UX in IT Consulting

Внедрение методов User Experience Engineering в IT-консалтинге

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Why UX Matter?

- Requirement for today's competitive IT products & processes

Keane Snapshot

Founded in 1965; headquartered in Boston, MA	
Geographic Presence	**US, Canada, UK, Australia, and India**
Worldwide Strength	**14,000+ employees; all full-time professionals**
Global Delivery Centers	**Across India, Canada, UK and Australia**
Annual Revenues	**$956 Million (2005)**
Publicly Traded	**NYSE (KEA) /Owned by Citi Group**
Security	**BS2700 1:2005 security standards – highest in the world**

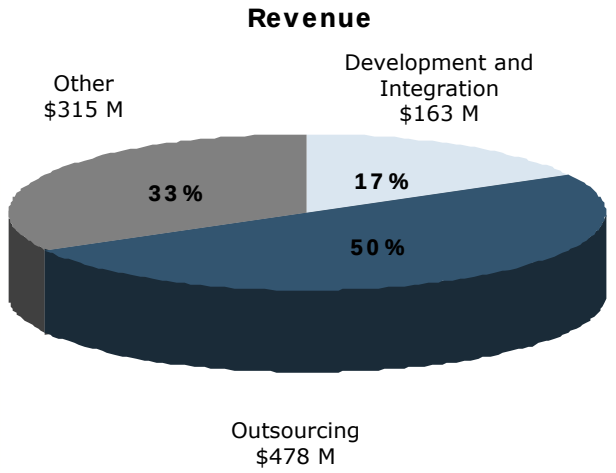
Keane works with Global 2000 companies to create verticalized business solutions

Heritage

- **Delivery excellence and standards**
- **Project/Program Management**
- **Strong client relationships**
- **40 years of experience**
- **Offshore delivery since 1982**

Keane Today

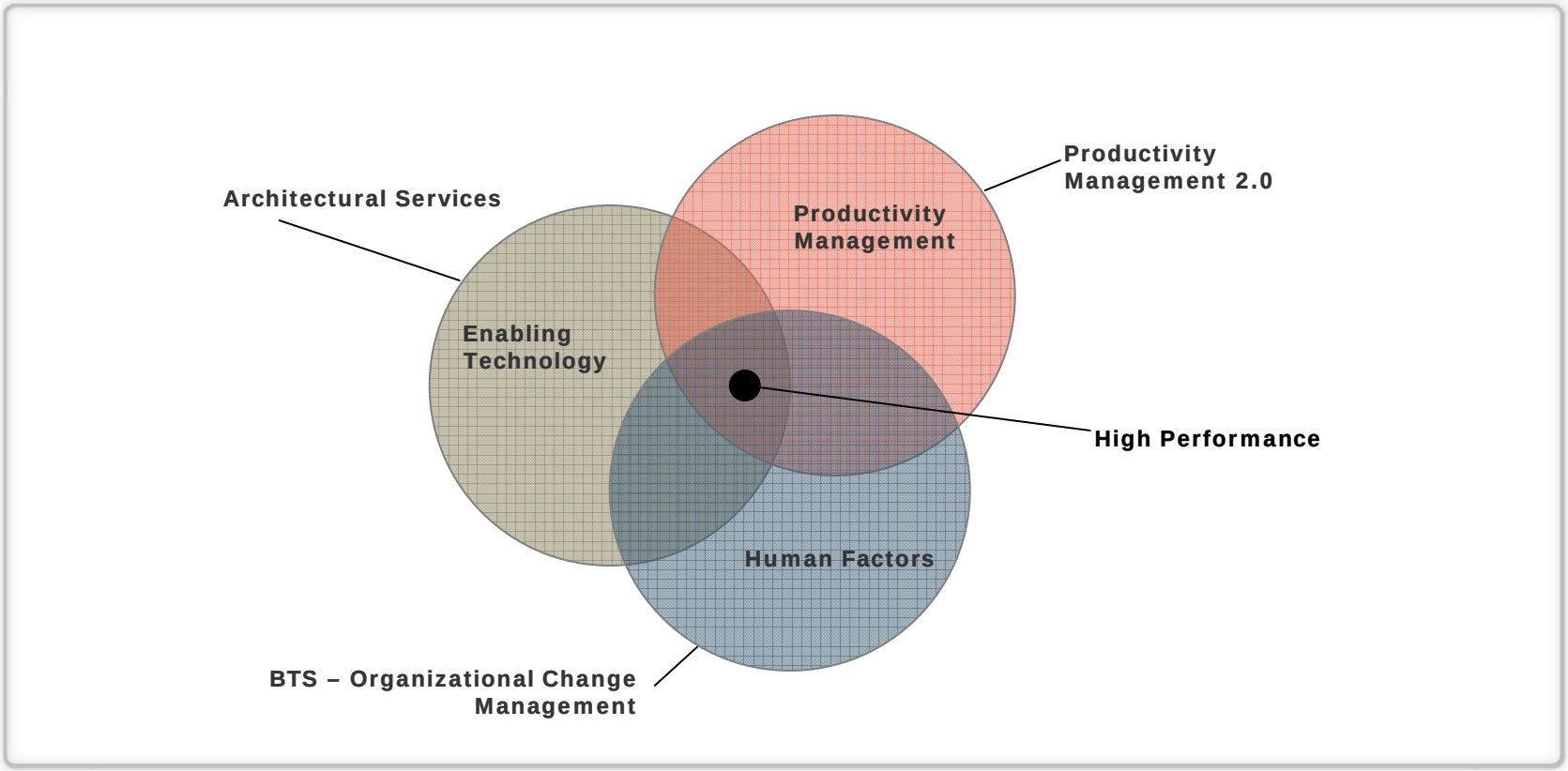
- **Enabling transformation**
- **Innovation, thought leadership**
- **Locally managed, vertically focused**
- **Global model for delivering results**
  - Services
  - Industry expertise
  - Transformational solutions
  - Onsite, offsite, nearshore, offshore



Select Financial Services Clients

Rabobank

KEANE: Integration of Capabilities



The power is in the integration and balance of three capabilities.

About Keane Architecture Services

1 Who we are

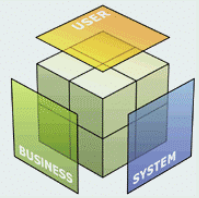
Overview

Keane Architecture Services offers technology strategy and delivers leading-edge solutions to companies across industries.

Service Offerings

- Business Intelligence Solutions
- Enterprise Architecture and Strategy
- Enterprise Info Management
- Emerging Technologies
- Business Process Management
- Collaboration Spaces and Technologies
- Assessments (UI, Technology, Architecture)
- Vendor Evaluation and Management
- Application Lifecycle Management

2 Approach



Business Focus

- Define metrics for success
- Align business and technology strategies
- Business goals drive integration strategy
- Define implementation options
- Prioritize functionality
- Create a phased approach

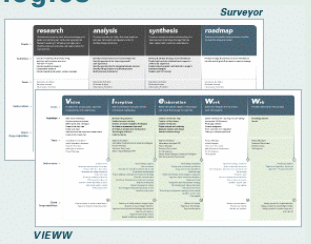
User Focus

- Learn about users and design for them
- Experience framed around task completion
- Convey the appropriate message
- Intuitive tasks + compelling content = usability
- Form follows function

System Focus

- Enterprise-wide tech stds
- Application architecture drives technology choice
- N-tier layered design principles
- Integration strategy within context of industry

3 Methodologies



surveyor

DEFINE: Understand enterprise-wide business strategy
EVOLVE: Align business, user, and system goals. Create an enterprise-wide strategy
MAP: Achievable implementation timeline

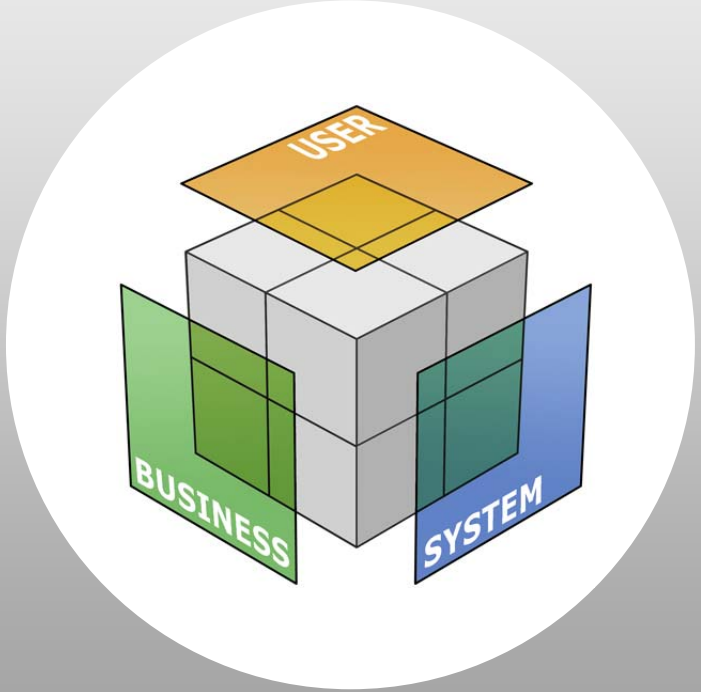
viewW

Vision: Project goals, business requirements, initial scope
Inception: Information structure, system architecture
Elaboration: Refine project details, create final design
Work: Build and integrate front- and back-end systems
Web: Transfer ownership of the project

Surveyor™

Keane's methodology for developing
An architecture strategy is called
'Surveyor'

- A **customizable** process that is highly tailored to the specific engagement
- A **holistic** approach for aligning business and technology direction that includes business, user and system aspects
- Utilizes a client-focused strategic **partnering** methodology
- Focus on **agility, flexibility and reusability** of architectural components to support business processes



Surveyor is a methodology that aligns business goals, user needs, and technology capabilities to deliver an enterprise architecture strategy

A Typical Consulting Team

Project Manager
- Primary contact, manages scope, risk, status reporting
- Considers impact of change on business process
- Contributes to the development and validation of strategy and recommendations

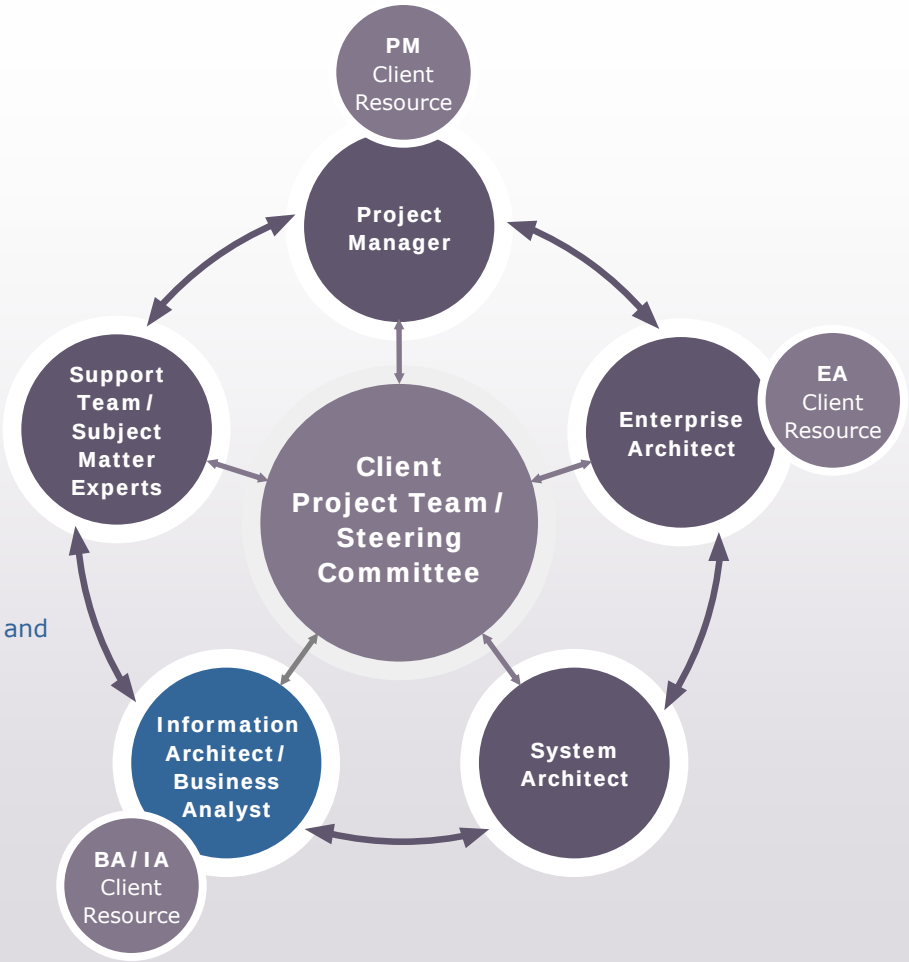
Enterprise Architect
- Develops a thorough understanding of and validates/assesses all strategy from architecture and business perspectives
- Understands and prioritizes business and system requirements
- Develops technology options to align technology strategy with business vision/strategy

System Architect
- Develops a thorough understanding of current system and data architectures
- Creates overall system architecture to support business strategies

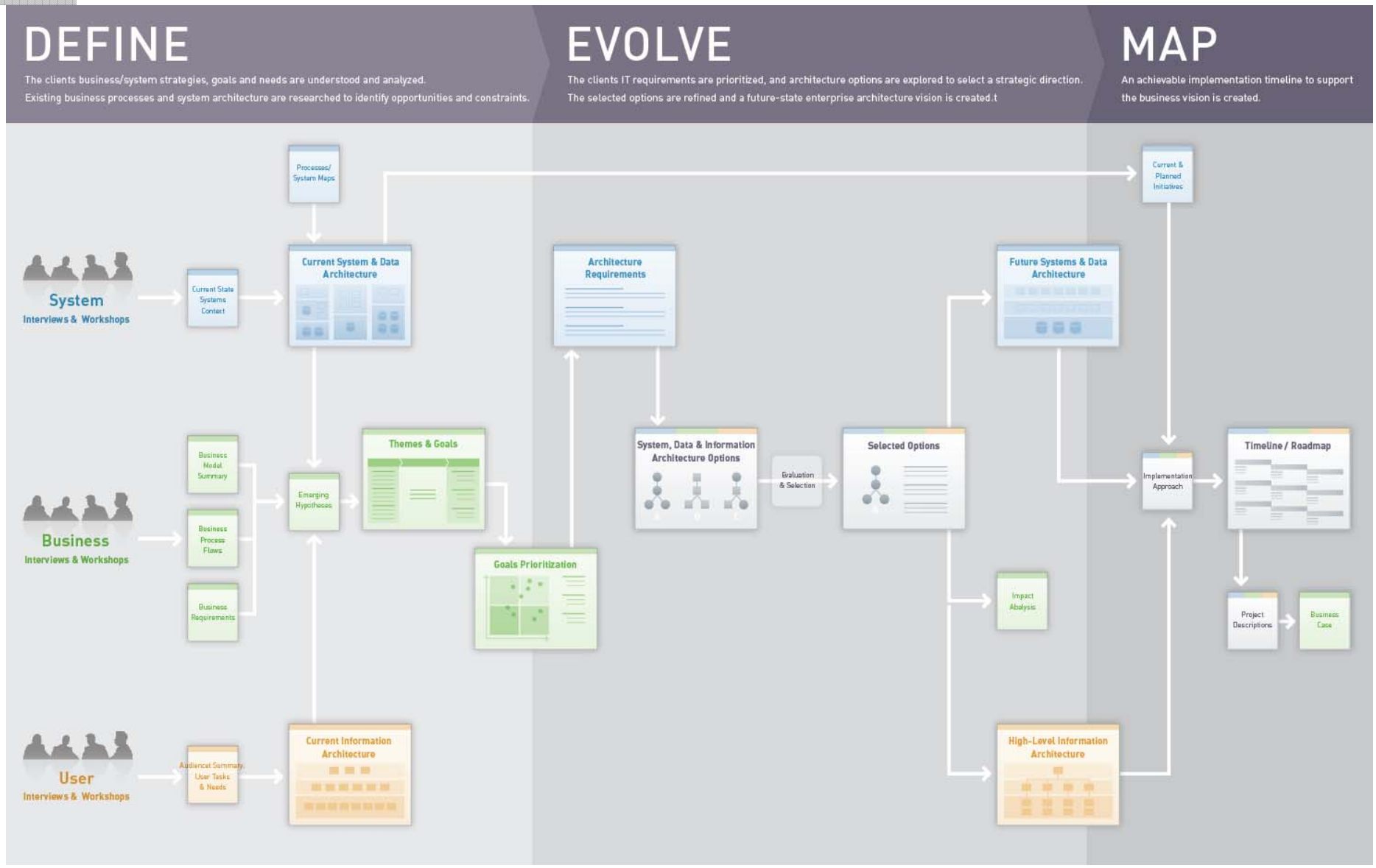
Information Architect
- Understands and prioritizes business and user goals through workshops and interviews

Business Analyst
- Understands, analyzes, validates and documents business processes

Support Team / Subject Matter Experts
- Considers impact of change on business process
- Contribute to the development and validation of strategy and recommendations



Surveyor™ Process



Surveyor™ Preparation Phase: PLAN

During the PLAN phase, the necessary preparations are made for the assignment kick-off with the client.

Activities

- Discuss and confirm project scope and focus with client business sponsor
- Request and collect documentation
- Identify stakeholders and interview groupings
- Schedule interviews and workshops
- Create interview agendas and refine questionnaires

Deliverables

- Business, User and System Interview Questionnaires (internal deliverable)
- Project Plan

Audience Summary

	Sales & Customer Relationship Management	Underwriting & Approval	Servicing	Executive (Entity & HQ)
Key Activities	• Generating leads/sales • Structuring and completing loan application and supporting documentation • Customer relationship management	• Credit scoring/analysis of applicants • Underwriting • Loan approval	• Back-end loan processing • Loan monitoring • Loan balancing • Data entry • Report creation • Customer support	• Strategic planning • Providing direction • Monitoring and reporting

Key Needs	• Understand client's relationship with Entity 1
	• Understand client's risk and profitability
	• Understand client's needs
	• Easy handoffs between entities
	• Single data entry between entities and within entities
		• Integrated underwriting tools
		• "Common" set of underwriting tools
		• Understanding of client's relationship with Entity 1
		• Single data entry (no duplicate entry) between and within entities
		• Facilitated handoffs between entities
			• Streamlined process
			• Minimized handoffs
			• Single data entry
			• Workflow automation
				• Understand client needs
				• Understand cross-entity needs and activities
				• Timely and accurate reporting capabilities
				  • Entity performance
				  • Parent reporting
				  • Fed reporting
				• Key performance metrics

Shows users grouped based on similarity in activities performed (irrespective of business unit/ department they belong to). Typically includes a summary of activities, key needs and issues faced for each group.

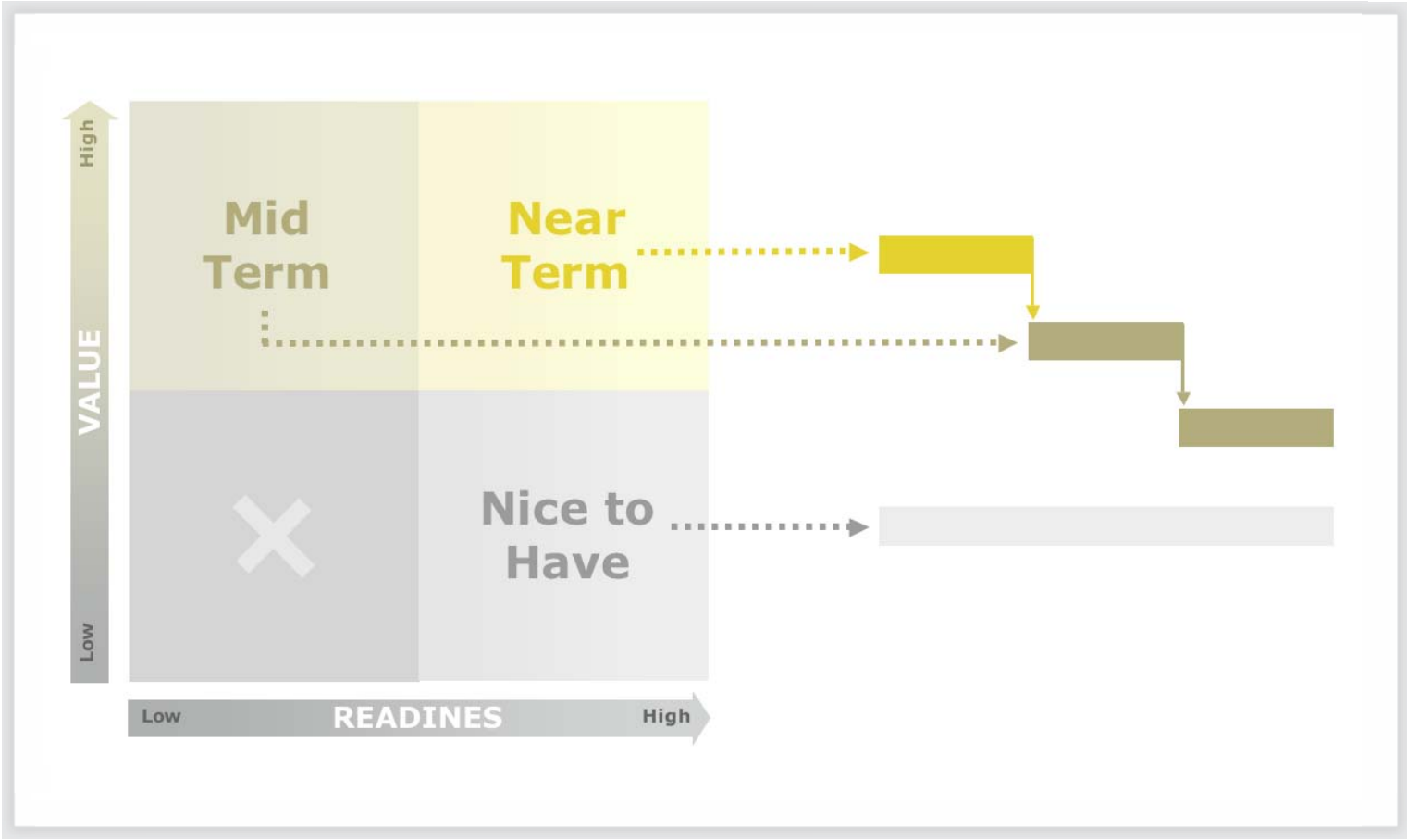
Themes & Goals

Observations	Theme	Goals

• Multiple solutions for loan origination and servicing
  ◦ Regulatory and client requirements often dictate choice
• Multiple vendors
• Loans double-booked due to lack of systems interfaces
• Multiple platforms and hosting models
• Multiple reporting mechanisms and tools
• Multiple loan accounting methods at ABC and XYZ (interest accrual)
• Multiple credit scoring and analysis methods and tools
• Varying methods, templates for document preparation
• Need to migrate legacy ABC data to XYZ
	1 Standardize origination and servicing for each loan product across entities	• Standardize processes within and across entities by loan offering
		• Enable a common architecture framework across entities
		  ◦ Standardize vendors / solutions based on entity needs
		  ◦ Improve usability
		• Leverage existing technology investments to avoid developing redundant solutions
		• Standardize and automate credit scoring and analysis
		• Enable timely, accurate, and consistent sharing and reporting of loan information
		  ◦ Across & within entities

Common themes or patterns derived from observations. Each theme or pattern has high-level recommendations for addressing the issue identified. These recommendations are the 'goals' driving the future state vision.

Goal Prioritization Framework



Surveyor™ Phase 3: MAP

During the MAP phase, an achievable implementation timeline to support the business vision is created.

Activities

- Identify new projects
- Review ongoing initiatives/ projects relative to strategic direction
- Integrate new project list with relevant existing and planned project lists
- Identify dependencies and high level effort estimates for all projects
- Create high-level business case for key projects (optional)
- Produce business, user, and systems work products
- Craft and present Map Phase Checkpoint Deck

Deliverables

- High-level implementation/transition timeline
- Project descriptions with dependencies and high-level effort estimates
- Business case/ cost-benefit analysis

Keane's VIEWW Methodology

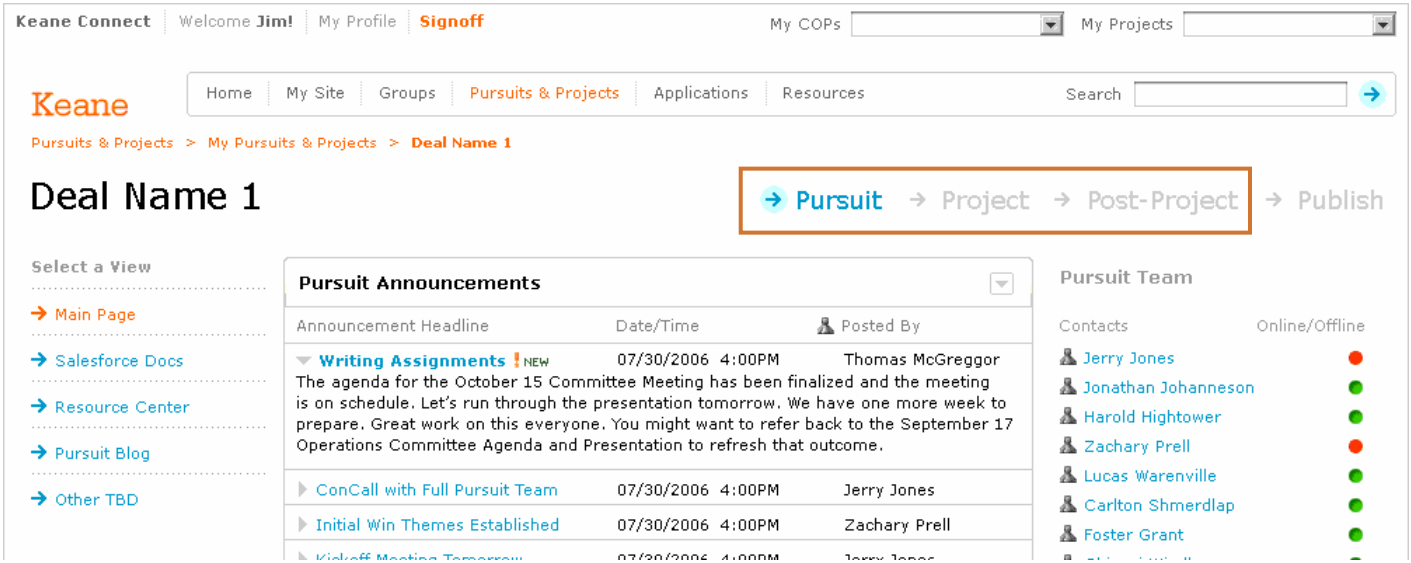
- Keane will employ its VIEWW development methodology to drive the development process. VIEWW is a proven methodology to implement a software solution to a business challenge:

VISION	INCEPTION	ELABORATION	WORK	WEB
Define project goals, understand current state, and validate requirements.	**Refine requirements and create systems, business, and information architecture models.**	**Refine solution design to detailed design specifications and implementation standards.**	**Develop solution components, integrate front end and back end, and fully test.**	**Deploy the solution into production. Transition ownership to support and maintenance teams.**
Activities	***Activities***	***Activities***	***Activities***	***Activities***
Gather and review data and system documents *Review functional requirements* *Validate planned dashboard metrics* *Develop non-functional requirements* *Develop user requirements* *Interview business, user, and system stakeholders to understand current state and refine requirements* *Consider architecture options and patterns*	*Create high-level user experience design* *Develop use cases* *Architecture workshops to validate ETL, EDW, reporting, and system approach* *Define physical architecture, size hardware, and develop deployment strategy* *Develop QA Strategy and plan*	*Refine design* *ETL* *object models for custom code and framework* *data model for application, data mart, and EDW* *security specifications* *Detailed deployment plan*	*Environment Setup* *Configuration of report repository* *Security Setup* *Web, component, ETL, and database development* *Report Development* *Backup Implementation* *Solution System and Integration Testing* *UAT/QA Preparation and Support* *Performance Testing and Tuning*	*Transition Maintenance and Support* *Train-the-Trainer Training* *Technical Operations Training* *Publish & Review User Manual and Quick Ref Guide*

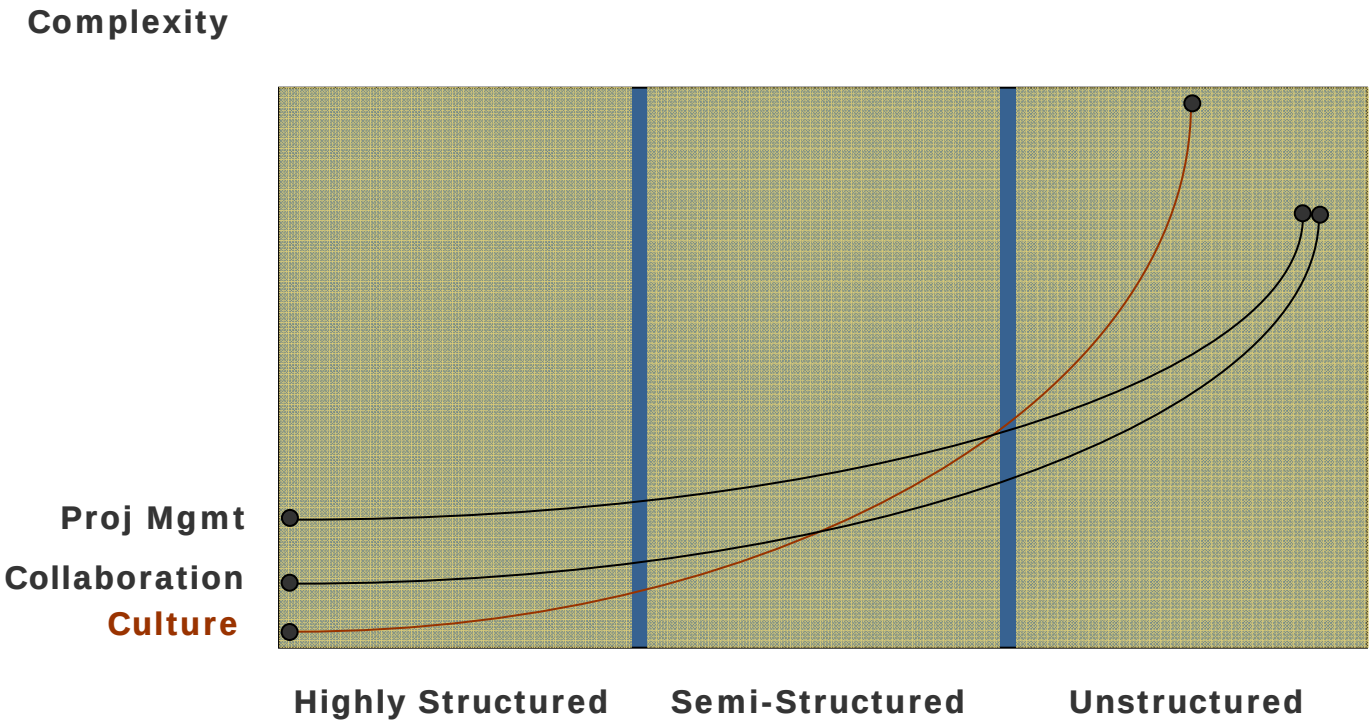
Business Process Collaboration Platform

Customer  Keane

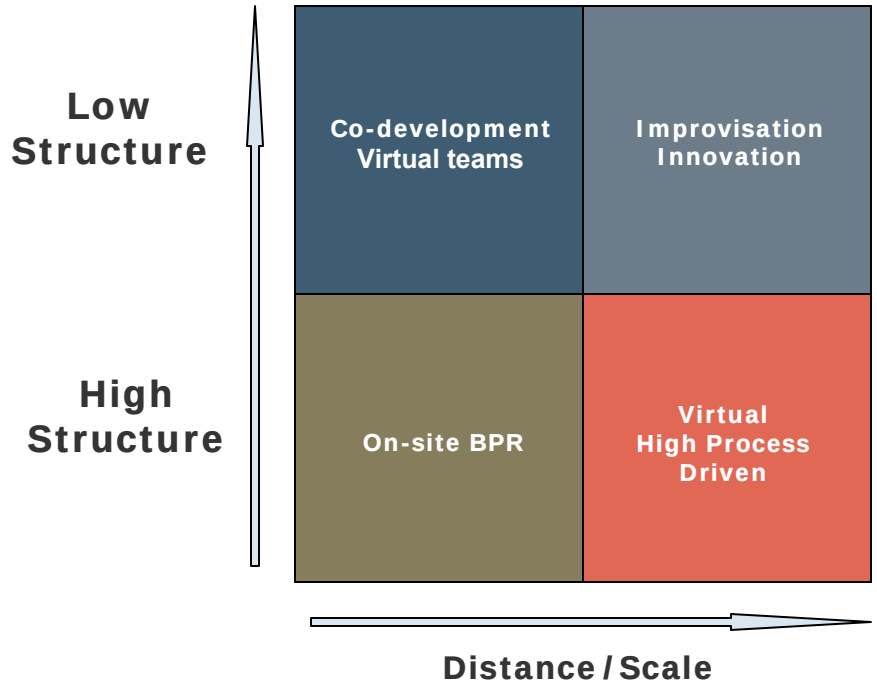
Integrated collaboration across Keane's Macro-level Information Value Chain



Complexity of Work



Structure of Work



Once you enter the world of less structured work you bring collaboration and culture to the forefront

What can collaboration help with?

Based on information gained during the user interviews, the collaboration effort can result in increased productivity if the following issues are addressed.

Information Availability

Give people what they need when they need it in a format that is scalable

Provide users with a place and tools to work with a global team

Technology

Keep pace with changing technology that business requires

Automation eliminates wasteful spending on remote applications

Process & Workflow

Seamless insertion of collaboration into current task flow

Clear vision of collaboration process from management

Culture

Embrace a culture that pushes efficiency and drives revenue

Encourage global networks of information

Collaboration KPI Assessment Methodology

A phased assessment methodology with integrated KPIs for organizational, process and infrastructure analysis and monitoring

1	2	3	4
Maturity Assessment	**KPI Model**	**KPIs Analysis**	**Reporting & Monitoring**
Current state **qualitative** assessment of enterprise collaboration capabilities and maturity.	Identification of adequate collaboration level and development of **KPIs** based on business requirements.	Identification of problem areas and needs evaluation based on **quantitative** and **qualitative** KPIs assessment	Short and long-term monitoring of KPIs to enable business intelligence reporting and analysis
•Technology readiness •Process maturity •Organizational readiness	•Business metric requirements •Collaboration requirements •Process-specific collaboration KPIs •Short-term benefits	•Collaboration activities measures •Process congruence •Social network assessment •Perceived values •Needs evaluation	•Alignment with ongoing and future initiatives •Technology strategy •Business intelligence •Organizational change •Process evolution •Long-term benefits

KPIs Assessment Methods & Components

Qualitative Measures

How: Surveys & interviews

What: Perceived values of

- Quality
- Maturity
- Adequacy
- Cohesiveness
- Problem areas
- Needs, and etc.

Quantitative Measures

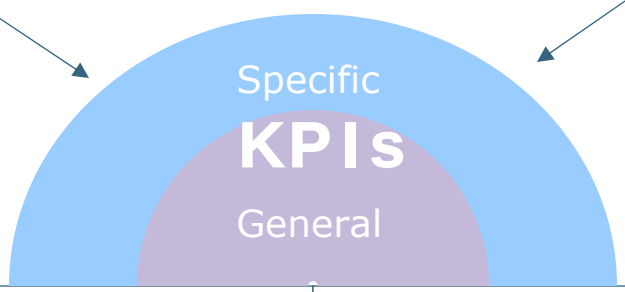
How: Activity logs & File usage

What: Actual performance measures of

- Collaboration activities
- Information reuse and sharing
- Individual & team productivity
- Process congruence
- Interruption
- Social networks

Top-Down

Bottom-Up



Process & Industry Specific

Specific to a particular process constraints or business requirements, e.g., compliance assessment

General

Related to common collaboration activities defined by the infrastructure maturity level

Collaboration Maturity Levels

Maturity Level	Strategic Inflection Point	Critical Behaviors	Effective Span
5. Workplace-Centric	Workplace virtualization and pervasive connectivity extend collaboration efforts to include devices (tablets) and networking (Wi-Fi); unified communications (IP telephony).	Integration with KM and HCM strategies	Internal/ external
4. Process-centric	Collaboration viewed as integrated service within processes (e.g., customer relationship management). Internal and external collaboration standardized across common knowledge worker infrastructure. Collaborative components delivered "contextually" to meet user needs.	Contextual collaboration	Internal/ external
3. Enterprise-based	Centralized governance and standardization from tools to development environment. Common use policies. Collaboration becomes part of enterprise architecture efforts. External collaboration remains a stovepipe.	Knowledge worker infrastructure	Internal
2. Business-unit-driven	Decisions made for consistency at a department level; use of outsourced services (e.g., WebEx); collaboration handled via a "toolbox" approach.	Tool-centric	Internal
1. Workgroup	Localized teams, personal productivity, primarily anchored around e-mail and file servers.	Ad hoc, reactionary	Internal

Source: Gartner research

- Every collaboration maturity level presumes distinct types of dependencies between organizational units, business process, and IT requirements resulting in:
  - different baseline levels
  - a unique set of collaboration KPIs

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