

## CASE STUDY

# Nationwide Building Society Mitigates Resilience Risk and Supports Capability Investments

## About Nationwide Building Society

Nationwide Building Society is a British mutual financial institution and the world's largest building society. It is run for the benefit of its 15 million UK members, providing checking account, saving, mortgage, credit card, loan, insurance, and investment products.

## Challenge: Proactively Address Resilience and Invest with Confidence

Nationwide Building Society's enterprise architecture program was challenged to ensure better decision making could be delivered at every level of the organization. Without a consolidated view of their data, it was difficult to understand if the investments to the applications and technologies that support the business were the right ones. "Our decisions were based more on opinions than fact," says Paul Ballard, principal architect at Nationwide Building Society. "There has been an increased regulatory focus on resilience and an enduring need to ensure we can provide resilient retail banking services for our members."

Without the ability to understand the end-to-end customer journey mapping to define how the company delivered critical services to its members, it couldn't be certain that it was mitigating the critical resilience risks and prioritizing investments in those areas. Similarly, it couldn't measure how it was improving its overall resilience position.

Ballard and his team looked at the business from the eyes of the customer and what they'd want in terms of services. They didn't stop at the technology stack, realizing that delivering services depended equally upon people, location, and third parties. By identifying and then assessing the resilience position of each area, it would be easier to make targeted investments into uplifting the business capabilities where necessary to support critical customer services.



## Overview

### Customer

Nationwide Building Society

### Geographies

United Kingdom

### Employees

Approximately 18,000

Nationwide Building Society uses Planview's solution for capability and technology management as its single, trusted repository for application portfolio management and technology portfolio management. With Planview, the enterprise architecture program can proactively address resilience risk and improve confidence in investments, ultimately providing resilient banking services to members.

With the assessment process complete, it was time to focus on the data. Data was everywhere but little of it was integrated, as well as incomplete or inaccurate, therefore unreliable. "There were too many things in our organization that we didn't have visibility into," says Ballard. "What inherent risks were we walking blindly towards? We had to consolidate the data if we wanted to have any chance of managing it and using it to inform decisions."

## **Solution: Holistic Map of Relationships within the Application Portfolios**

Planview's solution for capability and technology management was chosen to serve as a single source of truth for application portfolio management and technology portfolio management. The team built their Planview solution as a digital copy that maps how its business units are realized. Key resilience indicators were implemented, so the resilience of all assets can be analyzed.

Ballard added data confidence features within the solution to drive uplift in data quality, giving decision makers a better way to assess how trustworthy the data is. With Planview, it is easier for the team to spot what Ballard calls "resilience gremlins" before they cause damage. "Data is everything," says Ballard. "If you can't produce reports on your technology portfolio or anything else, what good is it?" The solution provides a view of Nationwide's business capabilities, how they link to business processes, and how that links to applications and the underlying technology. It also reveals the people and third parties involved. Mapping the enterprise architecture repository in this way ensures quality and confidence in the landscape of the business.

Ballard says, "We've had some success around reporting our resilience position but our key learning is that getting the operating model around the management of the data is crucial. No matter how good the solution is, if the data is not at the right quality, then you can't report to the organization with confidence. So while the tooling can provide a compelling solution, getting the data right is key to success."

With resilience as the strategic imperative at Nationwide Building Society, Planview's solution for capability and technology management has provided the company with a trustworthy database and enables Ballard and team to report on the resilience position across a number of business lines. With good data in a central location and a robust layer of analytics to make sense of the data, the company is better positioned to target investments towards the appropriate risks and towards strategic applications and technologies.

## **Results: Prioritized Investments to Address Risk and Support Business Capabilities**

Since implementing Planview's solution for capability and technology management, Nationwide Building Society has been able to:

- Consolidate data from multiple applications across all business units into a single, trusted repository, giving insight into data and architecture to create an ecosystem of integrated tools
- Begin to detect and diminish the risk of resilience threats
- Start to base investment decisions on actual data instead of opinions, and ensure they are addressing the right risks
- Establish reporting on their resilience position and make improvements that support capabilities and compliance across multiple business lines
- Set up processes to control technical debt by directing investments to strategic applications and technology

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