



**Seminar Value creation met SIAM  
en uitreiking scriptieprijs  
24 maart 2022**



# Patrick Follon

Bestuur



# Sven Wernsing

Engagement Manager bij CGI





# Maurits Denker

Manager IT regie bij de Hypotheker



# Doelen

- ▶ Waarom wilde De Hypotheker SIAM implementeren? Wat waren de achterliggende doelen?
- ▶ Wat heeft De Hypotheker samen met CGI gedaan om dit te realiseren? Welke aanpak is gekozen? Is er een fasering gebruikt? Welke rolverdeling was er?
- ▶ Wat waren de resultaten? Is het doel bereikt? Zijn er nog activiteiten te doen? Hoe wordt het model actueel gehouden
- ▶ Welke leerpunten willen De Hypotheker en CGI de toehoorders meegeven?

# Agenda

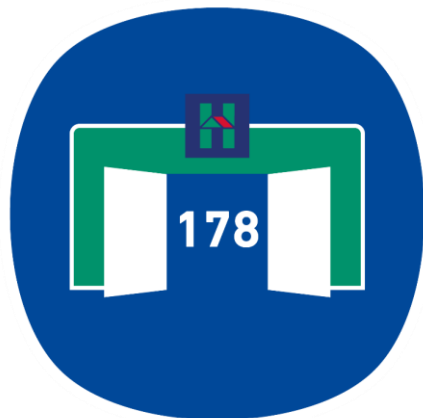
- ▶ Even voorstellen:
  - De Hypothekers Associatie BV
  - CGI
- ▶ Aanleiding tot uitbesteding en SIAM
- ▶ Transitie
- ▶ Tijdslijnen
- ▶ Hoe ziet nu de samenwerking eruit?
- ▶ Lessons learned
  - Wat zouden we anders gedaan hebben met de kennis van nu?
  - Wat zouden we weer doen?
- ▶ Waar staan we nu
- ▶ Toekomst

**Waar kennen jullie de Hypotheker van?**

# De Hypotheker in numbers (EoY 2021)



WEBSITE VISITS



OUR BRANCHES



VISITORS AT THE BRANCHES



SEVICE CONTRACT (OTD)



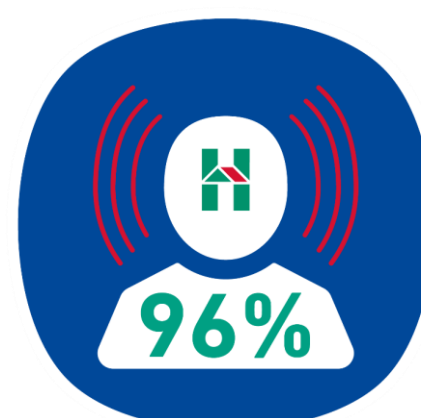
CONVERSION



RATING ADVIESKEUZE.NL



CHAT, EMAILS & 0800 CALLS



BRAND AWARENESS



MARKET LEADER



# De Hypothekers Associatie BV

▀ An IT and security perspective



**850 Users**



**>1mln customer records**



**178 Branches**



**100 Franchisees**



**Brand & Reputation**



**Permit**

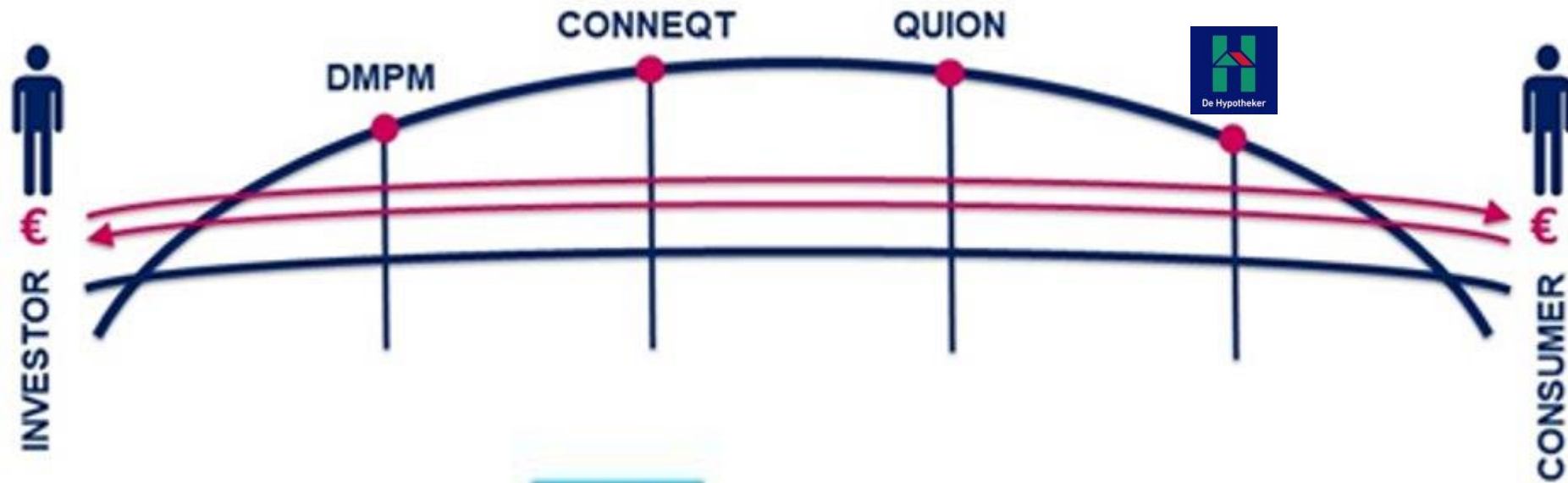


**Personal data**



**Primary processes**

# Blauwtrust Groep



**Blauwtrust**  
Groep

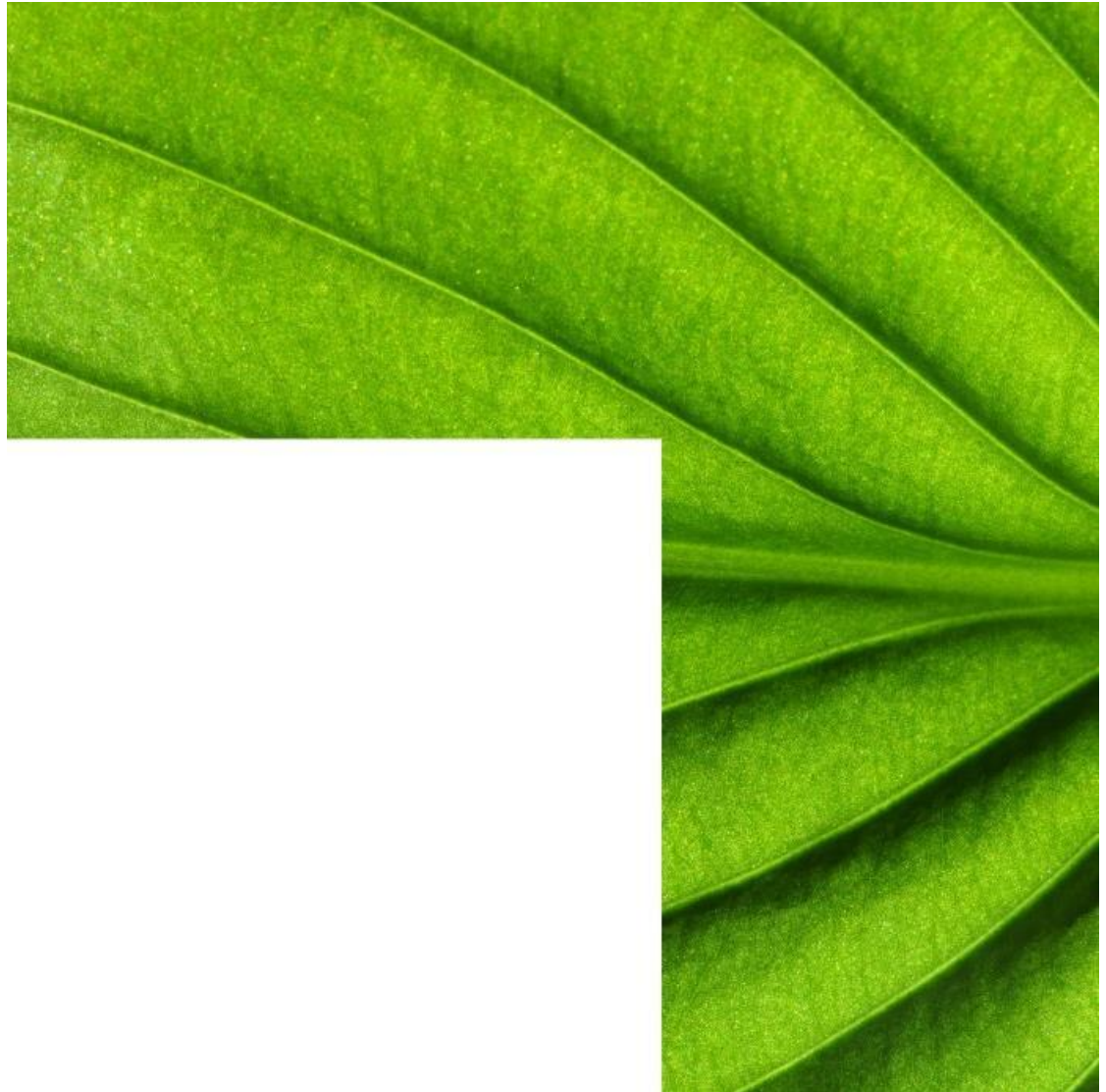


# Mortgage sector stake holder field



# Even voorstellen CGI

Sven Wernsing  
Engagement Manager  
24 maart 2022



# CGI at a glance

Founded in 1976  
45 years of excellence

CA\$12.1 billion revenue

82,000 consultants

400 locations in 40 countries

5,500 clients benefiting from  
end-to-end services

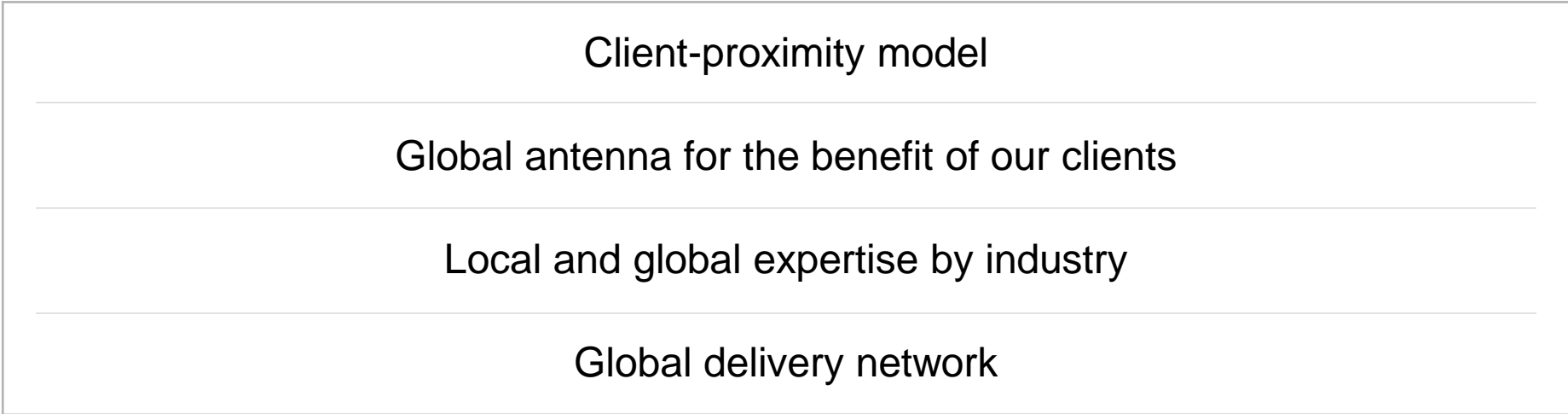


# Range of services and differentiators

End-to-end services



Differentiators



# Our expertise is where you are, yet globally connected

- Groningen
- Amsterdam
- Amstelveen
- Arnhem
- Rotterdam
- Eindhoven
- Maastricht



**2,500**

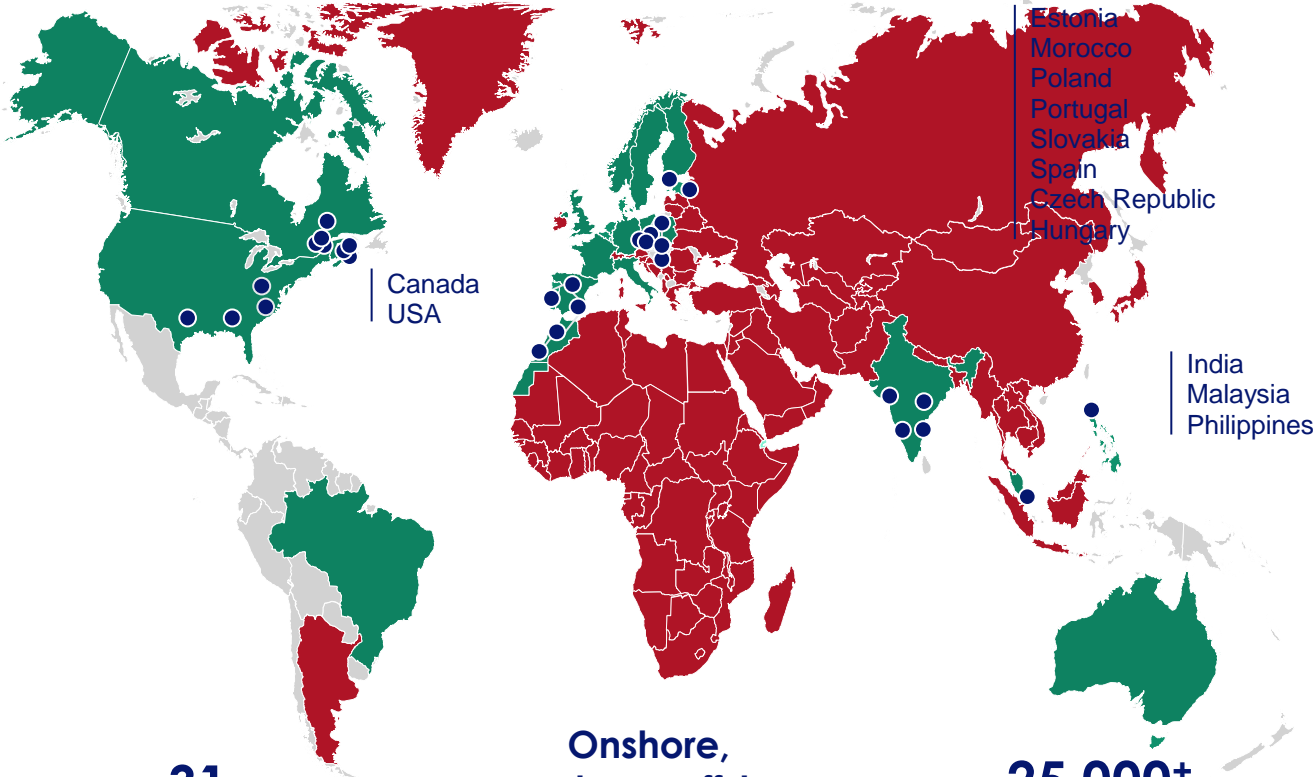
staff

**7**

sites

**12**

Industries



**31**

Global delivery centers

**Onshore, nearshore, offshore**

Flexible mix of blended delivery locations

**25,000+**

of a total of 77,000 staff

- Estonia
- Morocco
- Poland
- Portugal
- Slovakia
- Spain
- Czech Republic
- Hungary
- India
- Malaysia
- Philippines

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# Our way of working

Alignment is the recipe for success

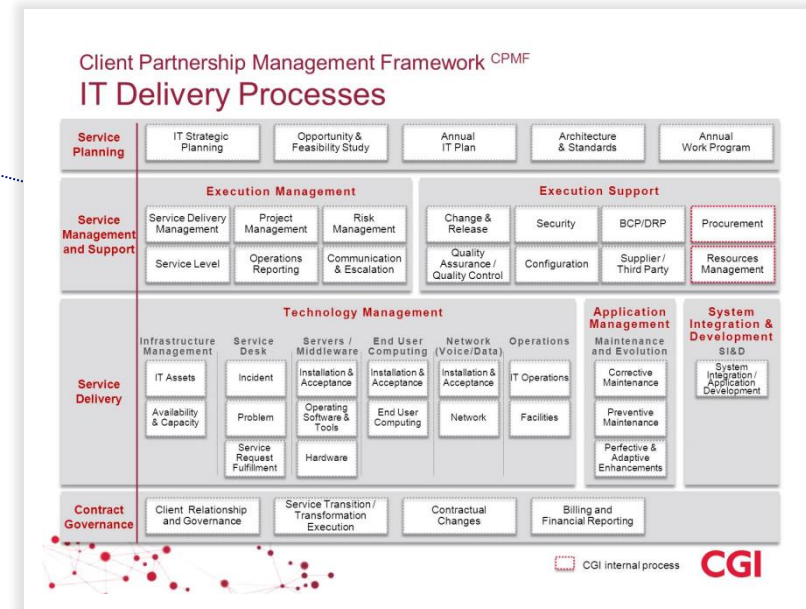
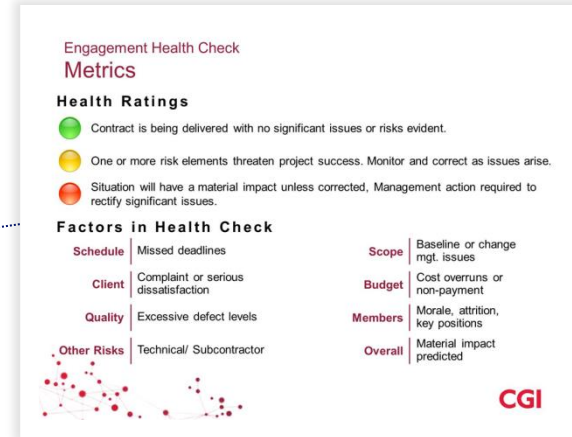
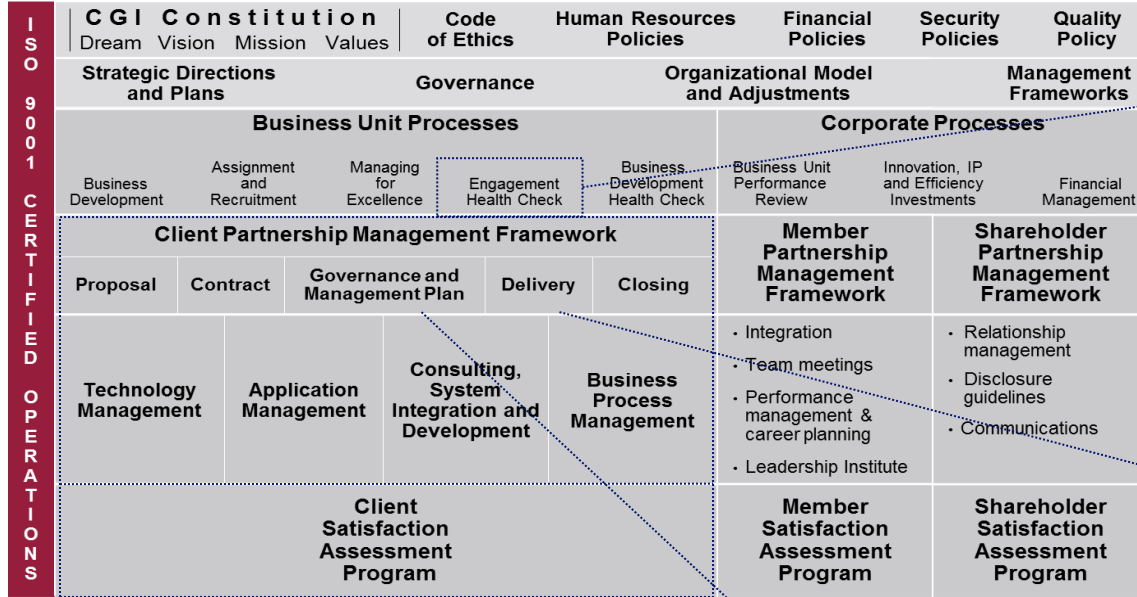


**CGI**

Experience the commitment®



# Our Management Foundation



**CGI CLIENT SATISFACTION ASSESSMENT PROGRAM**

Form No: QSM/116  
Created: June 30, 1998  
Revised: August 2007  
Version: 2.1.0

**CLIENT SATISFACTION ASSESSMENT PROGRAM QUESTIONNAIRE**

**PART I - IDENTIFICATION**

Client Organization:  Client Business Unit:   
 Client Representative:  CIO Representative:   
 Client ID:   
 Engagement Type:  Engagement ID:   
 Interview Date:  Interviewer:  Yes  No

**PART II - SERVICE QUALITY**

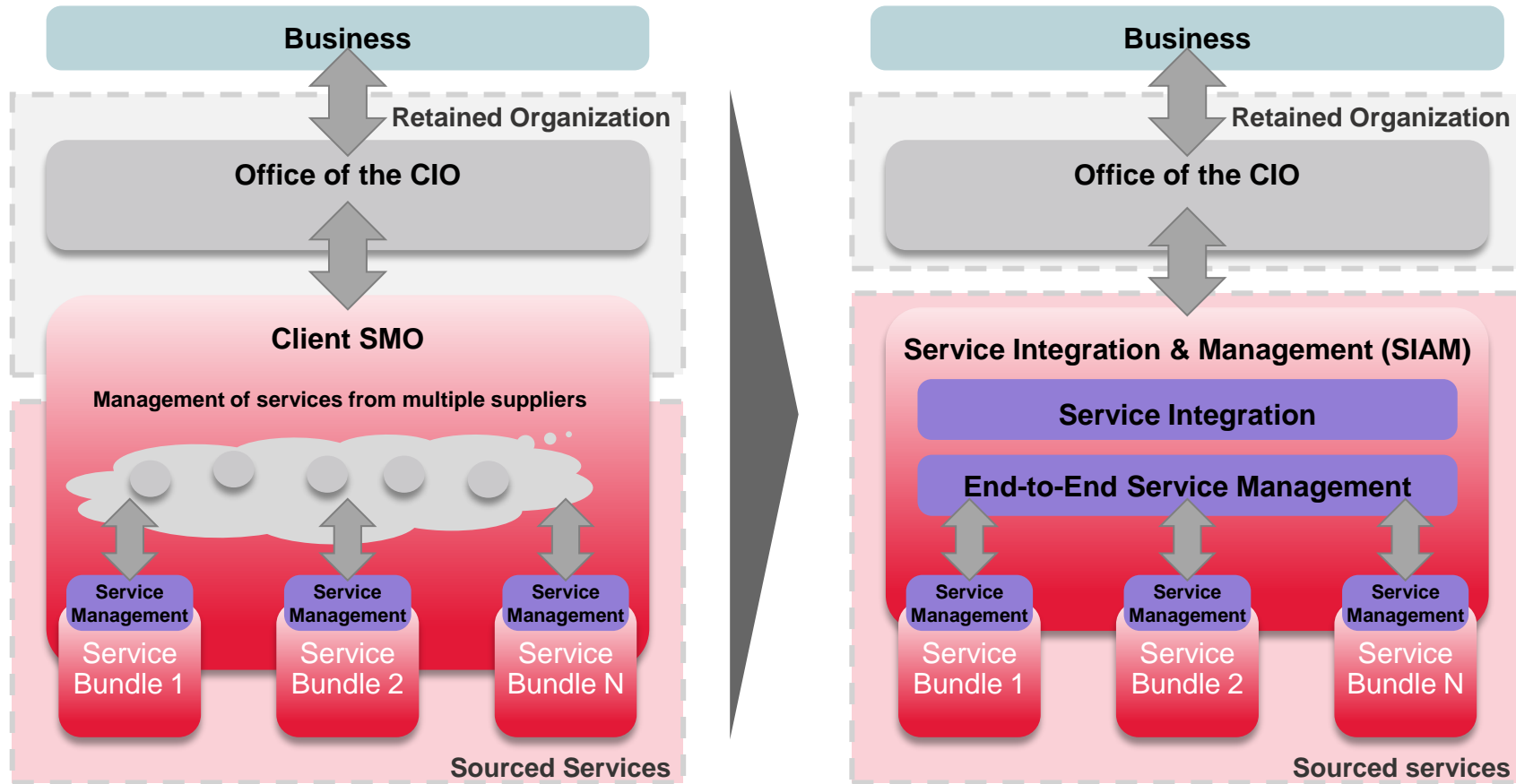
QUESTION	SALES	DELIVERY	CLIENT COMMODITIES/EXPERIENCE
1. <b>Undertaken Expectations</b> - To what degree do you agree or disagree with the following statement: "CGI delivered what we expected?"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. <b>Met Expectations</b> - To what degree do you agree or disagree with the following statement: "CGI met what we expected?"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. <b>Quality of Results</b> - How satisfied are you with the quality of the results of the project?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. <b>Communication</b> - How satisfied are you with the communication from CGI throughout the project?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. <b>Availability</b> - How satisfied are you with the availability of CGI resources throughout the project?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. <b>Customer Service</b> - How satisfied are you with the customer service from CGI throughout the project?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. <b>Value</b> - To what extent are you satisfied with the value of the project?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. <b>Leadership</b> - How satisfied are you with the leadership of the project?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**KEY:** SALES - NOT APPLICABLE DELIVERY -  LEADERSHIP -

Date:  Name:



# Service Integration and Management (SIAM)



# Alternative models

...to implement SIAM



## Independent 3<sup>rd</sup> party

- Usually the most expensive choice
- Abilities to take end-to-end responsibility over 3rd parties
- Objectivity, SIAM processes theory leadership, focus in IT processes
- Usually not provided by major Service Providers



## Internal SIAM

- Availability of required experience, knowledge, tools and processes for efficient and effective SIAM operations
- Direct costs, continuity, training
- Balancing between priorities
- Availability for 24x7 operations

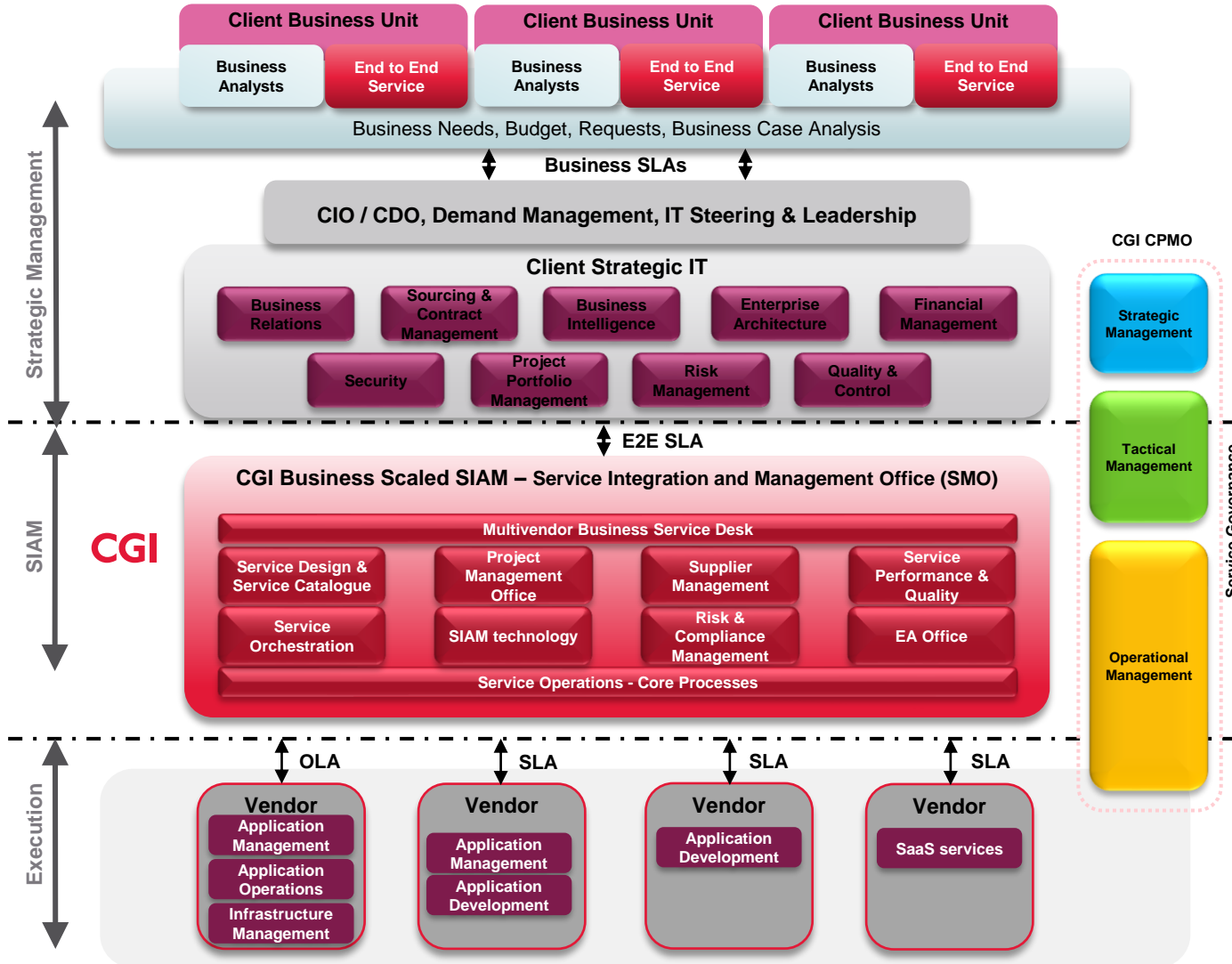


## Service Provider

- Provided together with the delivery of at least one of the Service Towers
- Cost benefits, economies of scale, experience, people, processes, tools and best practices, business continuity
- Service Provider has double interests and capability to succeed in the E2E delivery

# CGI Business Scaled SIAM Operating Model

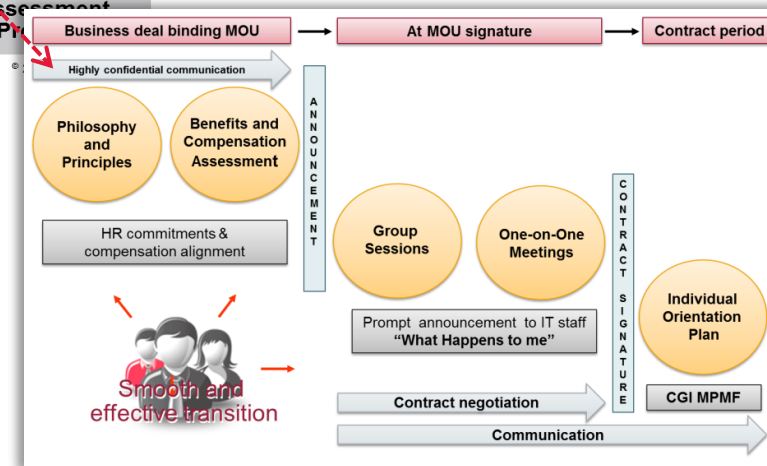
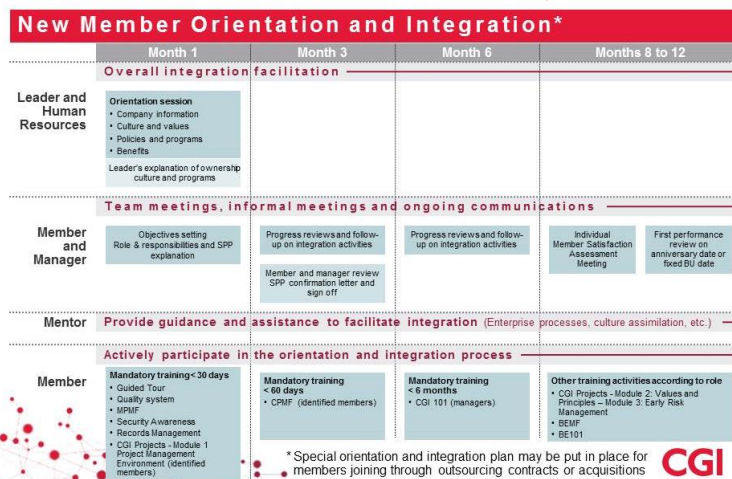
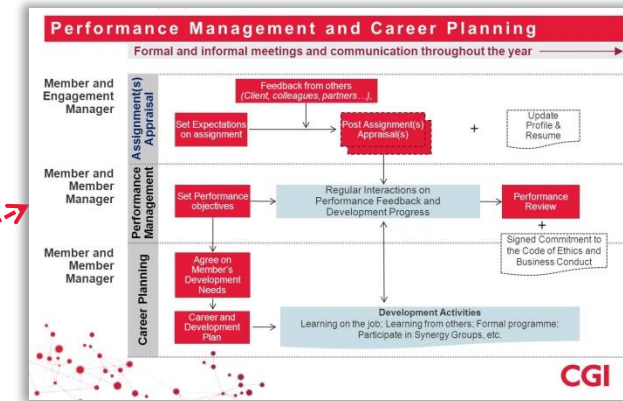
Seamless integration to CIO Office through Service Management Office (SMO)



# Our willingness to take over staff

HR approach – we call our employees ‘members’

ISO 9001 CERTIFIED OPERATIONS	CGI Constitution Dream Vision Mission Values		Code of Ethics	Human Resources Policies	Financial Policies	Security Policies	Quality Policy	
	Strategic Directions and Plans		Governance		Organizational Model and Adjustments		Management Frameworks	
	Business Unit Processes				Corporate Processes			
	Business Development	Assignment and Recruitment	Managing for Excellence	Engagement Health Check	Business Development Health Check	Business Unit Performance Review	Innovation, IP and Efficiency Investments	Financial Management
	Client Partnership Management Framework				Member Partnership Management Framework		Shareholder Partnership Management Framework	
	Proposal	Contract	Governance and Management Plan		Delivery	Closing		
	Technology Management		Application Management		Consulting, System Integration and Development		Business Process Management	
					<ul style="list-style-type: none"> <li>Integration</li> <li>Team meetings</li> <li>Performance management &amp; career planning</li> <li>Leadership Institute</li> </ul>		<ul style="list-style-type: none"> <li>Relationship management</li> <li>Disclosure guidelines</li> <li>Communications</li> </ul>	
	Client Satisfaction Assessment Program				Member Satisfaction Assessment Program		Shareholder Satisfaction Assessment Program	



# Aanleiding (2015/2016)

- ▶ Strategisch plan 2020: dé autoriteit en dé gids voor consumenten te zijn op het gebied van wonen en leven.
- ▶ Beperking core systemen (legacy)
- ▶ Verwachte druk op verdienmodel
  - Nieuwe toetreders
  - Veranderd consumentengedrag
  - Online
- ▶ Start programma met als doel nieuwe klantproposities neer te zetten waarbij in het primaire proces alle applicaties vervangen worden.



**Met deze context, hoe zouden jullie dit aanpakken?**

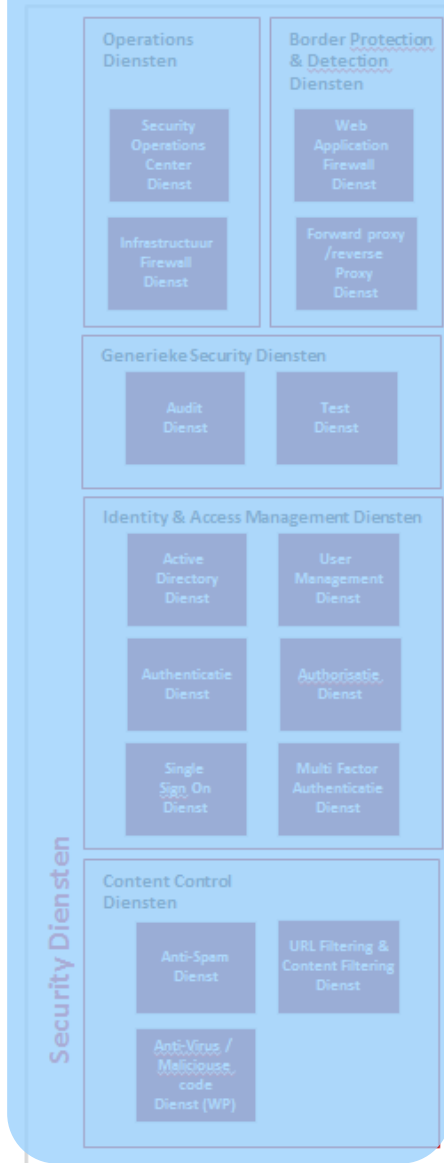
# SIAM/Outsourcing doelen

- ▶ Nieuw IT landschap: andere expertise en competenties
- ▶ Snelheid, zelf opbouwen van in-house kennis zou veel tijd kosten
- ▶ Verwachte druk op verdienmodel: schaalbaarheid
- ▶ Focus op core business bij DHA

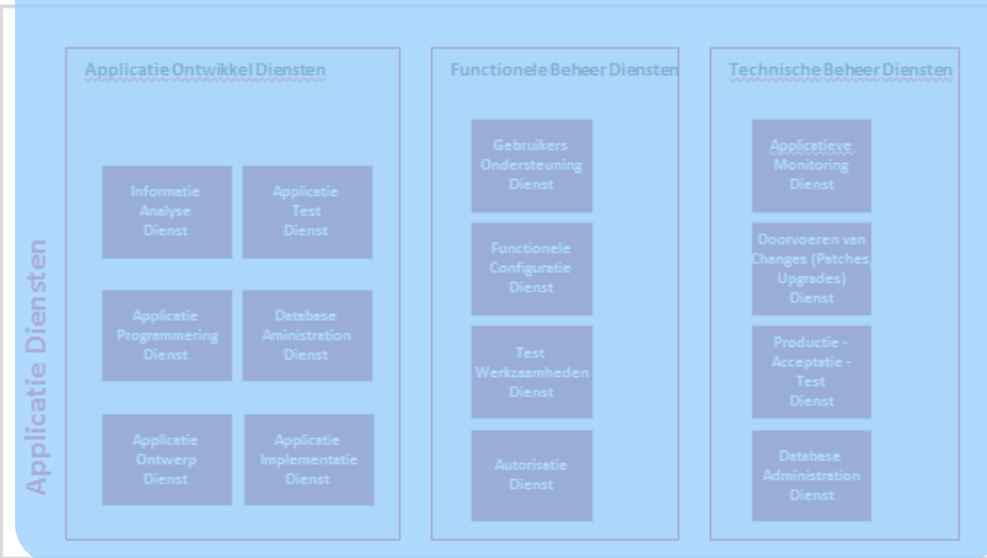


# Scope

## Security and IAM



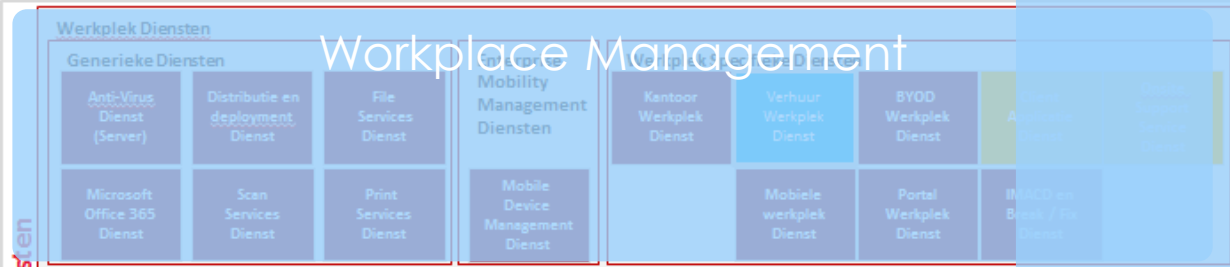
## Application Management



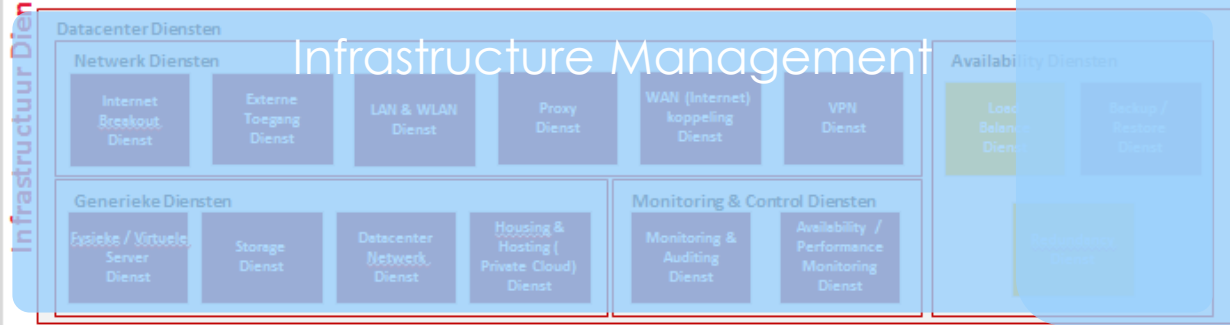
## Generic Services



## Workplace Management

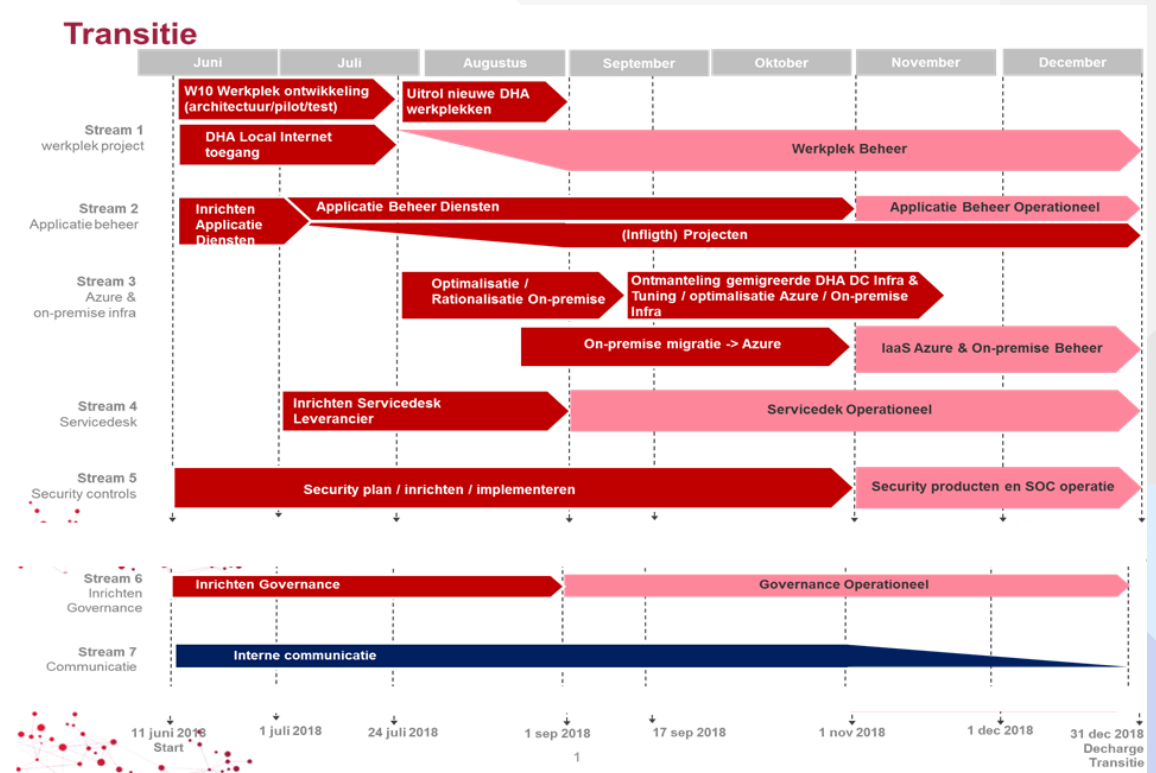


## Infrastructure Management



# Transitie

- ▶ Transformatie klantreizen en systeemlandschap onder aansturing van DHA in samenwerking met extern adviesbureau.
- ▶ Overgang van personeel
- ▶ Kennis overdracht: Socrates sessies
- ▶ Opstellen Third Party Management documenten
- ▶ Afstemmen tooling integratie 3<sup>e</sup> partijen



# Wat valt je op van het transitieplan?

# Timeline: de realiteit

## 2018 : 'BIG BANG'

- Major changes: Outsourcing, reorganization and complete transformation of application landscape
- Transition from partly inhouse software development, partly custom build software and full in house application management to **outsourcing most software development and application management to IT partners**
- Migration to **SaaS platforms** (CRM, DMS and mortgage advice platform)
- Extremely **downscaled IT organisation**
- Bare minimum of functionality at launch in 2018

## 2019/2020: 'BUMPY RIDE'

- Most of 2019 and 2020 have been dedicated to **solving incidents and problems** and ultimately replacing multiple components in landscape:
  - **DMS**: Alfresco -> Hyarchis
  - Replacing Citrix environment with working **fully cloud based** modern workplace
  - **Modernising** all hardware and work stations for best fit with technological and application landscape
  - **Stability** and improved **performance** attained by the end of 2020

## 2021: Business continuity

- Improving resilience by moving integration layer from on-prem BizTalk to **Azure Integration Services** (some p2p integrations still exist)
- Switching from traditional documents to **customer source data** in primary processes (Ockto)

## 2022: Future proofing

- **New Shareholder**: Grow, grow, grow
- **Re-assessing Customer Portal** Salesforce-based community to loosely coupled platform (lowcode or full code). Goals: better time-to-market, more flexibility in embedding new customer propositions. PoT (Proof of Technology) needed for low code alternative
- **Extending the use of CRM** from customer sales funnel to better support internal processes, like franchise management, compliance management etc. Goals: extending uniform processes, application rationalization and a way of standard reporting on these subject matters

**Wat zijn jullie lessons learned in  
vergelijkbare trajecten?**

# Lessons learned vanuit DHA

- ▶ Eerst transitie dan transformatie
- ▶ Opbouwen samen met de partij die ook het beheer gaat doen (focus niet alleen op budget en deadline)
- ▶ Neem de tijd voor deepdives op solutions
- ▶ Fade in fade out
- ▶ Veranderingen gefaseerd doorvoeren, ipv big bang
- ▶ Niet alle schepen achter je verbranden
- ▶ KPIs op applicatiebeheer en -ontwikkeling
- ▶ Stel oplossen van performance issues in de keten niet uit
- ▶ IT is mensenwerk

# Lessons learned CGI

Wat zouden we met de kennis van nu anders hebben gedaan

Starten met meer applicatieve “overhead” (Solution architect, technical specialists, security by design)

Samen met DHA 1 service window vastleggen met bijbehorende SLA & KPI's voor alle partijen in de keten

Rol opeisen bij ieder project binnen de hele DHA organisatie

Niet laten verleiden om operationele taken toch achter te laten bij DHA

Vasthouden aan monitoring standaarden, Bij tooling integratie is vooral de keten monitoring belangrijk. Zorg dat deze snel op orde is.

Niet te gretig zijn bij het aangaan van dit soort contracten

# Current challenges

- ▶ Revamp of contractual documents and terms is needed to better reflect current state of services and IT landscape (see next slide)
  - Alignment Support windows and 24/7 services and opening hours branches: Application mgt, Service Desk
- ▶ Currently considering extending the contract beyond current end date in 2023 to obtain OPEX savings.
- ▶ Additional KPIs needed to improve user satisfaction
- ▶ Make better use of CGIs experience and network: Architecture and innovation services are not resulting in added value yet



# Terms of contract

- ▶ No user experience KPIs (“XLA”)
- ▶ On site support not contracted for our branches, resulting in additional charges
- ▶ Application monitoring (integration and functional availability)
- ▶ Support windows not reflecting opening hours branches
- ▶ Other networking solution used then mentioned in contract (no zscaler)
- ▶ Other workplace concept than stated in service catalogues and SLA’s
- ▶ Functional support matrix not reflecting in house functional application mgt, primarily GARS and datawarehouse.

**Bedankt voor je aandacht.  
Heb je nog vragen?**

## **Maurits Denker**



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