Case Study:
Successful IT Asset Implementation at Bendigo & Adelaide Bank

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Craig Barbakow – IBM
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Bendigoand
AdelaideBank

Today's Agenda

- **Bendigo & Adelaide Bank Profile**

- **Benefits of IT Asset Management and Software License Compliance Solution**

- **Integrated Project Team**

- **Collaborative Project Approach**

- **Solution Overview**

- **Lessons Learned**

- **Demonstration**

- **Q&A**

Bendigo and Adelaide Bank Profile

- Bendigo Bank formed 1858, Adelaide Bank formed 1900 and merged in 2007.

- Head Office in Bendigo, major offices in Adelaide, and Melbourne.

- Innovative community focussed business model.

- Objective: To be Australia's number one customer connected Bank.

- National Retail Branch Network (442 Branches and 99 agencies).

- Wholesale mortgage business.

  - Margin lending.

  - Lending via partners / brokers.

Bendigo and Adelaide Bank - IT Profile

- Data Centres   2
- Mainframes   2
- Batch Jobs   4500
- Servers
  - Physical   400
  - Virtual   500
- Desktops / Laptops   7000
- Technology Services Staff   175

- IT Help Desk
  - Staff   18
 - Calls per day   400

- No Shift Operators – "Lights Out" Data Centre

Benefits of IT Asset Management and Software License Compliance Solution…

- Full asset lifecycle management
- Better ability to locate assets
  - Avoid costs when unable to return leased assets to vendors
  - Avoid cost associated with unused inventory
- Optimise the provisioning of SW licenses
- Centralised and integrated asset, contract and procurement system to manage and report on critical data required to run the business
- Unified process for various stakeholders that is enhanced by tool capability
  - Vendors / 3rd Parties
  - IT Finance
  - Procurement
  - Asset Management
  - Service Desk
- Remove the need to manually link between IT Configuration, Procurement, Contract and Asset Management using emails and spreadsheets, etc.

Solution Overview

- **TAMIT creates a single platform that allows various stakeholders to store, manage and report on their data from one integrated system.**
  - **HW Assets**
  - **SW Assets / SW Licenses**
  - **Procurement (P.O.'s)**
  - **Contracts**
  - **Company data**
  - **Pricing**
  - **Person data**

- **Significantly improves data integrity – configuration information, purchase orders, assets and contracts are all linked to each other.**

- **TAMIT business rules ensures data created by one business unit does not require validation by the other. Do not need to waste time validating information from third party vendors.**

- **Active Directory integration**

- **TAMIT-TCM (Reference Model) -TLCM (SW License Compliance) integration**
  - **Reconciliation**
  - **Deployed vs. Authorised**

- **TAMIT provide the foundation for expansion to other IT Asset Management and Service Management processes in the future.**

Collaborative Integrated Project Team
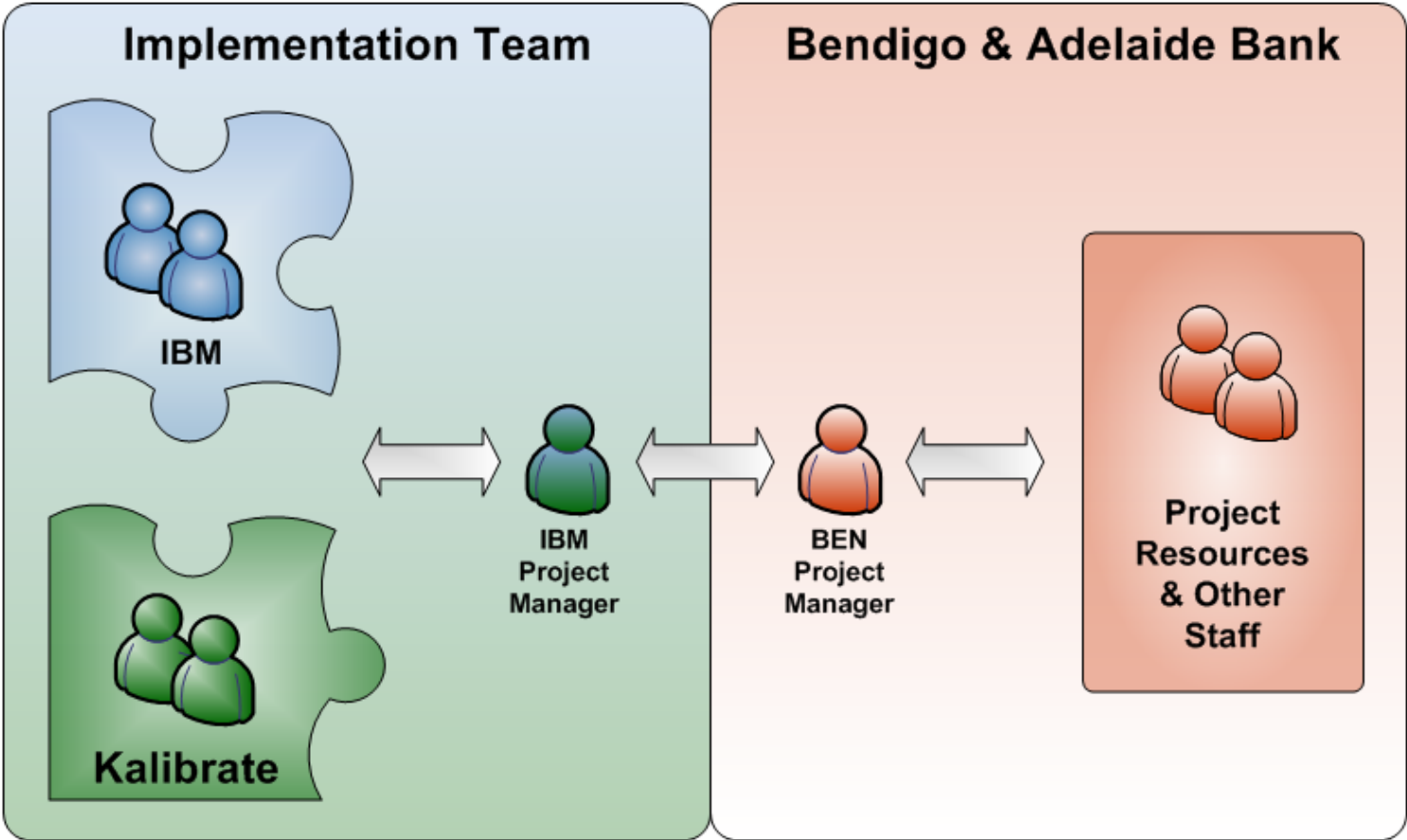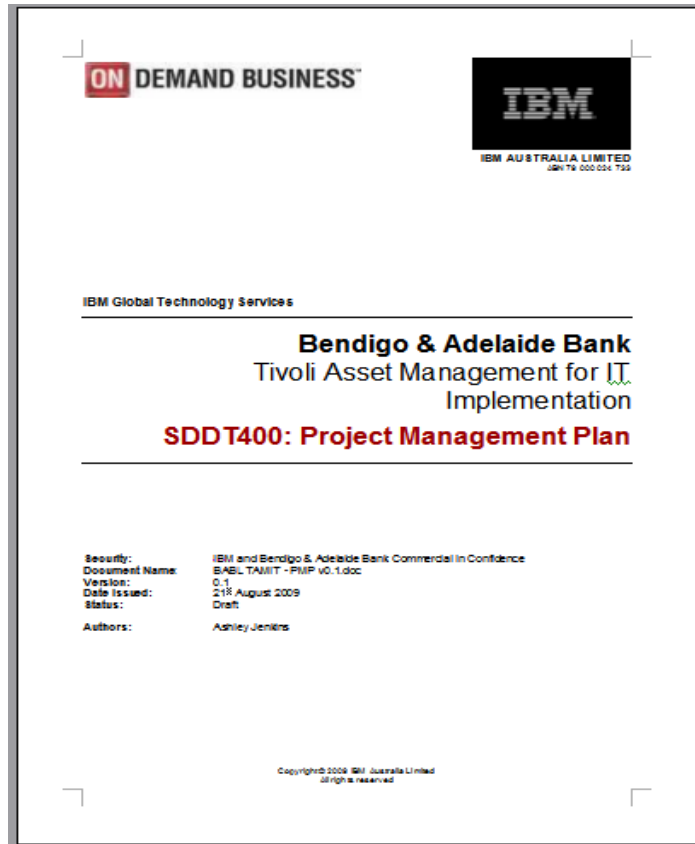
Collaborative Integrated Core Project Team

Bendigo Bank

- Darren Lewis – Project Sponsor
- Derek Flanagan – System Management
- Tony Watkins – Project Manager
- Jillian Windust – Procurement Manager
- Ty McCormick – Asset Manager
- Tim King – SW License Compliance

IBM Integrated Team

- Ashley Jenkins – IBM Project Manager
- Craig Barbakow – IBM Process Consultant
- Mike Young – Kalibrate Technical Lead
- Aneesh Joseph – Kalibrate TAMIT Technical Specialist

Project Management

ON DEMAND BUSINESS™

IBM

IBM AUSTRALIA LIMITED
ABN 79 000 024 733

IBM Global Technology Services

Bendigo & Adelaide Bank
Tivoli Asset Management for IT
Implementation
SDDT400: Project Management Plan

Security: IBM and Bendigo & Adelaide Bank Commercial In Confidence
Document Name: BABL TAMIT - PMP v0.1.doc
Version: 0.1
Date Issued: 21st August 2009
Status: Draft

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Project Overview
Detailed Work Schedules
- Milestone Schedule
- Progress Tracking

Environment & Configuration Management
Organisation & People
- Organisation Structure
- Resourcing & Roles
- Resource modelling across project schedule
- Managing Stakeholder communications

Risk Management
Financial Management
Quality Management
IBM Project Assurance Reviews
- Quality Control for Documentation Outputs
- Quality Control for Technical Outputs

Project Management Controls
Change Management
Issue Management
Dependency Management
Reporting & Reviewing

Project Approach

Phase 1 – Process Consulting & Design

- Asset Management functional requirements & process document
- Procurement & Contracts Management functional requirements & process document
- Solution Design documents
- Test Strategy document
- Education recommendations document

Phase 2 – TAMIT Implementation

- Configuration and customisation
- Operations Management document
- Testing documentation
- TLCM integration configuration document
- Production System Verification document

Phase 3 – Integration

- Integration to external systems
  - Service Desk
  - Active Directory
  - TLCM
- Configuration document
- Testing documentation

Phase 4 – Training & Support

- Training materials
- Education feedback forms
- Go live support defect form
- Post implementation support defect form
- Post Implementation Review (PIR) report document

Engagement Management

- Project Management Plan
- Project Schedule
- Weekly Timesheets
- Weekly Reports

Project Plan

	ⓘ	Task Name	Duration	Start	Finish
1	▦	– Build Environments	28 days	Fri 28/08/09	Tue 6/10/09
2	▦	Mobilisation	0 days	Fri 28/08/09	Fri 28/08/09
3	▦	Install Config Questions (SMTP, adm email,Link Docs	1 day	Mon 31/08/09	Mon 31/08/09
4	▦	System Architecture Document(Reqmnts for DB, AD	1 day	Mon 31/08/09	Mon 31/08/09
5	▦	Delivery of Environment for Install	0 days	Mon 14/09/09	Mon 14/09/09
6	▦	Delivery of AD Env	0 days	Mon 14/09/09	Mon 14/09/09
7	▦	TAMIT Install (Link Docs, JMS etc)	10 days	Mon 21/09/09	Fri 2/10/09
8	▦	Login Signed Off	0 days	Mon 5/10/09	Mon 5/10/09
9	▦	Start Ops Management Doc	2 days	Mon 5/10/09	Tue 6/10/09
10	▦	Build Development VM for Consultants laptops	3 days	Mon 21/09/09	Wed 23/09/09
11	▦	– Requiremnts Gathering by IBM with Kal Involve as :	20 days	Mon 14/09/09	Mon 12/10/09
12	▦	Process Consulting By Craig B	15 days	Mon 14/09/09	Fri 2/10/09
13	▦	Design Support for Process consulting_1	3 days	Mon 14/09/09	Wed 16/09/09
14	▦	Design Support for Process Consulting_2	5 days	Mon 28/09/09	Fri 2/10/09
15	▦	Requirements Gathering for CAUSD	5 days	Mon 28/09/09	Fri 2/10/09
16	▦	RS Signed Off	0 days	Mon 12/10/09	Mon 12/10/09
17	▦	CA USD RS Sign Off	0 days	Mon 12/10/09	Mon 12/10/09
18	▦	– Design	10 days	Mon 12/10/09	Mon 26/10/09
19	▦	Design Spec	7 days	Mon 12/10/09	Tue 20/10/09
20	▦	Design Spec for CAUSD	3 days	Mon 12/10/09	Wed 14/10/09
21	▦	Locations Load Template	1 day	Thu 15/10/09	Thu 15/10/09
22	▦	Security Matrix Template	1 day	Fri 16/10/09	Fri 16/10/09
23	▦	Asset Classes / Specs Template	1 day	Mon 19/10/09	Mon 19/10/09
24	▦	Asset Attributes Load Template	1 day	Tue 20/10/09	Tue 20/10/09
25	▦	DS Signed Off	0 days	Mon 26/10/09	Mon 26/10/09
26	▦	– Base Data Set-up	4 days	Mon 26/10/09	Thu 29/10/09
27	▦	BABL TAMIT System Admin Avail	0 days	Mon 26/10/09	Mon 26/10/09
28	▦	Create Site, Org, Sets & Currency	1 day	Tue 27/10/09	Tue 27/10/09
29	▦	Configure Security	1 day	Wed 28/10/09	Wed 28/10/09
30	▦	Delivery of Locations Data	0 days	Mon 26/10/09	Mon 26/10/09
31	▦	Load Locations Data	2 days	Tue 27/10/09	Wed 28/10/09
32	▦	Update Ops Management Doc	1 day	Thu 29/10/09	Thu 29/10/09
33	▦	– Configure inline with DS	16 days	Thu 29/10/09	Thu 19/11/09
34	▦	DB Config	2 days	Thu 29/10/09	Fri 30/10/09

Project Reporting

- **Project status**

- **Focus activities for last week and next week**

- **Key decisions**

- **Schedule tracking**

- **Financial tracking**

- **Issues**

- **Dependencies**

- **Risks**

- **Lessons learned**

TAMIT Project – High Level Timeline Planning

Bendigoand **Adelaide**Bank

Month	Aug-09				Sep-09				Oct-09				Nov-09				Dec-09				Jan-10			
Week	Wk1	Wk2	Wk3	Wk4	Wk1	Wk2	Wk3	Wk4	Wk1	Wk2	Wk3	Wk4	Wk1	Wk2	Wk3	Wk4	Wk1	Wk2	Wk3	Wk4	Wk1	Wk2	Wk3	Wk4
Leave			TM			RS		TW				TW										JW		
Phase1						1	1	1	1	1	1	1												
Phase2									2	2	2	2	2	2	2									
Phase3														3	3	3	3				3			
Phase4																					4	4	4	

(Dec-09: Bank Christmas Closure)

TEST: VM Server Built

TEST: VM Server Ready
**PROD:** Hardware Arrives
IBM: Staff Onsite

PROD: Server Ready

| Phase	Phase 1: Process Consulting	Phase 2: TAMIT Implementation	Phase 3: Interface to CA USD	Phase 4: Mentoring Workshop & Support
Work Packets	• Asset Management Review • Contracts & Procurement Management Process Review • Design & Document Solution • Education Recommendations	• TAMIT Installation • Base Services Set-Up • Configuration • Entry of Asset-Related Data • Integration with Tivoli LCM • Testing • Migration (to PROD)	• Requirements and Design • Build and Test	• Mentoring Workshop • Go-Live Support • Post Implementation Support • Post Implementation Review
Bendigo Bank Key Responsibilities	• General Project Management & Control (Inc Escalation, change, decision management) • Customer questionnaires or Checklists (completion & collection) • Change Management • Provide existing project doco • Validate Asset Management Process & provide changes to IBM • Provide existing role definitions • Validate Organisation Documents & provide changes to IBM • Provide Asset Management Reports • Validate the Information Guide & provide changes to IBM	• Provide Hardware – OS Installed, Database, Web Services, Full Access, Open Ports / Firewalls • Define Organisation & Location Structures • LDSS – Locations, Sites, Users • Setup Active Directory Groups & Users • Setup Email Account & Access • LDSS – Asset Data • LDSS - Load to DEV and PROD • Prepare UAT Environment(s) and Testers **Note**: LDSS = Load Data Spread Sheet	• Ensure Technical Staff and Access is available to IBM • Ensure Vendors/3rd Parties are scheduled to work with IBM • Make all changes required to USD (From Design Document)	• Facilitate and Attend Mentor Workshops (Max 3 staff) • Provide End-User Training • Complete PIR

High Level Solution Components
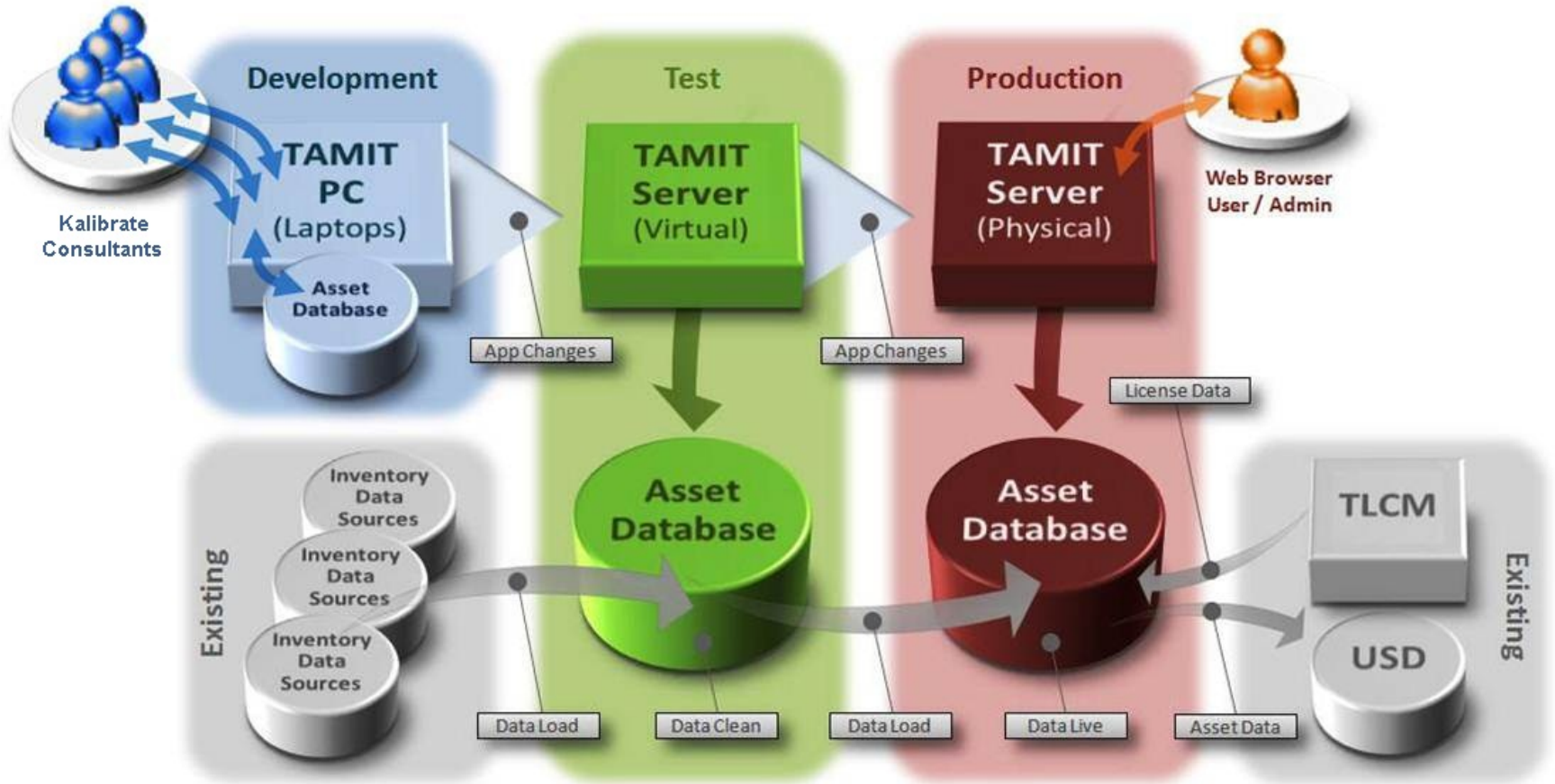
More Detailed Solution Components
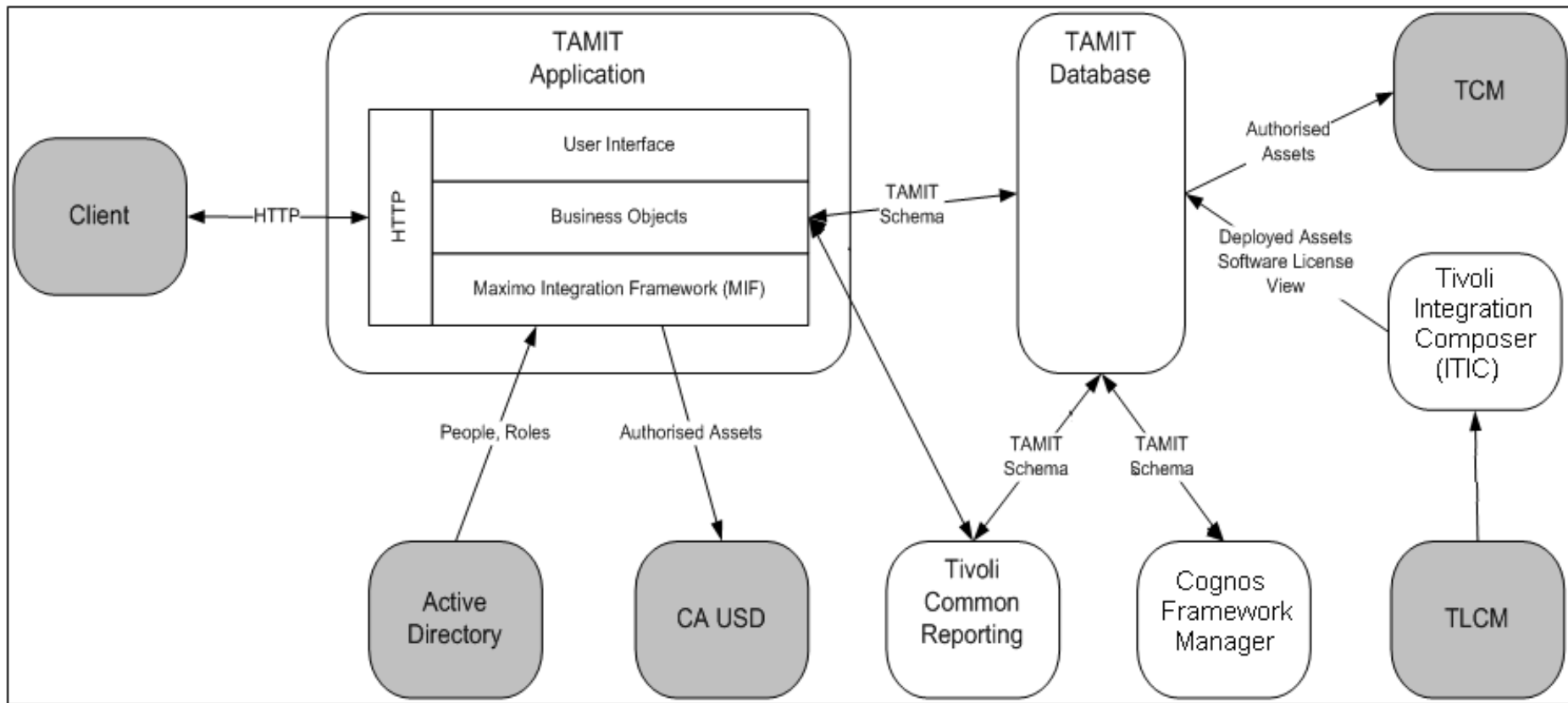
Process Design / Mapping

[Level 0] Procurement, Contracts & Asset Management Process Overview
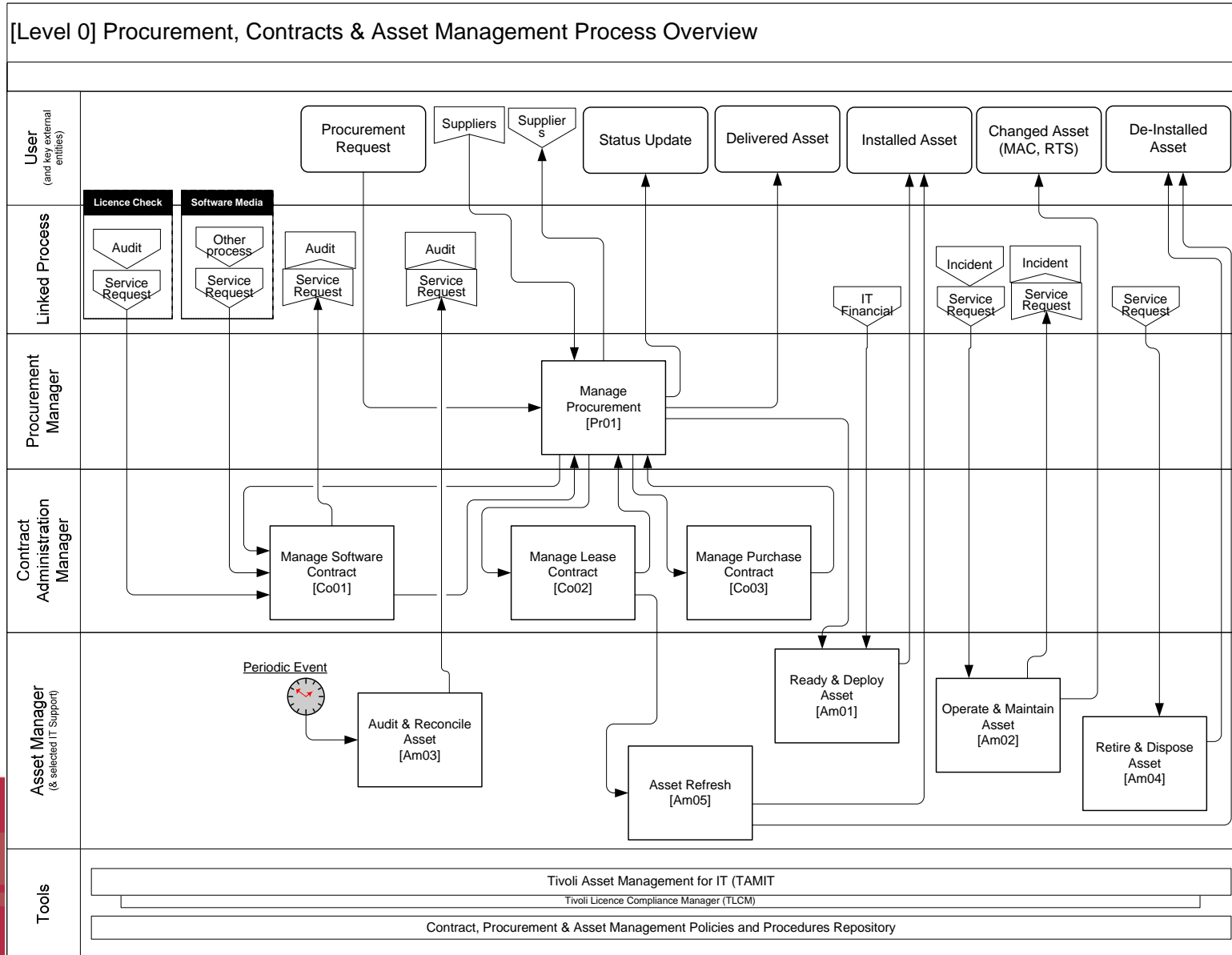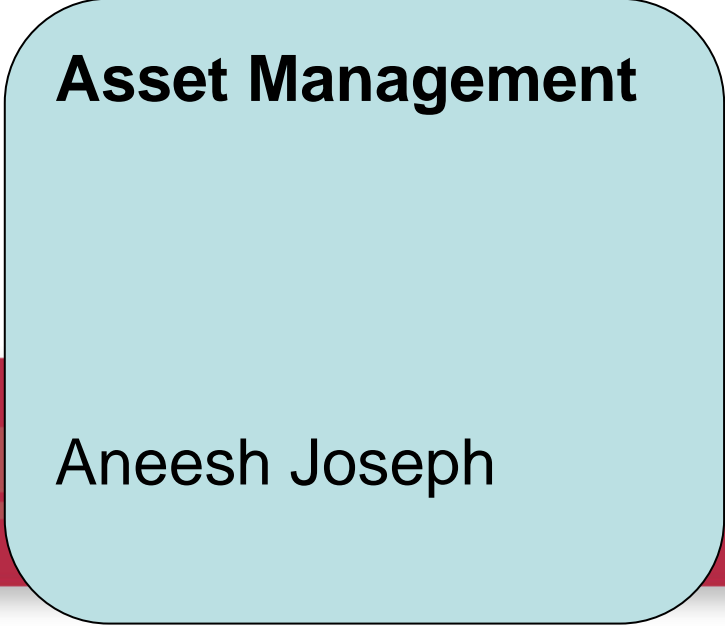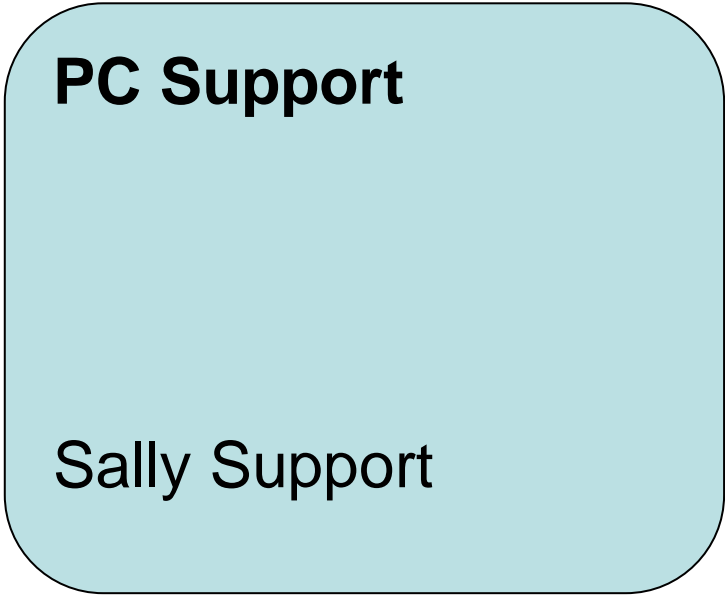
Lessons Learned

- Good Project Management is essential.

- Don't skimp on due diligence.

- Use a collaborative team approach.

- Allocate enough time and resources for a significant amount of face-to-face interaction.

- Get involvement and buy-in from key stakeholders from the very beginning.

- Gather requirements for all key stakeholders as early in the project as possible.

- Conduct UAT early and often.

- Training is important.

TAMIT System Demonstration

Thank you!

Questions?