Strategische Prozessoptimierung für Banken –
die Transformation auf dem Weg zur Industrialisierung
IBM Bankenstamm

Programm

17.00 h  Begrüssung & Einführung
Roger Altorfer, Leader Financial Services Sector
IBM Schweiz AG

17.05 h  Process Management with Lean Sigma
Marc Geiger, Senior Managing Consultant, IBM Schweiz AG

17.30 h  Strategic Process Optimization for Banks
Andreas Künzler, Managing Director, UBS Swiss Bank

18.15 h  Abschluss und Fragen

18.30 h  Apéro und Diskussion

19.30 h  Ende der Veranstaltung
Today’s COO is confronted with multiple dimensions of challenges – integrated concepts leading to industrialization are required.

- Cost pressure
- Support of Revenue Growth
- Demand for Flexibility
- Implement changing Strategies
- Regulatory Demands
- Changing Client demands
- Best Practise Standards of Competition
- IT Costs & rigid IT Architecture
High process costs, long lead times and quality issues are a typical reality of historically grown processes – The Lean method provides solutions and the basis for operational excellence.

Lean helps to establish cost-efficient, robust and flexible end-to-end processes that are aligned with the overall strategy and maximize the client’s satisfaction.
The strategic bottom line: in order to reach strategic growth objectives through optimized operations, Lean tackles both the cost and revenue side.

Operational Excellence Objectives

- Cut operational costs
- Positively influence revenue
- Drive the transformation

Key drivers

- Strategic process selection
- Reasonable method choice
- Speed & Attention
- Sustainability
IBMs proven “Drum-Beat Approach” of 5 Workshops to improve a process – from the Current State pain points to Future State solutions and a matching Implementation Plan

- **Workshop 0**
  - Kick-off & awareness training
  - 1 Day

- **Workshop 1**
  - Understand the current state
  - 1 Day

- **Workshop 2**
  - Map the current state
  - 2 - 3 Days

- **Workshop 3**
  - Future state design
  - 2 Days

- **Workshop 4**
  - Implementation Plan
  - 1 - 2 Days

**Week 1**
- **Workshop 0**
- **Week 3**
- **Week 5**
- **Week 7**
- **Week 9**

**Mobilization**
- Define ambition and scope
- Allocate your resources:
  - Value Stream Lead
  - Cross-departmental Team
- Establish value stream governance structure

**Map end-to-end process**
- Identify what customers want
- Talk to those who do the work
- Gather data and map the end-to-end process

**Design the Future State**
- Generate improvement ideas using lean sigma techniques
- Assess impact and ease to implement
- Design roadmap

**Implement Solutions**
- Run a Pilot
- Implement Solutions
- Deliver the benefits

**Working Style**
- Fast
- Informal
- Structured

**Stakeholder Report Outs**
- Sign off workshop outputs
- Build cross-functional consensus
- Decide next steps / solutions
Process improvement report:
A typical core banking process – from an unproductive Current State to a lean cost-efficient Future State (~ 25% less costs)

Current State Analysis

Major Pain Points include:
- Very high rework figure due to bad quality leads to multiple iterations per case
- Physical document transport time and waiting time determines the process Lead Time
- Multiple client interactions make the process unpredictable and influences client relationship negatively
- All cases follow the process designed for the most complex case
- No end-to-end process understanding of employees working in the process
- Very fragmented IT landscape provoking many media breaks

Future State Solution

Major Benefits include:
- Sales personnel with less than half of the administrative work
- Reduction of processed volumes by half due to improved First Time Quality and early triage
- Physical documents replaced by e-workflow eliminating transport and waiting time

Key Metrics
- Max Lead Time reduced from 1 month to 1 week
- Max Processing Time reduced from 3 days to 2 days
- First Time Quality improved from 5% to 80%