

# Case Study

CLIENT: THE ROYAL BANK OF SCOTLAND

## The Organisation

Founded in 1727, with a London Office by 1874, The Royal Bank of Scotland (RBS) and NatWest are today ranked at number one and two by customers who state they are 'extremely pleased' with their banking provider.



## The Requirement

RBS embarked on a review of their financial systems during 2007. The prime objective was to enable the consolidation of the various processes and systems inherited via their acquisition program.

Following a detailed procurement program, the chosen solution was Oracle's eBusiness Suite Financials. During 2008, the Teams from RBS's Financial Division worked with Oracle's Consulting Teams to align eBusiness Suite to the Bank's business practices. During this initial phase, they also discussed the training and ongoing support of RBS's users.

Ruth Sallabank, Senior Project Manager, confirms, "With our dispersed user base migrating from a magnitude of legacy systems, user training and support was a key part of our project planning and Oracle supported this initiative."

## The Product

UPK provides up to 11 different outputs, including simulations (CBT), test scripts, system processes, quick reference cards and classroom training materials. Together these outputs support Project Teams, from blueprint through to supporting users, at go-live. Automated recording uses object recognition technology to automatically capture system processes and this same technology integrates UPK into the eBusiness suite Help Menu, providing users with on-the-job support to a field level. The optional usage tracking function provides Managers with distance learning assessments reflecting user activity and achievement.

## The Partner

Larmer Brown is Oracle's preferred User Productivity Kit (UPK) Services Partner, having successfully delivered UPK projects since 1994.

Larmer Brown was introduced to RBS by Ken MacLennan of Oracle in May 2008. Initially, Larmer Brown hosted technical showcase events, to enable the different members of the RBS Finance Project Team to appreciate the value that UPK could bring to their Project. The next phase involved specific technical sessions, to ensure that UPK adhered to the security and performance criteria required by RBS's Technical Services Team.

Following a rigorous procurement process, Larmer Brown was awarded the UPK Managed Development Project in February 2009.

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## The Solution

Time and budget drove the Finance Team to opt for a managed UPK solution which included standards, methodology and best practice, developer training, hosting, technical support and development services.

Having recognised the value of retaining UPK knowledge and experience within the RBS Team, Isobel Robertson was recruited as Training Manager and in turn recruited a team of three UPK developers. Isobel explains, "My previous UPK experience meant I fully appreciated the value of having an RBS team capable of maintaining the content at the 'business as usual' stage. Once the Larmer Brown Team left, I needed to be sure we could develop and enhance the content to reflect the changes and updates, without incurring ongoing costs."

## The Challenges

A key requisite for any UPK Development Project is the provision of a development environment with access to the target application, in this instance eBusiness suite. Owing to the nature of the Bank's business and therefore the actual content being developed, protection and preservation of the Bank's strict security guidelines was crucial. With tight timelines, the decision was made to utilise Larmer Brown's hosted development environment, thereby providing the Bank with a secure and affordable solution. With a five-day turnaround Isobel Robertson adds, "With an internal UPK Development Team ready to start work, the hosted solution was critical to ensure this piece of work was not deferred."

## The Result

The Project ran from March to May 2009. During

this period 164 comprehensive processes were created, completed and signed off by the business. Having worked alongside the Larmer Brown Team, the RBS UPK Team added measurable value to the development pace as the project progressed.

Feedback from the different sections of the Project Team during the Pilot Phases was outstanding. Of particular value was the simulated recreation of the more complex system processes which, when supported by graphical concepts and process documents, enabled test users to complete tasks without issue.

## The Future

Following rigorous testing, UPK met both the security and performance requisites set by the Bank and is now hosted internally.

With the success of the UPK Finance Phase 1 Project, plans are being finalised to extend the use of UPK through to a number of subsequent phases. In addition, other Project Teams within the Bank are utilising Larmer Brown's showcase events to investigate the suitability of UPK for their own Projects.

## About Larmer Brown

Larmer Brown's key business objective is to help organisations realise the desired business benefit from their software applications, through successful user adoption programmes. We have been using User Productivity Kit technology to provide business transformation, documentation and training services since 1994. Larmer Brown is an Oracle Certified Partner and the only User Productivity Kit preferred services partner.