



FMO – Entrepreneurial Development Bank

Process automation and workflow helps Dutch development bank to work more effectively – empowering entrepreneurs “to build a better world”

Headquartered in The Hague, FMO is a public/private development bank that offers capital and expertise to companies, projects and financial institutions in developing and emerging markets. The Dutch government is the bank’s major shareholder. With Datalytx as its solution partner, FMO embarked on a wide-ranging business process redesign and digital transformation project, deploying a workflow solution that includes K2 process automation and leading edge Microsoft technologies.



FMO Entrepreneurial Development Bank

Client

Dutch development bank; annual loans/commitments of more than €1.5 billion.

Challenge

Achieve administrative process redesign (APR); improve customer satisfaction.

Solution

Process automation and workflow solution, including K2 and Microsoft technologies.

Benefits

A more responsive, flexible and efficient business; enhanced workflow at every stage of a client relationship.

The challenge

When a satisfaction survey identified opportunities for FMO to become more responsive and flexible in how it engaged with clients, management planned a business process re-engineering initiative to improve operational efficiencies. This included a review of key areas such as strategy, operations and HR, alongside an administration process redesign (APR). In particular, an assessment of the workflow system developed in-house prompted FMO to consider the value of tracking all events within a process against key milestones, as well as the role of workflow in driving a process rather than simply facilitating or supporting a process. Angelica Ortiz de Haas, Director Mid Office at FMO, says workflow is a critical element “because it supports our whole core activity.”

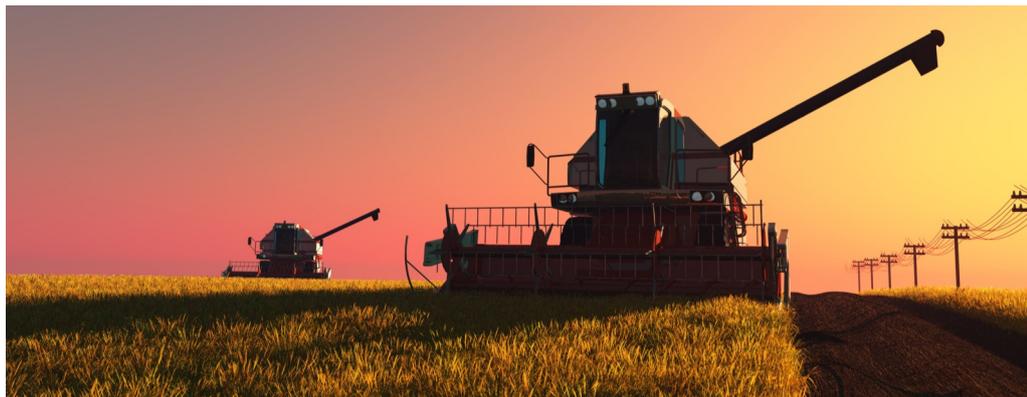
With change focused on replacing the legacy workflow application, improving customer satisfaction and speeding up response times in the end-to-end process from acquisition to exemption, FMO also wanted to gain improved document storage capabilities and the ability to share deal status and information more effectively.

Why Datalytx?

Rolf Daalder, ICT Director at FMO, described Datalytx as “well-experienced people,” while Emily Ho, Quality Control, characterised the team as “Fast, flexible, up to speed quickly.” Erwin Kramer, Applications Manager, said, “The flexibility of resources was very fine.”

The solution also enables users to monitor the exact status, location and time taken for individual process instances. “It is a very stable environment with not a lot of support needed.”

Rolf Daalder,
ICT Director
FMO



“Key stakeholders commented that the system is easy to use and a key strength of K2 is that it is easy to see where a transaction is at any given time.”

Angelica Ortiz de Haas
Director Mid Office, FMO



Solution

With the new workflow system required to communicate transaction, business and process status, technologies deployed by Datalytx comprised K2.Net as the workflow solution, InfoPath, Web services, Microsoft CRM as the front-end where users can initiate and track processes, SQL Server, BizTalk, ACBS, SharePoint and Active Directory. Wide-ranging business processes covered included: register new client; new opportunity registration by product; opportunity approval; client checking (CAAML); contracting; disbursements; client credit review; transfers to special operations department; change requests (clients, contracts, disbursements); and credit cancellation.

A strong emphasis was placed on users investing the time required to contribute to requirements gathering, as well as user testing throughout implementation of the project. End-user champions were also selected in each department to act as conduit for training and solution awareness, considered critical success factors in solution rollout and acceptance. Before the technical solution was defined, a comprehensive business process review was undertaken to define milestone and status points, key actions as well as communication-related activities and stakeholders.

The implementation team comprised Datalytx personnel, including K2 and InfoPath specialists, plus FMO financial systems and web services staff, and Fidelity Information Services for the *Advanced Commercial Banking System (ACBS®)* product suite. Molly O’Dea, FMO

Business Analyst, said the Datalytx team performed “exceptional work” and was able to “understand and adapt to business perspectives... no time wasted.” In the solution, K2 sits on top of web services, which provide access to all necessary back-end systems. Task lists are managed through SharePoint, with processes initiated via a web service that sits within the Microsoft CRM web part. Documents are stored within SharePoint.

Benefits

Every FMO staff member involved in a client deal or transaction is now informed of the transaction status; specific users are only prompted with notifications and actions required that relate to them. Processes are tracked automatically, removing the need for front and back office staff to waste time and effort by manually tracking and chase processes. Once a new client process is initiated, the workflow sets up the necessary SharePoint team site where documents are maintained specific to clients. The solution also enables users to monitor the exact status, location and time taken for individual process instances. “It is a very stable environment with not a lot of support needed,” says Rolf Daalder, ICT Director, FMO. Angelica Ortiz de Haas, Director Mid Office, FMO, adds: “Key stakeholders commented that the system is easy to use and a key strength of K2 is that it is easy to see where a transaction is at any given time.”



About Datalytx

“Datalytx is a leading UK provider of big data, digital transformation, governance and analytics solutions, all delivered as a service from the cloud. Our client-focused approach delivers rapid gains and sustained ROI, meets requirements to store and manage huge data volumes, deploys powerful business-focused analytics, and digitises essential business content and processes. The trusted management information that results enables more effective and more profitable decision-making. Our diverse client base includes AstraZeneca, Nissan, ABN AMRO, Surrey County Council, EasyJet, Allianz, Unisys, Capita, Eversheds, Veolia Environment and UK local government. We also partner with other leading providers to deliver best-of-breed solutions, including Microsoft, K2, Talend, Tableau, HP Vertica, KnowledgeLake and Hortonworks.”