

CASE STUDY

INTERNAL AUDIT MODERNIZATION: AGILE DIGITAL TRANSFORMATION ENABLEMENT FOR A MULTI-YEAR MAJOR PROGRAM

CLIENT CHALLENGE

- After studying the market for this major offering, the Audit Firm realized that every move was a “zero sum” game, and intended to grow the overall market with new innovations in products and delivery.
- The following areas were identified for the program: definition of new, innovative Internal Audit products, change of the delivery operating model, build of a global technology platform for projects, and development of an Intelligent Content Engine, using AI capabilities.
- A three year program was stood up, that included 11 countries (member firms) and was tasked to implement changes within three years.

ADVISOR INSIGHTS

- A lightweight agile approach combined with a right-size architecture governance capability keeps teams focused on incremental delivery without sacrificing “the big picture”.
- A tight integration between program strategy (what to sell), portfolio management / architecture (how do we get there), and program management/organizational change management is essential for leadership to “steer the ship”.
- An up-front investment in architecture “wires everything together”, simplifies communication, and increases transparency at every level of the program, including leadership / product owners, business experts, and technology specialists.

SNAPSHOT



Agile, Digital Transformation, EA



International Audit Firm



ARIS, JIRA, Agile Playbook

PAIN POINTS

Facing a zero-sum market, the firm needed innovative products and delivery methods.

RESULTS

- Enabled accelerated, transparent delivery with an Agile Playbook approach.
- Delivered a product-lifecycle managed catalog and associated business capability model.
- Coordinated 18 product/technology risk reviews across 11 countries.

RESULTS & BENEFITS

- Enabled accelerated and transparent delivery using an “Agile Playbook” approach and tools, aligning leadership, technical teams (UI/UX experts, software developers, infrastructure architects) with business, org. change, and marketing / operations teams.
- Delivered a product-lifecycle managed catalog (“what to sell”), and associated business capability model (“what is needed” to get there) and new service delivery processes (“how to operate”).
- Facilitated coordination of 18 product/technology risk reviews across 11 countries.
- Leveraging the capability model and processes, delivered best-fit technology solution options and roadmap, using a requirements evaluation process for COTS SW products and a multi-layer technology solution evaluation approach for “platform” infrastructure.

THE PROJECT

The project was ambitious and complex: new technology, new service operating models, and new organizational change / outsourcing models. In addition to typical needs for any digital transformation project (good leadership / communication, committed teams, and strong delivery), this program had the added complexities of “established legacy technology” culture vs. “leading edge technology” market demands, multiple countries / cultures requiring customized solution variants, and the stand-up of new operational support and sales teams.

Our EA team was brought in to provide leadership and integration at every level, using automated digital transformation tools (ARIS, JIRA) in combination with tailored “just enough governance” approach (Agile Playbook).