

Process Governance Ensures Financial Firm's Project Success

THE CHALLENGE

A large financial services firm must successfully deliver new IT projects to meet the demands of the business. Their Project Management Office (PMO) is responsible for ensuring all projects are completed on-time, on-budget, and within scope:

- ✓ Periodic reviews validate each project's compliance with processes and quality of project artifacts
- ✓ Implementing, communicating, and enforcing changes to best practices present a formidable challenge which impedes the evolution of best practices
- ✓ Management and the PMO need visibility and the ability to identify risks

THE SOLUTION

CAI's Advanced Management Insight (AMI) solution was selected to automate PMO assessments, project oversight, and the institutionalization of governance policies and project management best practices of post implementation reviews. AMI provides:

- ✓ Institutionalized governance policies and project management best practices
- ✓ Collection and evaluation of survey responses and operational metrics to provide a clear view of status and operational risk
- ✓ Automated post implementation reviews through collecting and evaluating performance metrics from management systems and by surveying participants and stakeholders to determine satisfaction levels and identify risks

THE VALUE

AMI provides managers and executives with visibility into processes as well as best practices standardization, optimization, and enforcement. This results in:

- ✓ Reduced costs and disruption associated with project reviews and process audits
- ✓ Reduced rework as a result of early warnings into potential risks
- ✓ Consistent stakeholder and project team feedback
- ✓ Streamlined process for defining, institutionalizing, and communicating optimized processes

THE LINE OF BUSINESS

The financial services firm is a leading wealth management company operating in multiple Asia Pacific countries. The organization provides a range of financial products and services. Investments are managed across all the major asset classes including equities, fixed interest, infrastructure, property, diversified funds and multi-manager funds.



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