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## ACS RECOGNITION OF PRIOR LEARNING (RPL) FORM - 2017

This document is required to be completed for all **Recognition of Prior Learning (RPL)** applications and uploaded as a PDF to the application form.

**IMPORTANT NOTICE:**
*Misleading and false information is viewed as a major breach of ethical behaviour and will seriously jeopardise your migration prospects.*

*It is your responsibility to indicate when you have drawn on the work of others. Other people's original ideas and methods should be clearly distinguished, and other people's words, illustrations and diagrams should be clearly indicated regardless of whether they are copied exactly, paraphrased, or adapted.*

*Failure to acknowledge your source by clear citation and referencing constitutes plagiarism. All plagiarism will be assessed as not suitable and reported to the Department of Immigration and Border Protection.*

*The ACS reserves the right to use software applications to screen your submitted work for matches either to published sources or to other submitted applications. In some cases, you may be asked to submit project reports and other written work submitted with the application for screening by plagiarism detection services.*

*If at any stage in the assessment process plagiarism is detected, the information may be provided to other Australian Government agencies. The assessment will be terminated and the outcome recorded as unsuitable. A refund of the application fee cannot be provided for cases assessed as containing false information or plagiarism.*

**Please complete the following 2 sections:**
1. **The Key Areas of Knowledge – Section 1**
2. **The Project Report Forms – Section 2**

RPL applications are for those applicants who do **not** hold a recognised tertiary ICT qualification and who have a minimum of 6 years of closely related experience.

This document provides the opportunity for applicants to demonstrate the knowledge learnt throughout their professional experience.

| | |
|---|---|
| **Applicant Name** | ADHIKARA MUDIYANSELAGE SAJITH SUDARA ADHIKARI |
| **Applicant Email Address** | UNIT 12E, TOWER 10, CARMEL COVE, CARIBBEAN COAST, NO 1, KIN TUNG ROAD, TUNG CHUNG, NEW TERRITORIES, HONG KONG |
| **Applicant Date of Birth** | 02/08/85 |

# SECTION 1 – KEY AREAS OF KNOWLEDGE

Section 1 is based and will be assessed on the following document.  Please ensure you read and understand - The ACS Core Body of Knowledge for ICT Professionals (CBOK).

You must clearly explain how your experience and qualifications meet the selected Areas of Knowledge and specifically how and where you acquired the knowledge.

You are required to select one topic from the Essential Core ICT Knowledge (Topic 1 or Topic 2) and one topic from the General ICT Knowledge (Topic 3, Topic 4 or Topic 5).

Please ensure you address at least 2 subtopics from each of the topics chosen.

**The ICT Key Areas of Knowledge:**

**<u>Essential Core ICT Knowledge</u>**

Topic 1.    ICT Professional Knowledge
Sub Topics are -
   a.   Ethics
   b.   Professional Expectations
   c.   Teamwork Concepts and Issues
   d.   Communication
   e.   Societal Issues

Topic 2.    ICT Problem Solving
Sub Topics are -
   a.   Modelling Methods
   b.   Processes to understand problems
   c.   Methods and tools for handling abstraction

**<u>General ICT Knowledge</u>**

Topic 3.    Technology Resources
Sub Topics are -
   a.   Hardware and Software Fundamentals
   b.   Data and Information Management
   c.   Data Communications and Networking

Topic 4.    Technology Building
Sub Topics are -
   a.   Human Factors
   b.   Programming
   c.   Information Systems Development and Acquisition

Topic 5.    ICT Management
Sub Topics are -
   a.   IT Governance and Organisational Issues
   b.   IT Project Management
   c.   ICT Service Management
   d.   Security Management

ACS **AUSTRALIAN COMPUTER SOCIETY**

**Important:**
- **Identify the Area of Knowledge topic that you have chosen to explain by entering the name of the Area of Knowledge topic in the box.**
- **Explain, in the expandable typing area, how you have acquired the knowledge and illustrate the depth of that knowledge.**
- **You should NOT address all sub topics included in the Area of Knowledge in your explanation. Address at least TWO of the sub topics. Enter the sub topic name(s) in the box.**
- **Be clear and concise in your explanation.**
- **Limit each explanation to no more than one to one and a half pages.**

In the following expandable typing areas, explain **how you have acquired your in-depth knowledge** in these topic areas through your professional experience.

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**Essential Core ICT Area of Knowledge:**

Essential Core Knowledge
- Ethics,
- Professional Expectation
- Teamwork Concept and Issues
- Communication
- Societal Issue.

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How have you acquired this knowledge in your working environment? Illustrate your depth of knowledge.

**ICT Professional Knowledge**

Prior becoming an ICT professional I became a professional banker since year 2006 with HSBC, world's leading international bank who believes and respects the ethics and cultural values over 75 geographical locations in the world. As a result I've been following and practicing some of the sub topics mentioned under ICT professional knowledge even before I took over ICT BA role in year 2009 however the experience I've gained afterwards plus the knowledge added with my master's degree and project management professional enhancement it immensely.

**Professional Expectation**

As explained above, I started my career with HSBC in 2006 as a junior staff where I learnt that basics if professional expectation and exceled in no time. With promoting myself as the card operations officer is my very first experience of becoming a management staff of the bank where I was given the opportunity to put things I leant into practice. Guidance received from my mentors and senior management, professional trainings conducted by the bank, lessons learnt from the projects I've managed and learning from mistakes immensely helped me to become a master in this filed

Additionally professional expectation was a core pillar of my studies from following universities / institutes further helped me.
- ✓ IFS school of finance
- ✓ London School of Commerce
- ✓ Cardiff University
- ✓ Project Management Institute

With over twelve years of experience as a top performing professional banker working in multiple countries, working under many professional leaders, handling numerous projects/ initiatives locally, regionally and globally, learnings from mistakes and gaining lessons from professional educational institutes have made me a person who protects the professional ethics and expectations leading by example, encourages others to do so and overall protects the industry.

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**Teamwork Concept and Issues**

As a senior business analyst I have gained an exceptional experience in team working concepts and managing issues over the past twelve years primarily since year 2009 where I started to manage a team of my own. This was a great opportunity for me the learn how to lead a team by example, create the synergy levels of a team and how to move a team from forming stage to performing stage.

As the lead analyst I ensure y entire team attends a business review, gathering user requirements from business, meet IT and other stakeholders to evaluate the feasibility and prepare business requirement documents. Also they were encouraged to voice during brainstorming discussions as I firmly believe that innovation is the key to success. My team is also empowered to make decisions and relevant support is provided. I used to arrange daily scrum meetings and weekly progress review / governance meetings with my team to discuss the overall project status, challenges and finding out the possible solutions.

I also learnt that recognition is a ley motivational factor to have a strong team and numerous recognition programs incentivising financially, career progress, awards and accolades and empowerment were implemented. To have a strong team bonding is a paramount factor which I practice during office and after office hours with organizing bonding events. My team is distributed in few countries in Asia Pacific and is a diverse team with different backgrounds, ages experience levels. As a result respecting the different culturally values, perceptions, believes and views has immensely helped me to have a strong and top performing team.

Additionally, I recommended some vendor specific trainings/ certifications to my team to upgrade their ICT knowledge. Similarly, I also upgraded my academic and professional knowledge by taking Master degree in business administration. I definitely encountered some issues while working with my team for instance; pay raise, overtime allowances and leave issue which after a discussion I managed to resolve them.


**Communication**

I initiated several new projects while working with HSBC, during performing my functions as business analyst. I learnt and exceled myself in oral and writing communications as well as conducting meetings and providing presentations as business analyst to the consultants. With department heads, I had to schedule meetings to jot down their department's need.

In the same manner, while finalizing the internal needs, external contractor's co-ordination to provide the association's business needs, best-fit production selection in the business requirement light were my key roles. Moreover, I also enhanced my interpersonal skills, which was because of the presentations which I gave to the managers and clients. Without that, it was not possible for me to deal with people.

**Societal Issue**

When I was working with HSBC, I was actually involved in the process of learning and then aggressively addressing the societal issues. Corporate email is configured on cell phones as ICT is everywhere these days. A huge responsibility was on my shoulders to protect the sensitive data of association.

## General ICT Area of Knowledge:

How have you acquired this knowledge in your working environment? Illustrate your depth of knowledge.

**Security Management**
As a professional banker and a responsible leader of the organization I perform all my tasks keeping information security and protecting banks reputation in the heart of my strategy. As the key link between business users and IT system developers my role is critical to manage the security of the information fed from the core banking system. Classic example of such effort would be "encrypting the email statement" with a strong password (project is well explained in section 2) considering the content of the statement would be sensitive data belongs to customers. Knowledge from PMP certification and the relevant MBA module (business risk) immensely helped me to gain the granular understanding of the security management plus

working for the world's leading international bank for over twelve years  security management has become a part of my core value and always given the priority at the time of gather business requirements, analysing and testing the solution architecture

**IT Project Management**

Since year 2009 I became a part of banks IT transformation / project management team and the experience I've gained for the past nine years in managing projects is enormous. I got to know so many new technical things during this entire tenure and learnt IT related facts which further strengthen my knowledge in the area.

Project management professional learnings.

**IT Governance and Organisational Issues**
I sorted well all the IT Governance and organizational related issues which solved all the problems related to IT in the project as well as in the firm. There were few organizational issues which were also sorted by me to successfully executing the project. With the current c-word, institute effective IT governance needs dealing with it. The company culture and the way we do things also derives an effective solution to the numerous problems related to it. The attitude that "information is power" enhance the confidence of employees to further seek opportunities and deliver power. In most cases, management is evaluating each project closely and give their output to it.

## SECTION 2 - RPL PROJECT REPORTS

A project report is a clear written description of a project or engagement that provides you with the opportunity to show how you perform as an ICT Professional.

Each report is to relate to a significant project or work episode undertaken by you during your professional ICT career.

The purpose of these reports is to enable you to demonstrate your command and implementation of the Areas of Knowledge described in Section 1 of this application.

**Please Note: You are required to provide two project reports.**

Of the two reports, one must apply to a project undertaken within the last three years, and the other for a project within the last five years.

**Projects over two years long may be used for both reports under either of the following conditions:**
- **The project has clearly-defined work efforts which took place in parallel, each with their own solution development and design activities and their own deliverables.**
- **The project had clearly-defined phases that were executed in succession, each with its own solution development and design activities and deliverables. Note that a second project**

**phase that constructs and implements the solution developed by the first phase does not meet this requirement.**

Depending on the nature of your role in each project, the Project Report should cover an appropriate selection of factors.

Appropriate factors will be determined based on the type of ICT project selected. Possible factors include:

- System Analysis and Design and Software Engineering methodologies used;
- Contribution to the processes involved in the design and implementation of enterprise-wide computing systems;
- Programming languages, design paradigms and implementation procedures adopted;
- Database and/or file design and management techniques employed;
- Network topologies, including size, distribution and security facilities installed;
- Project Management and quality assurance techniques followed;
- Internet application design, including database interactivity and security measures implemented;
- ICT managerial activities, demonstrating the nature and extent of responsibilities

| Project Summary: | | | |
|---|---|---|---|
| | **Project Name** | **Start Date** | **End Date** |
| **Project 1** | **Project Hermes – Statement Email Statement Delivery project** | **11/13** | **09/14** |
| **Project 2** | **Expansion of credit card life cycle** | **08/16** | **05/17** |

**Instructions**

**The following pages provide a template for your reports.**

When writing your reports please provide your own thoughts – do not just copy project documentation.

Please use the first person in your discussion, so it is clear to the assessor what you did versus what others did – say "I did X" rather than "X was done".

Diagrams from the project documentation may be helpful, but the text should be in your own words. Please ensure that diagrams are relevant, readable, and help the assessor to understand what you did as a member of the project team.

If sections of the Project Report template (see below) are not relevant to your participation in the project, then leave the section blank.

Focus on quality rather than quantity. **Each Project Report should be no more than four or five pages in length.**

**SPECIAL NOTE:**

By submitting this RPL Knowledge and Project Report form as a component of your ACS skills assessment application, you agree with the following statement:

*The applicant confirms that the explanation of their knowledge and project reports submitted in this application truthfully and accurately describe the applicant and the applicant's personal involvement in the projects. The applicant is aware that plagiarism by the applicant will automatically invalidate this application, will jeopardise any future applications from the applicant and will be reported by the Australian Computer Society to the Australian Department of Immigration and Border Protection.*

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| Project 1: < Project Hermes – Customer Correspondence Email Statement Delivery project > |
| --- |

## 1. Project Summary

### 1.1. Identification

| Client's Company Name | HSBC Sri Lanka | |
| --- | --- | --- |
| Business Address | PO Box 73, 24, Sir Baron Jayathilaka Mawatha, Colombo 1, Sri Lanka | |
| Contact Numbers | Tel: +94 112325435 or +94 112446591 | |
| Web Address | www.hsbc.lk | |
| Email Address | sudara.adhikari@hsbc.com.hk / annperera@hsbc.com.lk | |
| Nature of project | Digitizing customer correspondence from paper to email | |
| Location of project | Sri Lanka | |
| Name of your employer | HSBC Sri Lanka | |

### 1.2. Duration

| | From | To |
| --- | --- | --- |
| Total project duration | 11/13 | 09/14 |
| Your involvement | 11/13 | 09/14 |

### 1.3. Resources

| | Number |
| --- | --- |
| Your team size | 07 |
| Total project team size | 18 |

### 1.4. Personal Involvement

*Please list the phases of the project in which you were personally involved*

| Start | Completion | Phase Description |
| --- | --- | --- |
| 11/13 | 01/14 | Initiation – Review the business opportunities gather business requirements |
| 01/14 | 03/14 | Planning – Stakeholder approval, documentation preparation, resources arrangement |
| 03/14 | 07/14 | Execution – Solution development, system acceptance test, user acceptance test and integration |
| 07/14 | 09/14 | Controlling and closure – End user training, pre implementation and go live |

### 1.5. Describe your role(s) and responsibilities in the project.

Following were the main roles and responsibilities which I performed:

- I worked in collaboration with business stakeholders/partners to review the existing processes & procedures.
- I identified the inefficiencies of the current practice, system performance, behaviour & recommend the process streamlining/improvement opportunities.
- I acted as the key point of contact with operations, IT and business stakeholders to gather, analyse and document the business and functional requirements.
- Moreover, I worked with system architecture development and software development teams to determine the feasibility of the business requirements captured in the business requirement document.
- I worked with the risk and legal stakeholders to ensure business requirements points are aligned with bank's policies and regulatory requirements.
- I ensured system development alignment with the project scope and escalated any deviation with the project steering committee.
- I was involved in the system acceptance tests, worked closely with business users to prepare the user acceptance test cases, execute them and results validation.
- I worked closely with IT & business users to manage any system defects/gaps identified
- I prepared and developed training material and aids such as procedure manuals, staff communications and supporting training reference documentation.
- I communicated, educated and liaised with users and management to ensure awareness and adherence to standards, procedures and quality control issues and activities.

## 2. Business Opportunity or Problem

### 2.1. Describe the business opportunity or problem(s) this project addressed.
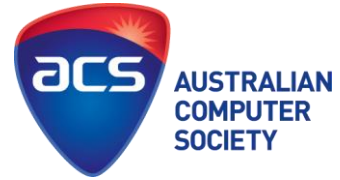
Customer correspondence delivery to customers on a periodical basis (mostly on a monthly basis) is a primary operation in HSBC Sri Lanka incurring a significant cost of the bank's annual operating plan. Majority of the correspondences are delivered via postal service while minimal amount of customers are using internet banking services. As a result of bank experienced number of challenges which are

- ✓ Poor customer experience
- ✓ Higher operations cost
- ✓ Longer period of time to deliver correspondences (usually 3 – 5 days)
- ✓ Insecure mode of delivery
- ✓ No tracking of correspondences once dispatched to postal service

Solution I proposed is to convert the customer correspondences from paper to email correspondences for customers who have registered email addresses in bank's core banking system. This approach is supported by the bank's senior management since most of the customers have valid email addresses already and bank mandated to have an email address for customers who joins the bank as new customers.

Key benefits of this solution
- ✓ Speedy and secure delivery of customer correspondence
- ✓ Enhance customer experience
- ✓ Significant savings to the bank
- ✓ Addresses the business problem
- ✓ Go green initiative which promotes paper reduction
- ✓ Improvement staff efficiency and process automation

## 3. Solution

### 3.1. Discuss your contribution to the solution, project or engagement.

Business problem statement is presented to me by the retail banking senior management with the intention of exploring an alternative option. Based on my analysis of the current market practices locally, regionally and globally plus understanding the country regulatory requirements plus customer preferences I initiated the feasibility study to move the correspondences from paper to email solution cohesively with IT, Operations, business, risk and legal teams.

This project involved a process flow migration from paper to digital platform which required myself to analyse the weaknesses of the current solution as well as how the new solution should function, opportunities available by understanding the different types of the customer segments, system performances and user requirements.

Following are the data modelling techniques I've used to determine above.

**Entity Relationship Diagrams** (ERDs) to understand the relationships between business concepts,
**Data Dictionary** to work with the stakeholders to gather/document requirements
**Data mapping** to understand data related issues and
**Data Flow Diagram (DFD)** which helped me to determine the information flow from current solution to the new solution and what the gaps are and how to overcome the same.

Once the opportunity and process flow is determined using above techniques I contributed in following ways for the success of this project.

- Working in collaboration with business stakeholders/partners to review the existing processes & procedures.
- Identifying the inefficiencies of the current practice, system performance, behaviour & recommend the process streamlining/improvement opportunities.
- Applying project management methodologies, tools & techniques to develop the project charter, business case, and functional specifications & resources allocation.
- Working cohesively with the business users to develop the test scripts/plans, ensure quality testing which was conducted & successful system integration & deployment takes place.
- Conducting pre-implementation dress rehearsal validations, post implementation health checks and ensure system performance is up to the standards in production.
- Preparing of procedure manuals, create user awareness by conducting user training prior system production implementation.
- Acting as the central point of contact of the project which will provide the regular updates, escalate any issues, coordinate testing & defect management activities and responsible of successful solution deployment.

### 3.2. Describe any design or problem solving methods you used on this project.

I've encountered an issue during the project system acceptance and user acceptance tests where the solution was not compatible with certain devices which is listed as a critical defect required immediate action. This was a show stopper to the entire project since compatibility to all the devices/operating systems available in the market was one the primary requirement listed in the business requirement document by the sponsors.

I used following approach to resolve this defect/issue.

1. Understanding the problem – First step of the problem solving journey where you need to understand what the real problem is. In this case, what are types of devices, operating systems, email service providers and internet service providers were taken as the key benchmarks to determine the problem.
2. Understanding the causes – Using Fishbone diagrams and a deep dive analysis is performed to see the cause and effect and shortlist the most critical factors we need to address.
3. Brainstorming – All the key stakeholders and technical experts were requested to attend this session with the intention of generating ideas/possible solution we have at hand to manage this solution.
4. Selecting the best – Once the list of ideas were generated, shortlisting was performed based on the cost, schedule and customer impact for each proposal. This approach helped me to rank each proposal and finally to select the best approach from the list.
5. Implementation – Next step was the development of the fix and implemented in test environment for different scenarios and many cycles to ensure that we cover the entire project scope and all stakeholders' gets comfortable with the performance post fix deployment.

### 3.3. List the major deliverables of the project that you were responsible for or contributed to.

Major deliverables of the project I was responsible for or contributed are

- ✓ Understanding the current process, its areas for improvement by using data modelling techniques, voice of customer and discussions with SMEs.
- ✓ Work with the business users to prepare the business requirement document, solution development team to determine the feasibility and other relevant stakeholders to obtain approvals.
- ✓ Ensuring the solution development which is on track and as per the scope
- ✓ Leading the UAT with business users ensuring by preparation of test cases, execution and validation and ensuring entire project scope which is tested with zero defects prior releasing it with the production
- ✓ Preparation of procedure manuals and conducting adequate user training on the new solution
- ✓ Ensure full integration of the solution, further validate the performance in pre-production using mocks / dress rehearsals and smooth transition of the solution into production

## 4. Results
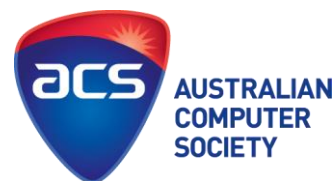
### 4.1. Was your solution implemented? If so, describe the role, if any, you had in the implementation.

Solution is successfully implemented in August 2014 for HSBC credit card customers in Sri Lanka and later it is implemented in six more countries which are Singapore, Malaysia, Indonesia, Philippines, India and China.

As one of the pioneer staff who involved in this project from idea generation to production implementation I played from inception to completion. Primary during the project implementation following are the key roles I've played.

1. Critical thinker
   During the implementation there were number of system defect were experienced with certain internet explores, password combination and data transfer lag from core banking system to business solution. During these issues I as the lead analyst and the initiator of the project used critical thinking, alternative ide generation, testing and implementation into practice to resolve the issued experienced.

2. Communicator
   During the SIT, UAT and other implementation activities I provided regular updates to the project manager on the progress that IT development team is making against the project schedule, cost & scope. Also during the implementation I worked closely with end users to prepare the procedure manuals, user trainings and working as the subject matter expert of the solution.

3. Subject Matter Expert (SME)
   Since the project is the global pilot for HSBC as well as first in the country, numerous stakeholders (bank local, regional and global senior management plus competitors, regulator and others), there was huge pressure to ensure that project does not fail in any metric. As the key staff who initiated and worked with the stakeholders to develop the solution I became the project SME taking the responsibility of handling business queries, supporting end users and ensure business continuity remains up to the standards.

**4.2.** *Assess the overall success or failure of the project.*

**Solution at a glance**



Overall solution was a key success of HSBC and later it became a part of the regional roll out strategy of the bank. Solution managed to provide following benefits to bank's customers.

1. **Higher customer experience**

   It was an innovative solution and a unique experience to customers in Sri Lanka where they received their statements in a simpler, faster and better way.

2. **Simpler, faster and safer solution**

   Correspondences are delivered to customers email address as a password encrypted password document which is much secure, deliver the correspondence within 24 hours which is faster than the postal service and most importantly increase the customer experience.

3. **Sustainable cost savings**

   This solution / initiative became of the highlight of the year delivering over 50% of the savings targets as a single project and later replicated across the Asia Pacific region delivering significant benefits.

4. **Track the delivery performance**

   Bank will be in a position to keep a track of the correspondence delivery and make arrangements to take follow-up action in the event of a customer not receiving the email correspondence which is a far better approach than postal delivery.

5. **Improve the overall operating efficiency**

   As a result of moving correspondence from paper to "e" solution, operations staff are no longer required to manager return handling process resulting more productivity within Operations.

6. **Replication**

   Overall solution is deployed in another six markets which are Singapore, Malaysia, Indonesia, Philippines, India and China for many customer correspondence products providing all above benefits for a wider group of customers.

### 4.3. Lessons Learned

*In retrospect, what you might have done differently on this project?*

Post successful implementation of the project a Project Implementation Review (PIR) is conducted where we as a team revisited the following components
1. Project approach
2. Project cost and schedule
3. Stakeholder feedback
4. Customer experience on the solution
5. Benefits validation

During the PIR, while appreciating the hard work and innovation made by the team it is also noted that following areas might have done differently to make the project even better

1. Regular communication amongst the stakeholders
   It is noticed that during the project initiation, user requirements validation and integration stage more clear and frequent communication would have helped to keep all stakeholders aligned on the progress

2. Customer experience
   As a part of the solution we used a static password however customer experience and feedback survey revealed that if the solution is presented with a dynamic password or an option for customers to change the password at their wish would have even increase the customer experience.

3. Project resources
   It is also noted that a clear RACI matrix agreed amongst all stakeholders at the beginning of the project would have helped all stakeholders to agree on the roles and responsibilities and no disputes in the midst of the project.

4. Business As Usual (BAU) support (Post Implementation)
   Voice of customers of the production users confirmed that the BAU operation would be smooth if we arranged IT support team to handle the technical queries raised by customers. While I played the role of business SME, I should have keep a resource from IT to handle technical queries until system achieves BAU.

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### 5. Project Summary

#### 5.1. Identification

| | |
|---|---|
| Client's Company Name | HSBC Global Services Limited, Malaysia |
| Business Address | 7<sup>th</sup> floor, Bursa Malaysia Exchange Square, Jalan Bukit Kewangan, 50200, Kuala Lumpur, Malaysia |
| Contact Numbers | +60 321732000 | |
| Web Address | www.hsbc.com.my |
| Email Address | Sudara.adhikari@hsbc.com.hk or einnanuar@hsbc.com.my |
| Nature of project | Expansion the life cycle of the credit cards issued in Asia Pacific countries |
| Location of project | Malaysia |
| Name of your employer | HSBC Global Services Limited, Malaysia |

#### 5.2. Duration

| | From | To |
|---|---|---|
| Total project duration | 08/16 | 05/17 |
| Your involvement | 08/16 | 05/17 |

#### 5.3. Resources

| | Number |
|---|---|
| Your team size | 10 |
| Total project team size | 23 |

#### 5.4. Personal Involvement

*Please list the phases of the project in which you were personally involved*

| Start | Completion | Phase Description |
|---|---|---|
| 08/16 | 09/16 | Initiation – Understand business problem and collect requirements |
| 09/16 | 13/16 | Planning – Interlock the requirements with stakeholders and business case approvals |
| 11/16 | 03/17 | Execution – Solution development, testing and integration |
| 03/17 | 05/17 | Controlling & Closure – Defect management, training, procedure preparing, pre-implementation and go live. |

#### 5.5. Describe your role(s) and responsibilities in the project.
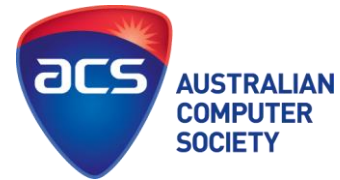
- Analyzing the current solution, its weaknesses / areas for opportunities, listen to voice of customers and gather business requirements from various stakeholders.
- Applying project management methodologies, tools & techniques to develop the project charter, business case, functional specifications & resources allocation
- Working cohesively with the business users to develop the test scripts/plans, ensure quality testing is conducted & successful system integration & deployment takes place.
- Conducting pre-implementation dress rehearsal validations, post implementation health checks and ensure system performance which is up to the standards in production.
- Preparing of procedure manuals, create user awareness by conducting user training prior to the system production implementation.

Acting as the central point of contact of the project which provide the regular updates, escalate any issues, coordinate testing & defect management activities and responsible of successful solution deployment.

## 6. Business Opportunity or Problem

### 6.1. Describe the business opportunity or problem(s) this project addressed.

Credit cards manufacturing is one of the significant cost contributor at HSBC Malaysia and all other countries and this process involves card embossing, personalization, stationary and delivery costs. All cards issued has a life span based on the regulatory and card issuing organizations directions and the purpose of this project is to enhance the life cycle of the cards issued by the bank with aligning to the standard guidelines as well as evaluating the technical feasibility of the solution.

Key benefits of this solution
- ✓ Reduction in cards operating cost
- ✓ Better customer experience
- ✓ Sustainable cost savings
- ✓ Addresses the business problem
- ✓ Go green initiative which promotes paper reduction
- ✓ Operations efficiency gains

## 7. Solution

### 7.1. Discuss your contribution to the solution, project or engagement.

This project involved in extensive testing of the system compatibility, connectivity with card authorization bodies, merchants who are using Point of Service(POS) machines as well as online payment solutions and reconciliation bodies under the guidance of country's regulatory teams.

As the lead analyst of this project my first step was to understand business requirements and asses the technical feasibility of the requirements proposed. Also I performed a situational analysis of the current solution and to be solution to present what the solution architecture should be.

My other contributions towards the solution were

- Analyze the current solution, its weaknesses / areas for opportunities, listen to voice of customers and gather business requirements from various stakeholders.
- Applying project management methodologies, tools & techniques to develop the project charter, business case, functional specifications & resources allocation
- Work with system development teams to ensure data flow, system connective with associated platforms are not disturbed and integration takes place as per the business requirements.
- Working cohesively with the business users to develop the test scripts / plans, ensure quality testing is conducted & successful system integration & deployment takes place.
- Conducting pre-implementation dress rehearsal validations, post implementation health checks and ensure system performance is up to the standards in production.
- Preparing of procedure manuals, create user awareness by conducting user training prior system production implementation.
- Acting as the central point of contact of the project who will provide the regular updates, escalate any issues, coordinate testing & defect management activities and responsible of successful solution deployment.

*7.2. Describe any design or problem solving methods you used on this project.*

During the execution of the project implementation activities, a major defect is encountered where a core functionality of the solution was not functioning as part of the design/architecture failure.

I as the lead analyst used the design thinking process to resolve this solution which is explained below.

1. Define – This stage focuses on clearly understanding what the problem is. Better you understand it more chances of getting the right solution. Hence I gathered all my team and other technical teams to clearly document what the problem is.

2. Research – Second step of the journey where you do more investigation of the problem. Data modelling techniques such as Pareto analysis & fish born tools were deployed to more research and understand the root cause of the problem.

3. Ideation – During this stage we as a team got together and generated ideas until we arrived to the most feasible five ideas from the scope, schedule and cost perspective

4. Prototype – Solution development teams prepared simulations in test environment where we evaluated the performance of each solution with end users.

5. Selection – Based on the feedback from the end users experience and technical teams guidance we have selected the most suitable approach to proceed further

6. Implementation – Deploying the fix and integrating the same with the core solution was performed during this stage

7. Validate – Further validation performed as a total solution post deploying the fix and to ensure that system performing 100% accurate from end to end with no gaps.

### 7.3. List the major deliverables of the project that you were responsible for or contributed to.

Following are the major deliverables of the project:

1. I worked in collaboration with business stakeholders / partners to review the existing processes & procedures.
2. Identifying the inefficiencies of the current practice, system performance, behaviour & recommend the process streamlining / improvement opportunities.
3. I used project management methodologies, tools & techniques to develop the project charter, business case, functional specifications & resources allocation
4. Worked cohesively with the business users to develop the test scripts / plans, ensure quality testing is conducted & successful system integration & deployment takes place.
5. Conducted pre-implementation dress rehearsal validations, post implementation health checks and ensure system performance is up to the standards in production.
6. Prepared procedure manuals, create user awareness by conducting user training prior system production implementation.
7. I was also responsible of being the central point of contact of the project who will provide the regular updates, escalate any issues, coordinate testing & defect management activities and responsible of successful solution deployment.

## 8. Results

### 8.1. Was your solution implemented? If so, describe the role, if any, you had in the implementation.

Expansion of credit card life cycle is successfully implemented in HSBC Malaysia and recognized as the replicable initiative and later implemented in Singapore, Sri Lanka, Philippines and Indonesia

As the lead business analyst of the project my role in this project implementation was crucial in following areas.

1. Problem solving role
   As the backbone between business and IT stakeholders my ability of solve the challenges were critical and facilitation to identify the right / most feasible solution amongst many is highly appreciated by senior management.

2. Analytical role
   As a ICT business analyst I have developed an eye which can see / notice the gaps in a process, review a group of data visualize them and understand their patterns, use my six sigma skills and understand customer pain points and analyse the business requirements and work with IT engineers to implement the solutions.

3. Communication and integration
   Prime role I've played during the project to ensure all stakeholders are aligned and are aware of the progress made on a regular basis. Also I managed to ingrate all the IT work streams together during the development and testing phases and ensured that project schedule is on track.

4. Documentation
   Understanding the business requirements from business teams, working with IT teams to understand the technical feasibility and documenting them into the business requirements documentation is another key role I've played. Additional I used to document the functional specifications of the new solution by working with all stakeholders and trained the end users before the solution went live.

### 8.2. Assess the overall success or failure of the project.

Overall project was a great success by many parameters which are

1. **Customer experience**
   Overall this project helped increase the customer credit card validity and usability and as a result customers are no longer required to receive new cards within a shorter period of time. This was great experience for customers where they do not have to change their standing instructions (SI's) give to utility and other bill payments and receiving additional PINs.

2. **Significant cost savings**
   As a result of this initiative bank managed to save the cost in many ways which are
   - ✓ Reduction of card embossing and personalization cost due to higher life span
   - ✓ Reduction of card delivery cost

3. **Improve bank staff productivity and efficiency**

4. **More opportunities to replicate**
   This initiative is replicated in four more countries in Asia Pacific region of HSBC delivering higher benefits and better customer experience for a wider audience.

5. **Alignment with regulatory and card issuers guidelines**

### 8.3. Lessons Learned

*In retrospect, what you might have done differently on this project?*

Similar to project 1, a Project Implementation Report (PIR) is conducted by the project team including myself to understand on following sub topics.
- ✓ Project success factors
- ✓ What could have done betters
- ✓ Project failure areas
- ✓ Customer feedback
- ✓ Recommendations for future implementations

Under "what could have done better" section following points were noted under the tasks I've managed.

1. Business requirements gathering
   It took relatively longer period to finalize the business requirements between IT and business users to miscommunications / conflicts. If this could have avoided in the beginning of the project it was revealed that overall project implementation could have completed 3 weeks prior to the actual completion date.

2. User training on the system
   Feedback received from the end users that class room training could have more effective instead web-ex training which I've conducted before system implementation.

3. Parallel run of testing activities
   Also it is learnt that if the project took more an agile approach where identifying the test cases which are not on critical path and run the system integration test and user acceptance tests together which also would have helped reduce the project life cycle by two weeks.