



Banking Customer

Top US Bank takes control of Strategic Portfolios through **iServer**



Executive Summary:

- A major US bank needed to take control of their technology landscape and meet their needs for continued digital evolution
- The bank needed a product with a central repository, that was easy to use and collaborate with and could support their move to containerization
- They chose iServer, and have seen great results over the past 18 months, realizing \$8m of savings in the first six months of 2021
- Lead times for EA work have been slashed from months to days, and the flexibility of the tool is helping the bank to meet their wide range of demands

The bank has been using iServer to power its enterprise architecture (EA) for 18 months, helping the firm to meet their digital transformation goals, take control of their application portfolio, and embed cybersecurity throughout the organization.



The Challenges

Massive Scale of Operations

The sheer scale of the bank's operations highlights the problem they faced. At any one time, the bank could have 500 programs, 7000 projects and 1200 potential users, with budgets in the region of \$3 - \$3.5 Billion.

The bank underpins a huge number of global transactions, not just in America. They needed applications that are secure and resilient, and they need a lot of them.

At the same time, with so many projects it is easy for people to start re-inventing the wheel and for duplicate systems and processes to proliferate. The Bank needed to be able to focus their vast development resources and deliver a lean, effective application portfolio.



The Challenges

Poor Usability of Existing EA

The bank had had enterprise architecture in the past, but it was an unwieldy system relying on extensive documentation, rather than a robust central repository. Doing any kind of project management meant opening up thousands of documents to find the relevant information. Keeping information updated meant manually performing hundreds of surveys.

Ensuring EA can engage the business

When looking at the development of their EA, the business also wanted to ensure that EA was fully involved at the ground level, and not “Ivory Tower” EA that was isolated from the important parts of the bank. The architects wanted to be able to talk directly with developers and project managers and get involved in their requirements, which meant they needed a consistent language – how to talk about requirements or how to model and design applications.

Support for Containerization

On a more technical level, one design aspect that the bank have pushed heavily is containerization, as they move from reliance from virtual machines. Developing applications in containers helps to improve resiliency and increase the amount of time that key software goes incident free – a key metric for the bank.



The Results

Lead Times Reduced from Months to Days

The bank started to use iServer a year and a half ago, and it's had big impacts on their project management and portfolio management. Instead of scouring thousands of documents or sending out hundreds of surveys to get the required information, their architects can simply pull it straight from iServer, turning a month long process into one that takes just a few days.

Consistency Across the Development Landscape

iServer's out of box TOGAF solution allowed the bank to hit the ground running, while its flexibility and configurability made tailoring the TOGAF standard for the bank a straightforward exercise. This customized metamodel underpins much of their development.

Their metamodel helps to ensure consistency in language across applications, and prevents redundant or wasted development. iServer is used to manage the metamodel and ensure that people are sticking to it.

Containerization has also been greatly helped by EA, given the bank portable applications that can run anywhere.





Millions of IT Dollars Saved Each Year

Perhaps most impressive have been the delivered through iServer's superior visibility and rationalization capabilities. For the first half of 2021, the bank saved around \$8m thanks to their EA efforts.

There is more to come as well; every summer, the bank run a portfolio optimization exercise to rationalize unnecessary applications, which has been supercharged by iServer. The architecture team are particularly interested in finding opportunities for shared services: finding and developing applications that can be used across a range of functions instead of requiring multiple apps.

Impact Analysis and Security to Further Enhance iServer Offering

Going forwards, iServer will be used for Business Impact Analysis, to support PMOs and portfolio executives. The Chief Resiliency officer makes use of iServer's cybersecurity functions, and iServer is already playing a role in security by ensuring that security is baked into the core design priorities of every development.

Why iServer?

The Flexibility to Meet Every Need

Since being implemented, the bank has found that iServer could do everything that they need with a minimum of fuss. Particular praise was given to the flexibility of iServer. One senior architect commented that:

“It’s the flexibility to be able to design whatever we want. There are no limitations in iServer. We can express whatever we want, and even do it quickly. We decide we want to make a change, then we can just throw it in the tool. iServer is really fast”

Extensibility Powers Automation and High Level Work

iServer’s extensibility, in particular through the API engine, is helping to power more advanced uses at the bank, especially in automation. More and more aspects of their work are being automated, which frees up the architects to pursue higher level and higher value work, as well as to integrate other tools into iServer. They are making wide use of a set of iServer dashboards, as well as the iServer portal.

Adoption of iServer has become widespread outside of the architecture team, with developers able to discuss diagrams and models in a common language. The spread of diagrammatic understanding really impressed the architecture team, with developers who hadn’t even met the architects speaking the same language.

Why iServer?

Portfolio Management Transforms the Application Landscape

The Portfolio management capabilities were highly praised. As mentioned above, the bank have already saved millions through rationalization of unneeded applications. iServer measures their entire portfolio, helping to see what services cut across the business, and how much of the portfolio is actually being spent on business and functional requirements, vs non functional requirements.

iServer Allows the Bank to Understand Data Flows

Data Lineage is another area in which iServer has proven its capabilities. The bank has only started to address the challenges it faces with understanding data lineage, but iServer's ability to monitor data flows and identify relationships has been invaluable. They have been able to identify inorganic data lineages and start to rationalize unnecessary functions based on this.

Outstanding Continued Support from Orbus

Finally, the continued support and consultancy services offered by Orbus Software have been highly valuable to the bank. They have many ambitious plans for iServer, making extensive use of Orbus Software's expertise to enable additional customizations and automations.

"We're having a good experience with Orbus. I can't find anyone in the world doing what we're doing... our ambitions are challenging both ourselves and Orbus but the support and consulting they provide are excellent."

Senior Architect at the Bank





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