

## Westpac New Zealand Ltd.

*Using IBM Blueworks Live software, the bank creates thousands of reusable process artifacts*

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### Overview

#### The need

As part of a larger business process management initiative, Westpac New Zealand Ltd. needed to create a process library.

#### The solution

The bank used the IBM® Blueworks Live™ cloud-based business process management application to begin documenting its processes and storing its process documents.

#### The benefit

In just three months, the bank created more than 2,000 artifacts in the Blueworks Live application, which will help improve asset reuse.

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Founded in 1861, Westpac New Zealand Ltd. provides a full range of retail and commercial banking and wealth-management products and services to customers throughout New Zealand. The bank operates under the Westpac New Zealand, Westpac Life New Zealand and BT New Zealand brands, with branches and ATMs located throughout the country.

### Working to improve customer service

In operation for more than a century, Westpac had a complex IT environment that had increased in size over the decades. The bank therefore began a strategic initiative to simplify it. Part of this simplification initiative included examining existing business processes to find ways to improve them to better serve customers. “Whether you’re a business and you’re only looking at part of the process that you do, or if you’re on a project working on a particular piece of work, you’ll just focus on your little bit,” says Sandra Moorhead, senior manager of process transformation at Westpac. “So, it’s very difficult to get an end-to-end customer view. Obviously, in this day and age, if you aren’t putting your customers at the start and the end of everything that you do, then you’re probably not going to be around for too long.”

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*Rolling out the IBM Blueworks Live application was easy. After users heard that it was available, they were eager to begin using it. “To be honest, once people started to get access [to the Blueworks Live application], the requests for access just became greater and greater as word got out,” says Sandra Moorhead, senior manager of process transformation, Westpac New Zealand Ltd.*

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## Solution components

### Software

- IBM® Blueworks Live™
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The company's existing method for process documentation, using Microsoft Visio software and open source tools, was cumbersome and often resulted in duplicated effort. A staff member would create project documentation and then move on to another project. "So you'd have people come in, document current state, and that would be put in the project documentation," says Moorhead. "The project would end, that person would leave, it would go to another contractor, and that documentation would never be seen again. Later on, somebody else is doing a project that affects the same process and they're going down to the business SME again, who is very short on time and very busy, and they're thinking, I only did this six months ago, where is the documentation?" To improve its processes, the bank needed to establish a process library.

### IBM Blueworks Live software adopted virally

The bank had recently acquired an IBM business process management solution, which included the IBM Blueworks Live cloud-based business process management application. "So, basically as soon as I found out that we had licenses, I spent a bit of time just working out what the governance structure would be," says Moorhead. "I also went to the IBM Impact conference and learned a lot there. And that really helped kind of form the picture and how it should look. So my team looks after the governance of the tool. I've got a brilliant team who has set up how it should be structured, how it would work, who has what access, and how it ties into our enterprise architecture tool."

Moorhead and her team also began a pilot project of the Blueworks Live application, granting a limited number of people access to it. "To be honest, once people started to get access, the requests for access just became greater and greater as word got out," says Moorhead. "So it was bursting at the seams to get out of pilot and into production, because it was a popular tool of choice for users."

Today, approximately 130 employees at Westpac are using the Blueworks Live application. Users include business analysts, who are doing process diagrams to prepare for future business process automation; subject matter experts (SMEs), who are creating process documents and training materials; and operational risk and compliance managers, who need to know how a process works so that they can identify areas of risk and make sure they have the correct controls in place. Users have found that the Blueworks Live software is easy to use. “With the discovery map view in Blueworks Live, it’s so easy. You basically create a list of steps and press a button, and it creates a process right before you,” says Moorhead.

### **Improving efficiency and collaboration**

In the past, Westpac had inefficient methods for documenting processes. “We had our process documents in a repository, but we had to rely on people emailing documents to us for us to add them to it,” says Moorhead. With Blueworks Live software, users create the document right in the Blueworks Live application. “There’s not an extra step to move it into the library; it is the library,” says Moorhead. “In other words, where you draw it is where you store it.” The ease of creating process documents directly in the Blueworks Live application has led to a massive increase in the number of artifacts available. “Over two years, we probably got about 900 - 1,000 artifacts in our old library, whereas in three months we have over 2,000 in Blueworks Live,” says Moorhead. This large increase in available documents will help improve document reuse. When employees approach a new project, the first thing they can now do is look in the Blueworks Live repository to see what documentation already exists. “People should never really be starting from scratch,” says Moorhead. “When anybody wants to do any piece of work, whether it’s an IT project, a business project, a bit of strategy work or whatever, you’re not going out and starting from scratch, you’ve already got everything that makes the bank in one place. And Blueworks Live is where we store the processes for how we do things in the bank.”

Because the Blueworks Live application is cloud-based, it facilitates collaboration among team members in different locations with near-real-time collaboration capabilities. “So, you as a business user can do all your processes in Blueworks Live, with your SMEs, business people and the team leaders, and actual people who do the job sitting there in the room with you,” says Moorhead. In addition, remote employees can also benefit. An employee in one office can create a process document while employees in another office follow along in near-real time. Users can access the application from any device that’s connected to the Internet, including tablets and mobile devices. This collaboration has helped bank employees gain greater insight into the bigger picture, which ultimately will help improve customer service. “Actually getting everybody in a room and agreeing what the current state is quite often gives people clarity to understand where they fit into the picture overall,” says Moorhead. This visibility has helped the bank optimize its processes even before it begins to automate them.



## For more information

To learn more about IBM Blueworks Live software, please contact your IBM marketing representative or IBM Business Partner, or visit the following website:

[ibm.com/software/products/us/en/ibmbluelive](http://ibm.com/software/products/us/en/ibmbluelive)



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