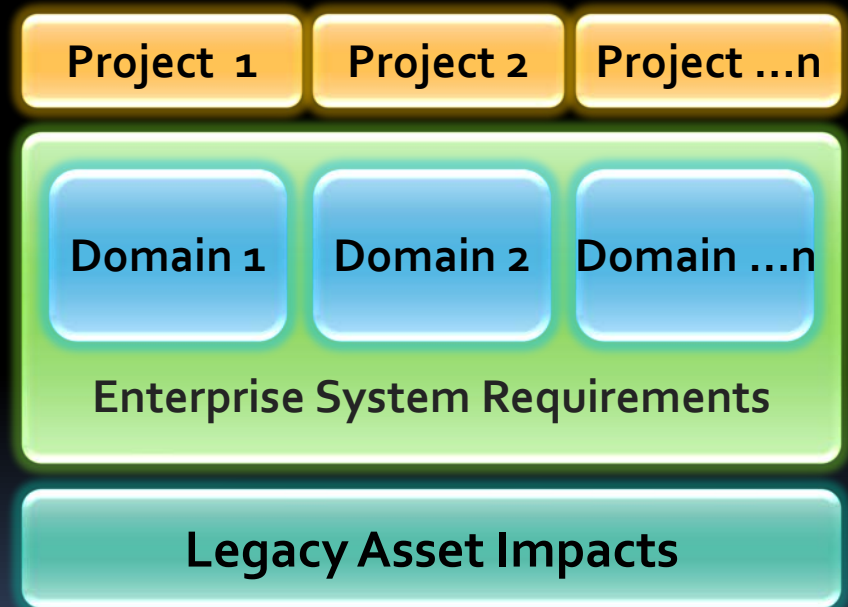


# Enterprise Requirements Model

## Project Centric



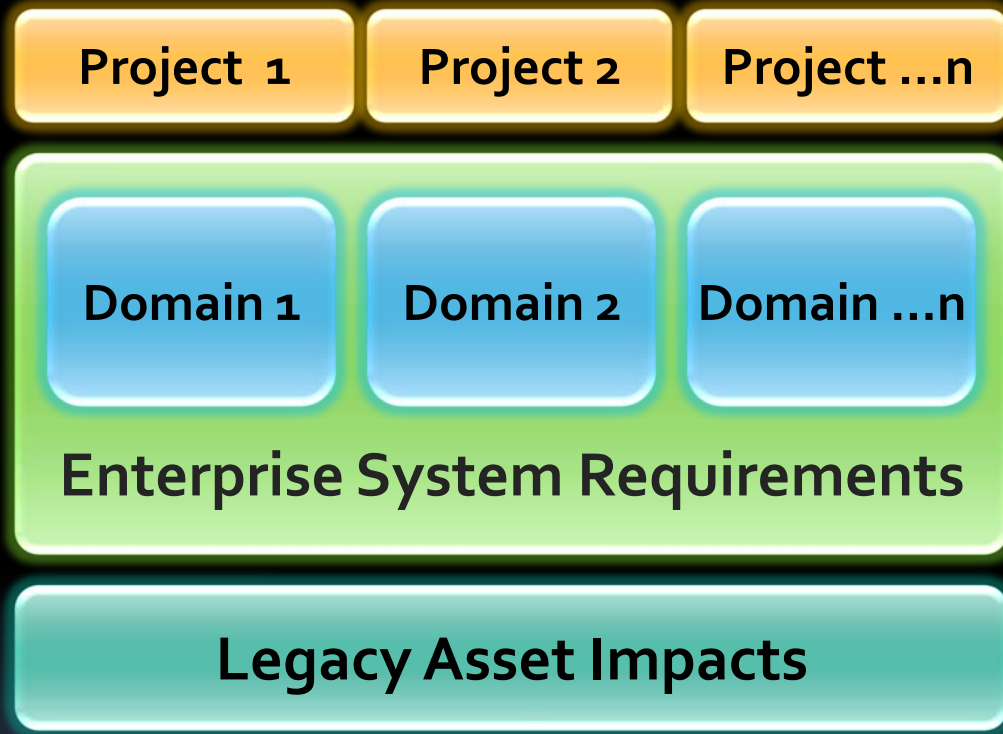
## Enterprise Centric



# Building knowledge domains



# Tooling – Rational Requisite Pro

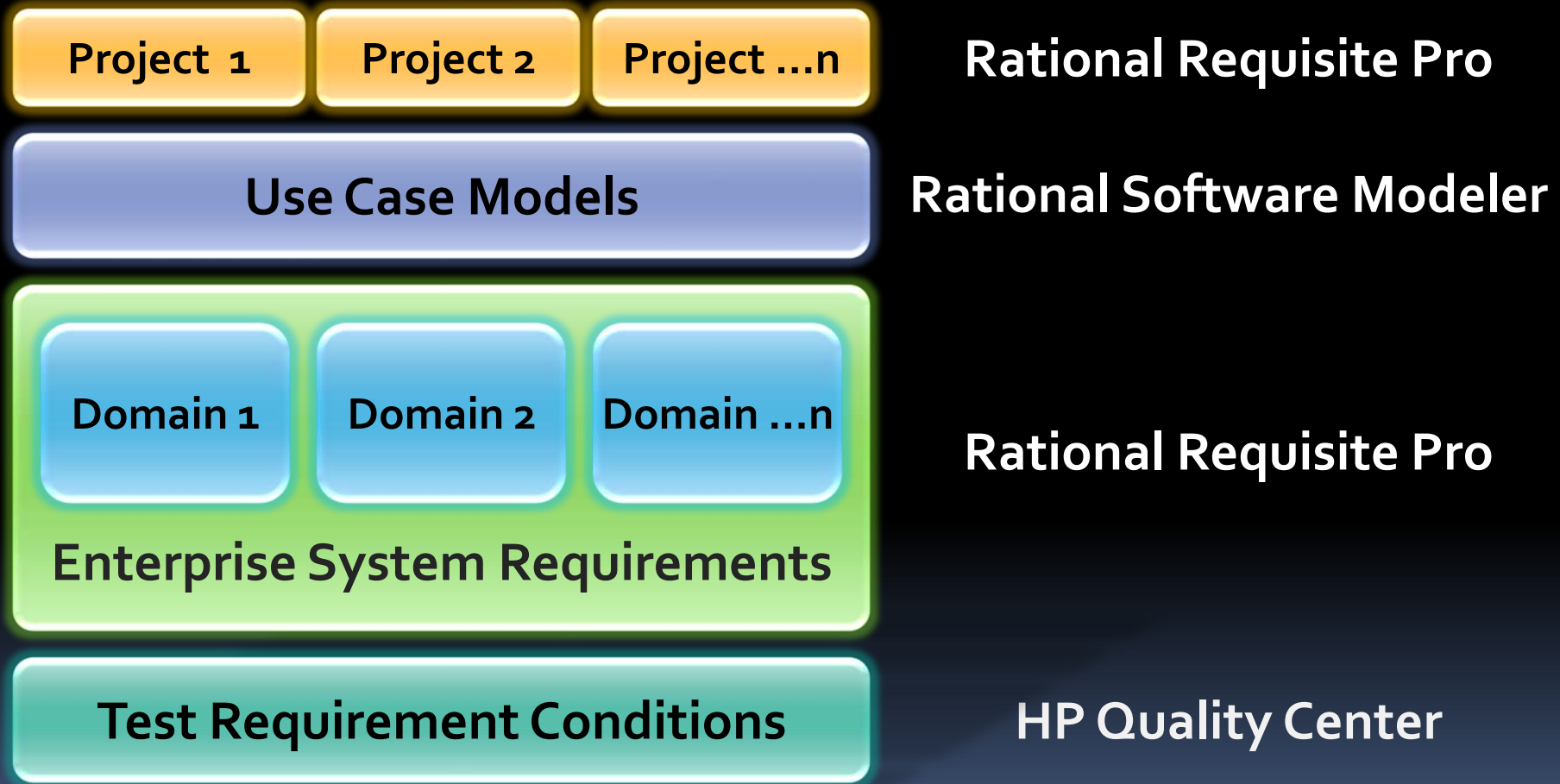


## IBM Provided

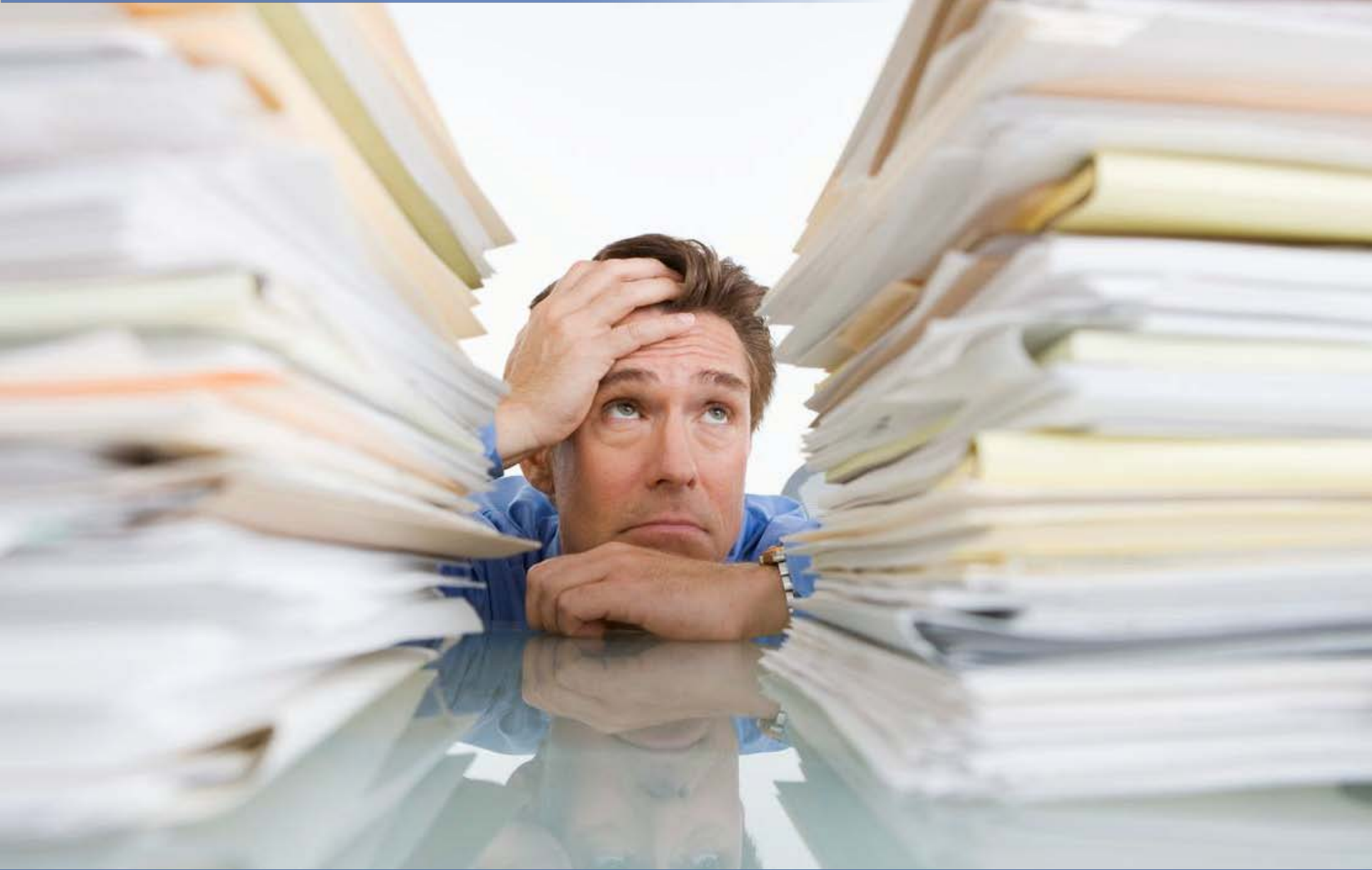
- Guidance with finding the right tooling approach
- Requirements Management Guide
- Requisite Pro Templates
- Establishing artifacts as outlines



# Tooling – Traceability



# Updating the templates



# Training

## Provided by IBM

- Provide Use Case training for business BA's
- Requisite Pro Training for Practice BA's

## Provided by NAB

- Joined the Solution Design mentoring sessions to learn Rational Software Modeler
- Looking to introduce lunch time informal sessions to uplift skills



SDLC

Project  
Management

Methodology



# The Challenges

# The Highs and Lows of Change Management



# Know your stakeholders

- Not everyone will initially share the vision
- Some will require more reassurance
- Some will not understand the need for change
- Some will fully embrace the program and become great change agents

# Corporate Structures



# Corporate Structures

**Business  
units**

**Technology  
units**

**Executive  
Stakeholders**

# Building BA engagement



***When you change your requirements process, you impact all teams within the SDLC.***



**Don't stretch your change teams**



# The Benefits

# Benefits

- Faster time to market or completion
- Reduction in overall project costs
- Greater consistency and quality
- Unification of people and processes

*Don't expect payback  
on the first project,  
invest in solid  
foundations.*

# The Future



**The Journey Continues**

# In Conclusion

- Change is the only constant
- Invest in team development
- Use the right tools
- Continually measure the benefits
- Engage your stakeholders



Questions?

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