RBS
The Royal Bank of Scotland

Websphere Portal and Lotus Web Content Management adoption and Project best practices at the Royal Bank of Scotland Group

Websphere User Group, 28th September 2010

Author: Simon Stone

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Purpose: For information only

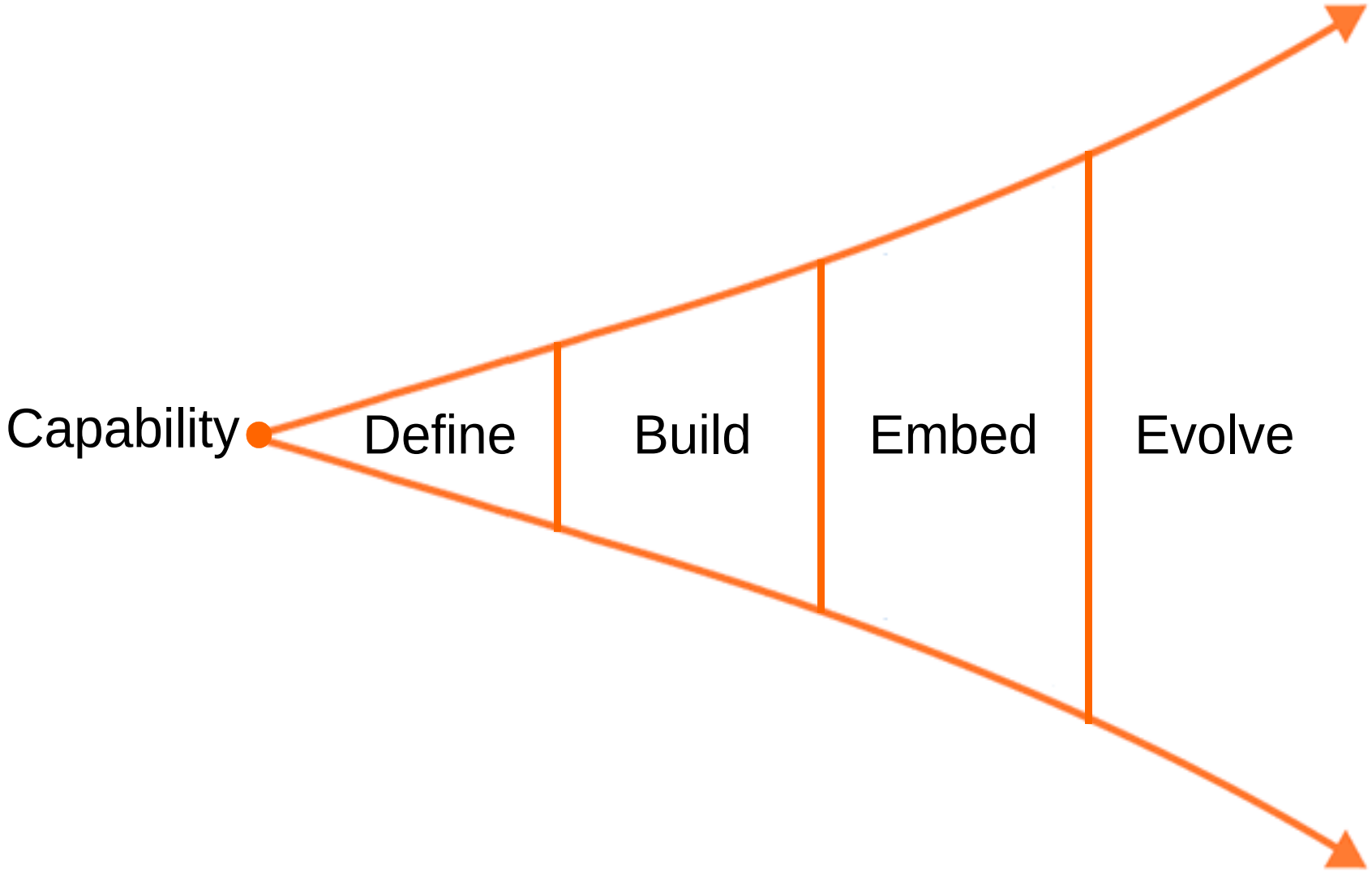
Agenda

- Background – An Introduction to the RBSG Portal Adoption Programme
  - Portal: Why now for RBS?
  - Our Portal Journey
  - Our Projects
- The Portal Operating Model Best Practice Approach
  - Why do we need it?
  - Defined
  - At the heart of change
  - Governance, Control & Flexibility?
  - The Change Lifecycles & Workflows
  - Other Considerations
- Project focus - The RBS Group Intranet Portal
  - Background
  - Personalised News Demo
  - Category Select Workflow Demo
  - The Vision for the Group Intranet Portal

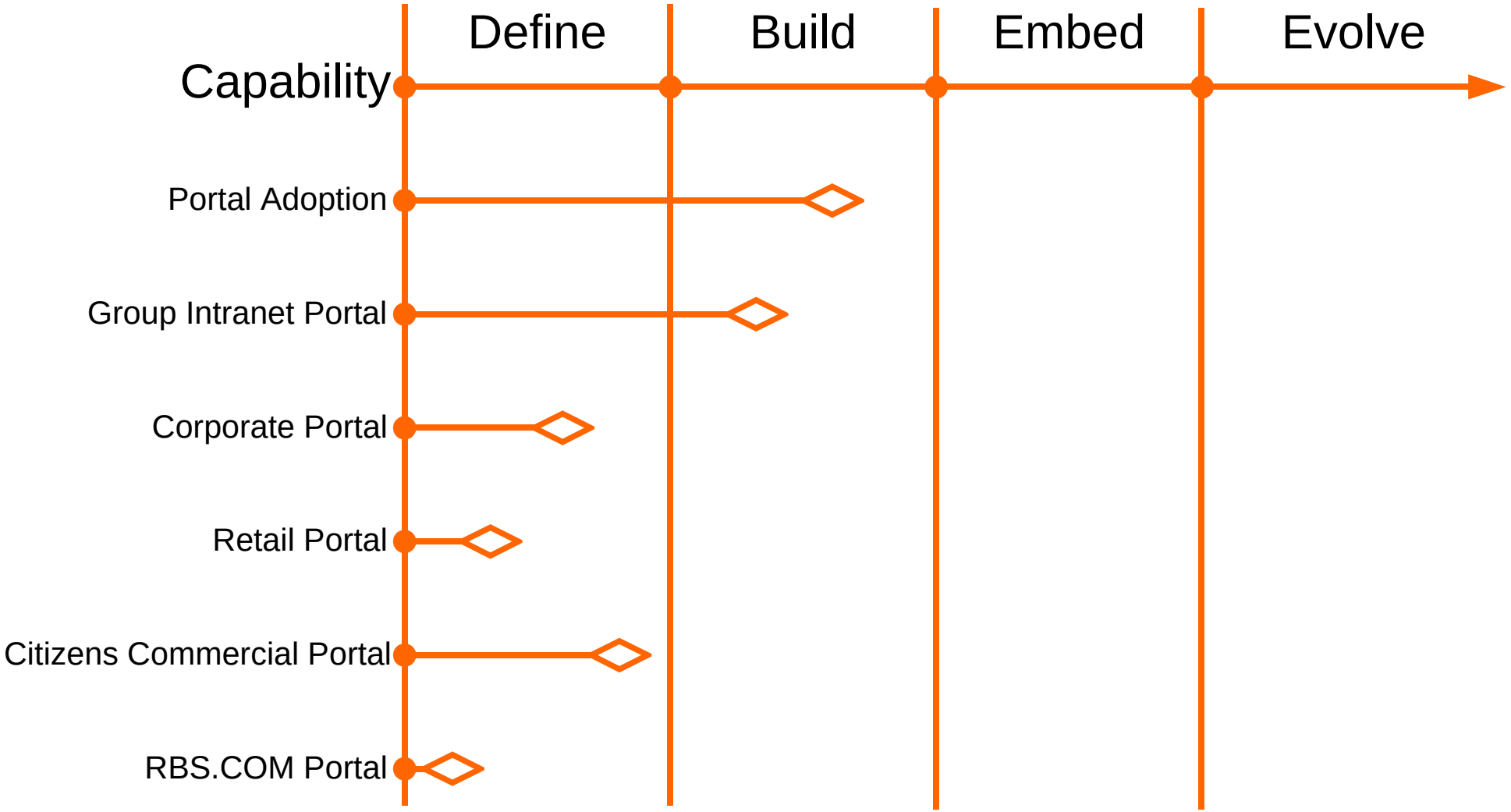
Portal: Why Now for RBS?

- To Optimise the way we engage with our Customers & Staff
- To Realise the potential of our existing Technology
- To Build value added capability
- To Drive greater organisational efficiency
- To Support Restructuring, Re-building and Recovery
- To Enable us to respond quickly to an ever changing banking climate
- To Deliver an *"Exceptional Web Experience"*

Our Portal Journey



Our Projects



The Portal Operating Model Best Practice

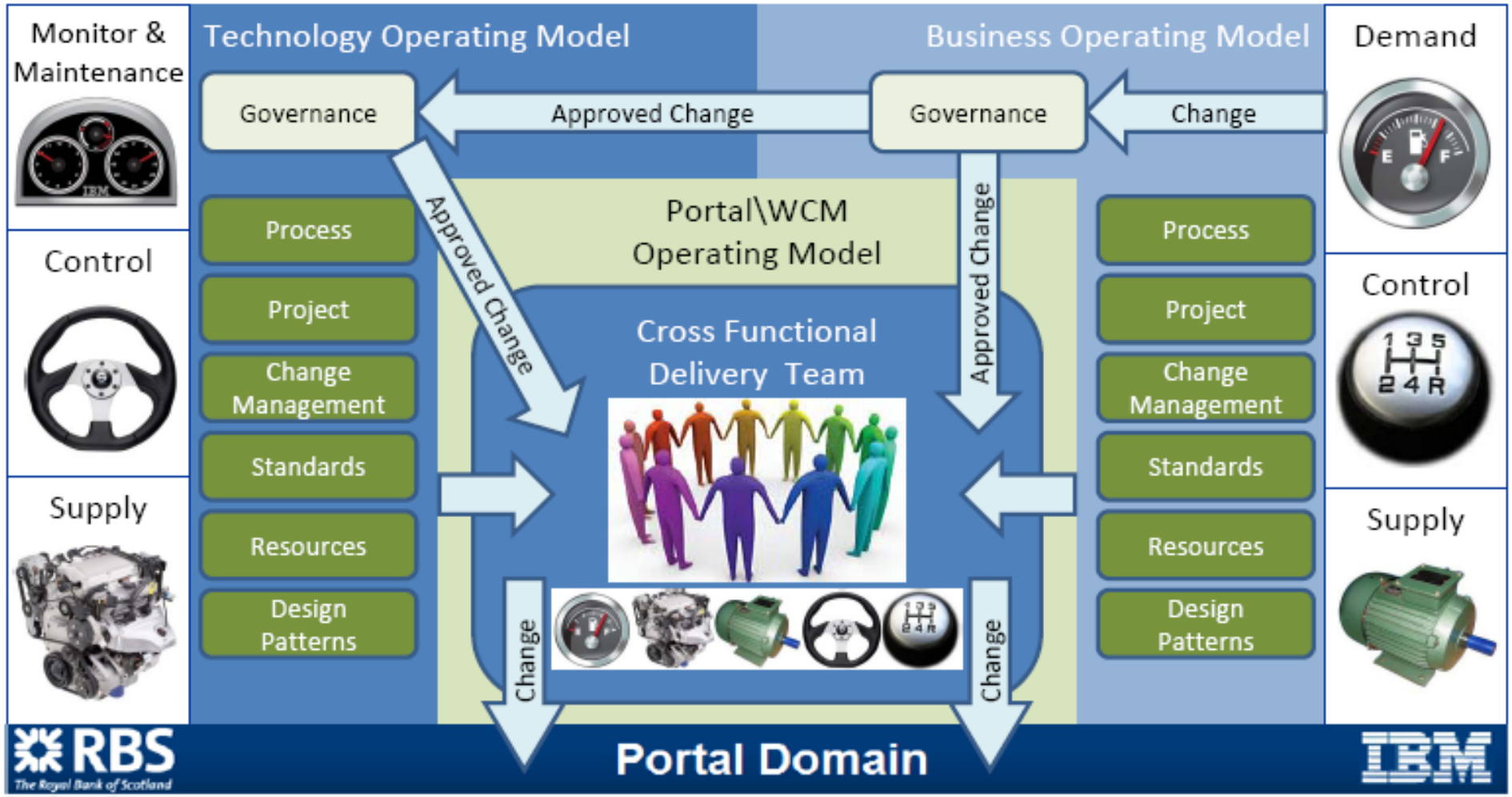
So why did we decide to define a specific operating model for Portal?

- To support cross functional development
- To provide scalable change control, appropriate to the risk
- To deliver greater flexibility & improved time to market
- To provide greater visibility of change
- To support the diversity of stakeholder interests
- To deliver certainty of change
- To allow us to build and evolve capability

The RBS Portal Operating Models - Defined

- The ***Business Operating Model (BOM)*** is the governance and control process for business change events associated with the management and administration of content, configuration and web design.
- The ***Technology Operating Model (TOM)*** is the governance and control process for technology change events associated with the management and administration of code, configuration and application design.
- The ***Portal Operating Model (POM)*** is the governance and control process for managing change to Portal and WCM artefacts by both the Business & Technology.

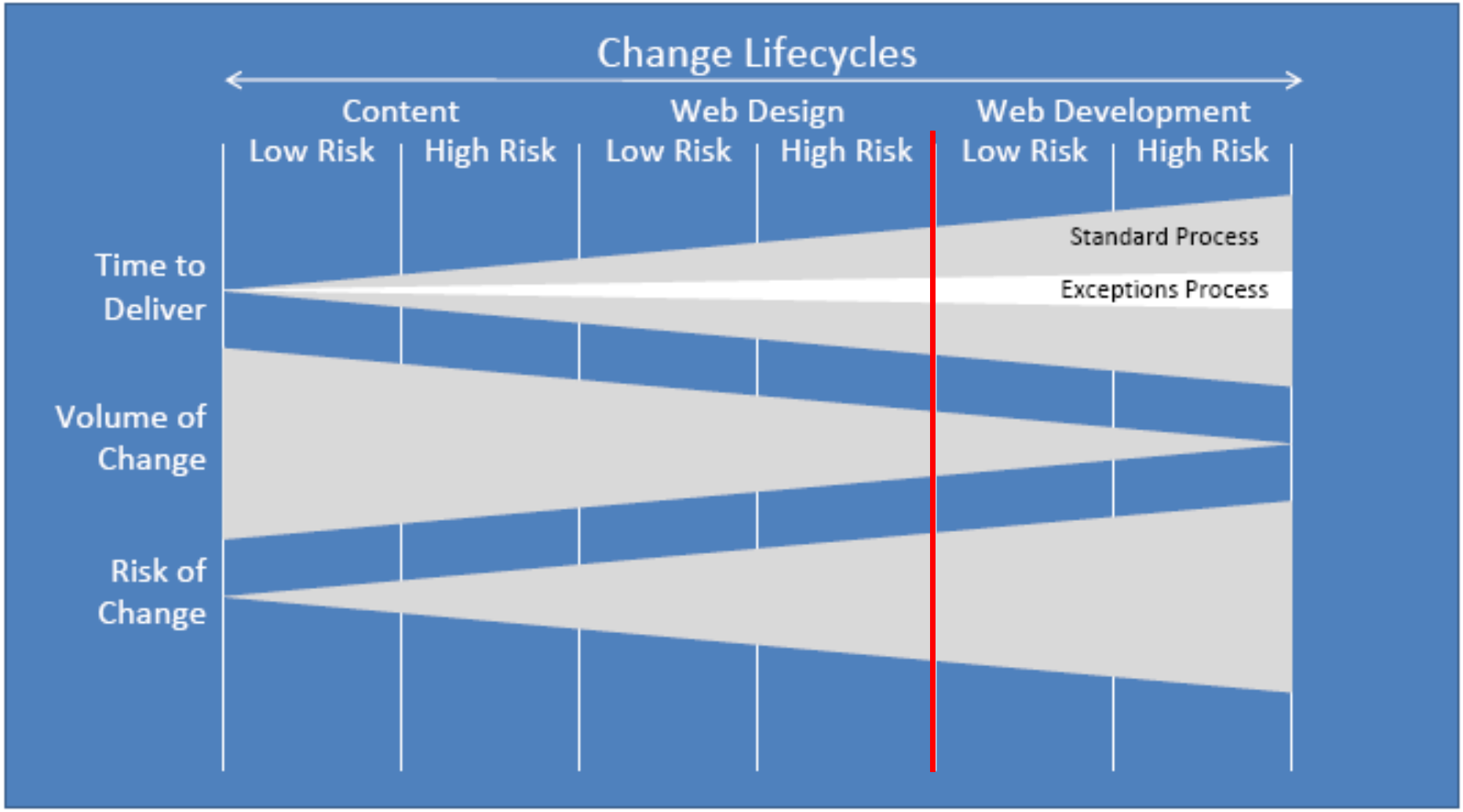
Portal Operating Model – At the heart of change



Governance, Control & Flexibility?

- **Work Reception - Demand**
- **Change Gatekeeper - Governance**
- **Workflows – Control & Risk Management**
- **Change Management - Control & Risk Management**
- **Standards – Enables Cross Functional Working**
- **The Cross functional team – Delivers Flexibility**

The Change Lifecycles



Change & Release Management

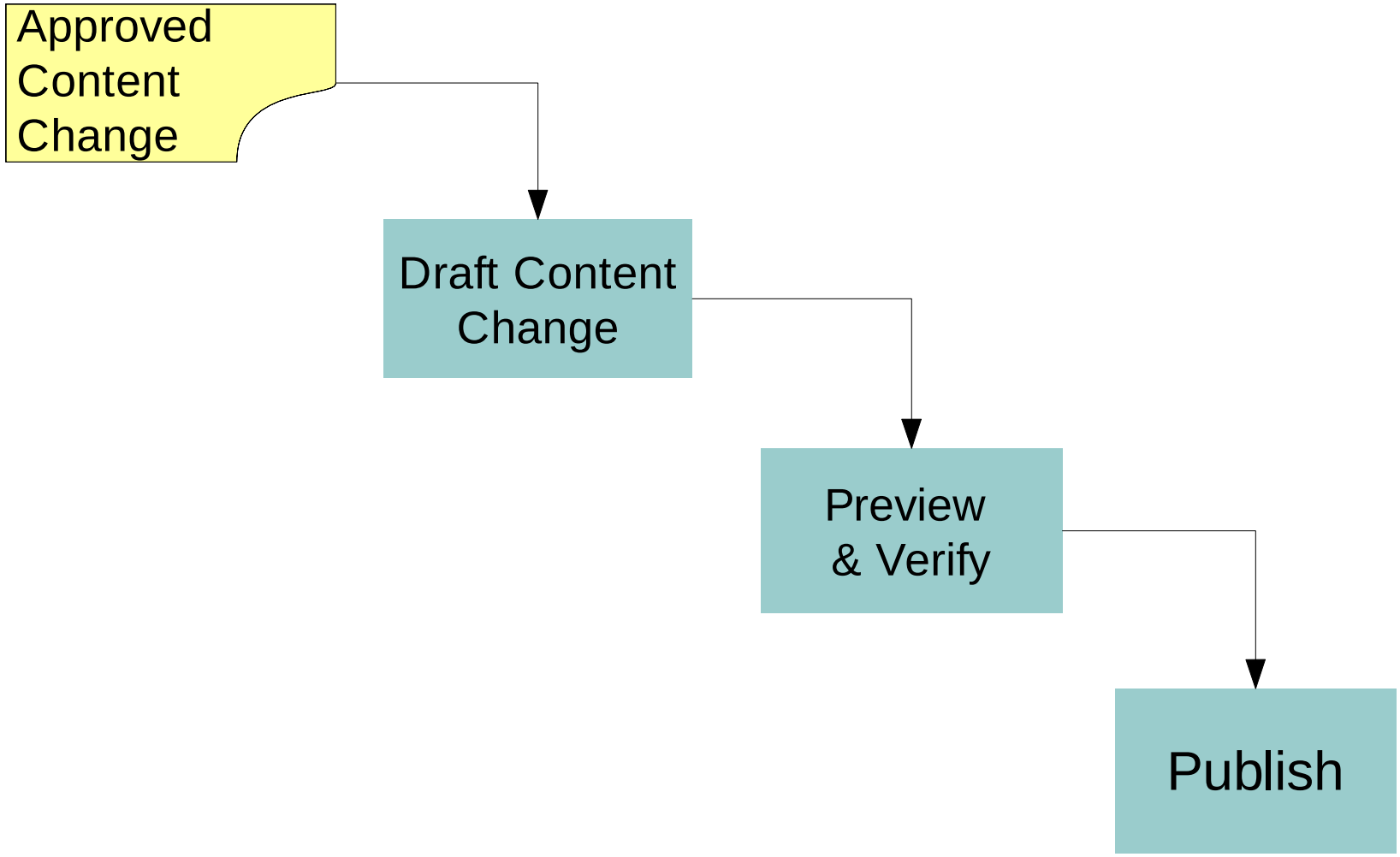
The Portal Operating Model defines clear demarkation and ownership of content, web design and development artefacts which guide the change & release management lifecycles:

Change	Change Description
All changes (Demand)	Generic content change follows Business Operating Model All other Web design and development change projects need: approval through the Portal Governance Board (by Portal) to follow the Portal Operating Model
Business Owned Change	Web content and design changes and processes are owned and managed by business All change approval managed through workflow Technical standards check via workflow required on all high risk design changes Co-ordinated with any development changes by cross functional team Changes mastered in content & design authoring environment in production Changes verified in verification environment in production Changes delivered through syndication
Technology Owned Change	Web development changes and processes are owned and managed by the Technology function. All technology change approval, including standards compliance managed through an appropriate change management process. Changes delivered through release cycles Co-ordinated with any web content and design changes by cross functional team. Changes mastered and tested in dedicated development environment Changes delivered to production through a scripted release deployment process

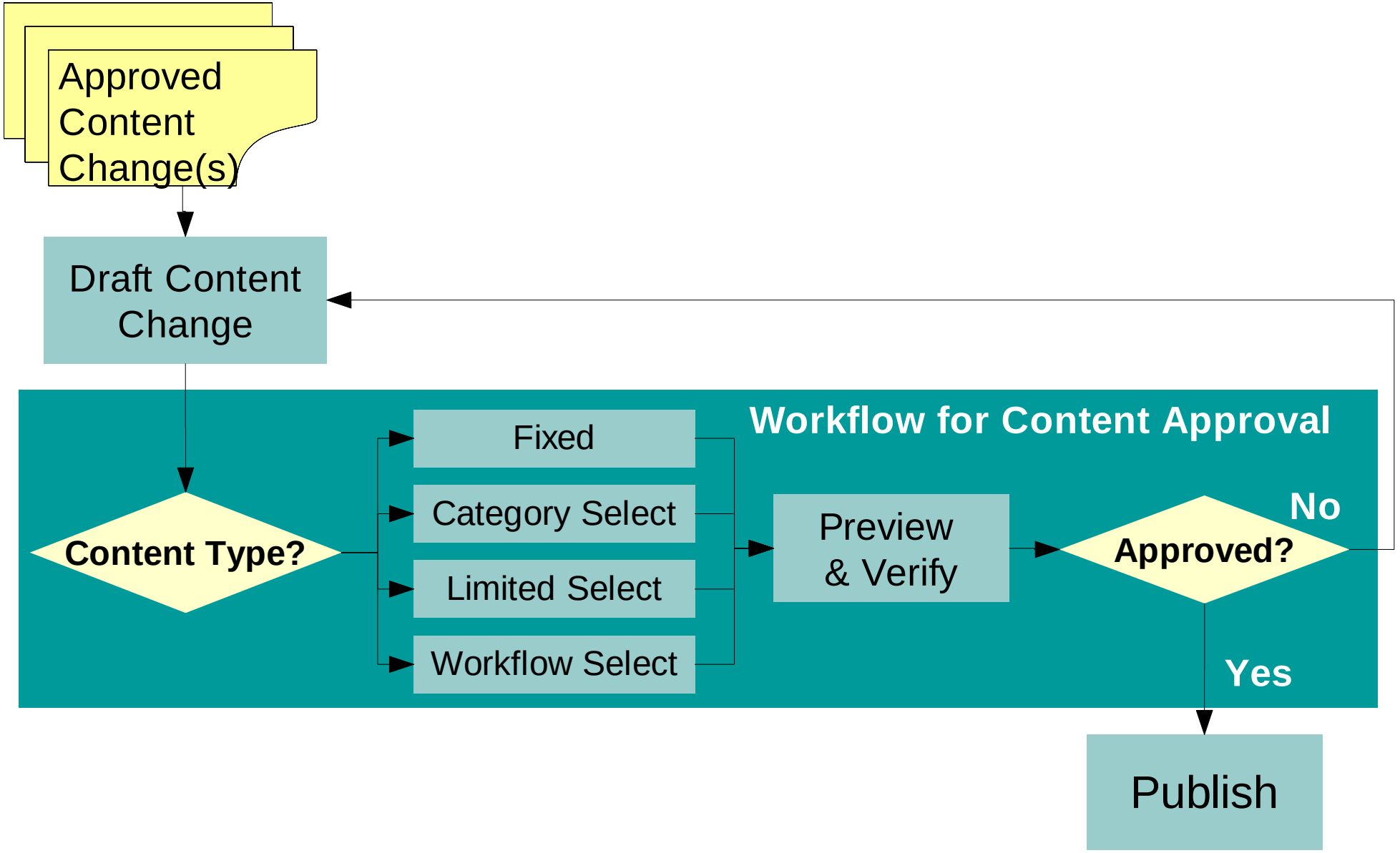
The Workflow Types

Workflow Type	Workflow Description
Straight through	Authored by Content SME
Fixed	Defined type of content change Not authored by Content SME Possibly devolved authoring Requires Content SME Approval
Category Select	Generic content change associated with one or more taxonomy category Not authored by Content SME Possibly devolved authoring Requires Taxonomy Category owner(s) Approval
Limited Category Select	Same as category select but associated with a specific content type Limited to specific taxonomy categories
Workflow Select	Not specifically a workflow, but an authoring template choice
Business Standards Check	Local or Portal Design Change Requires Portal Business Design Authority Approval
Technical Standards Check	Local or Portal Technical Change Requires Portal Technical Design Authority Approval

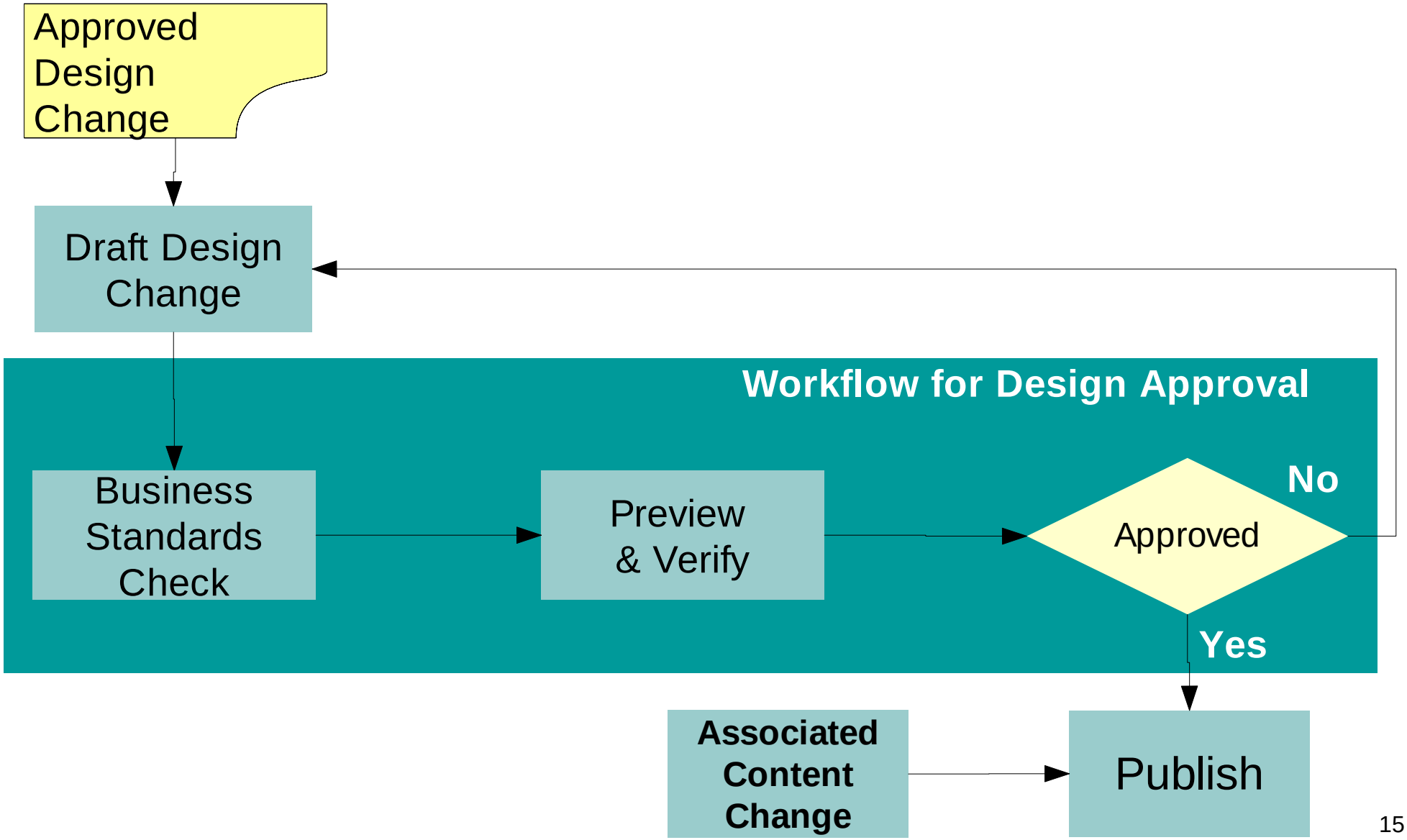
Low risk content (straight-through publishing)



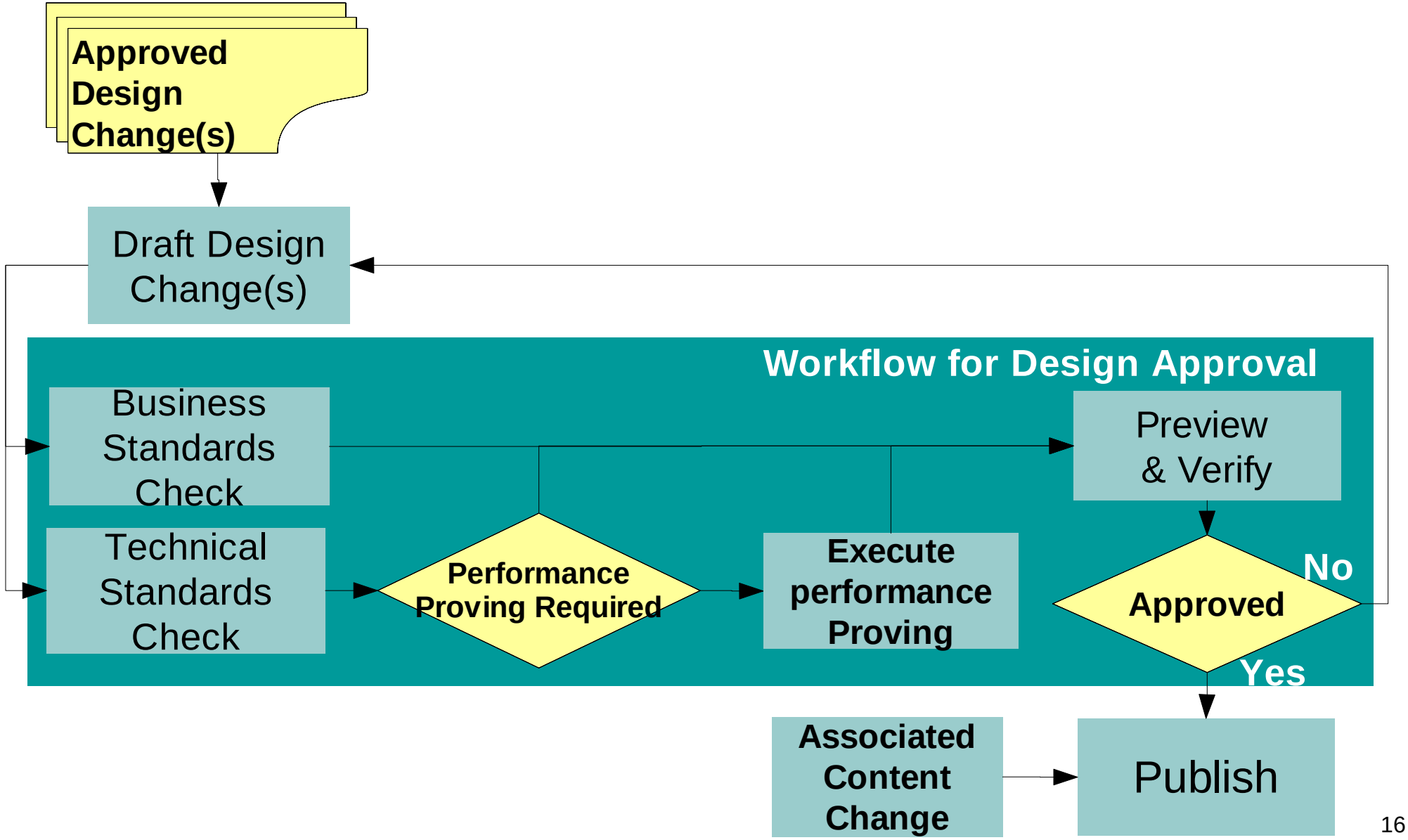
High Risk Content (Content Driven Workflow)



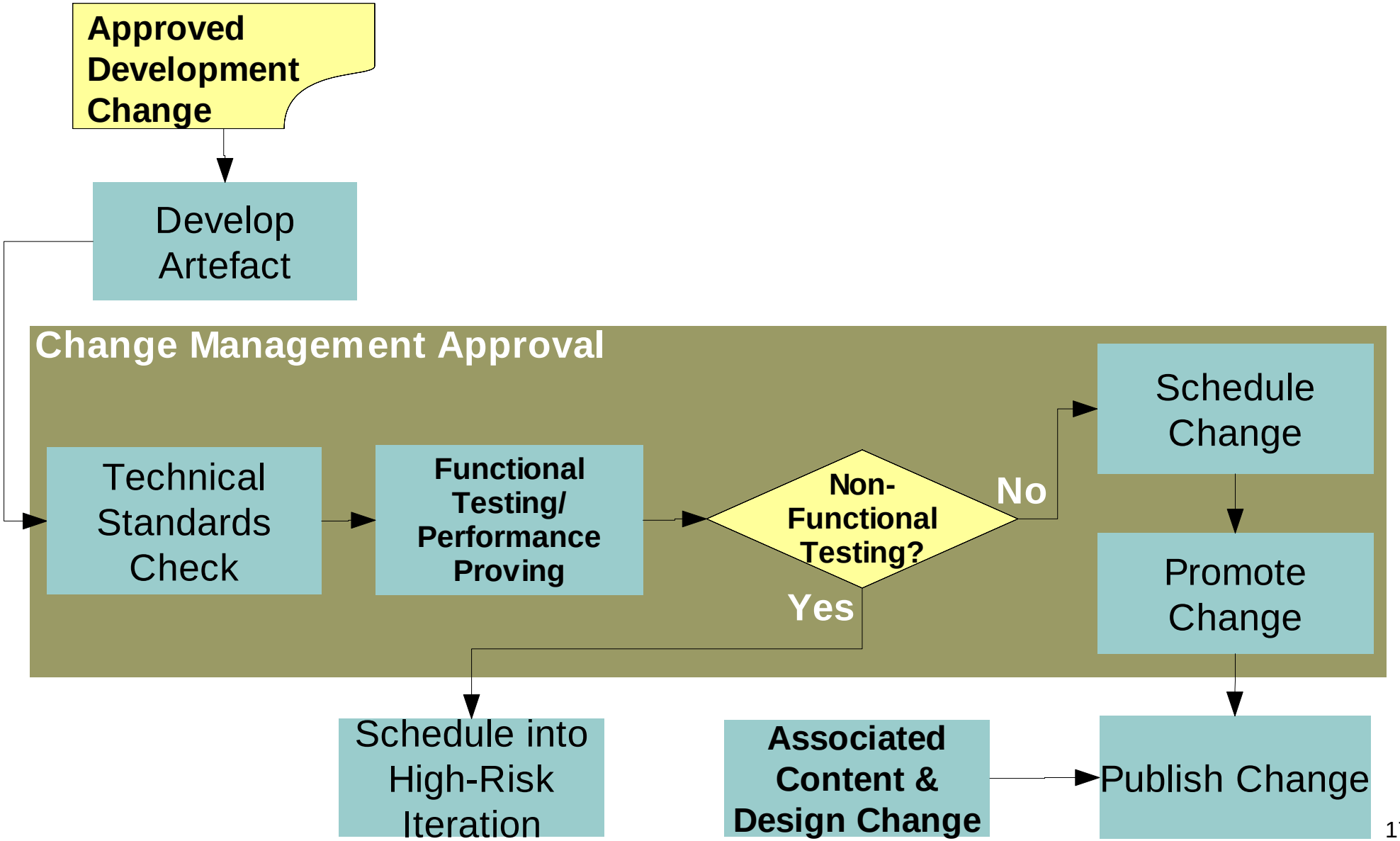
Low Risk Design (Business Standards Driven)



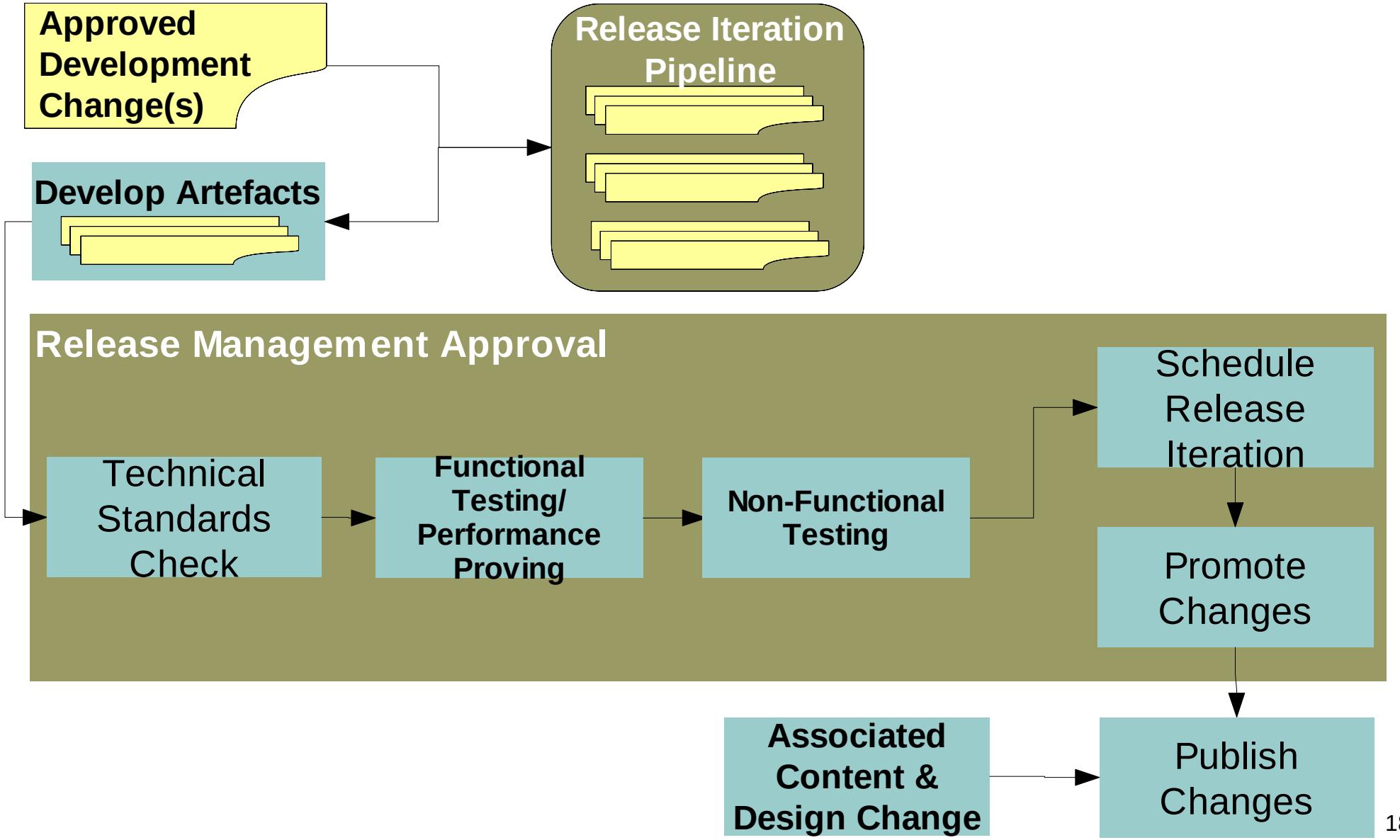
High Risk Design (Business\Technical Standards Driven)



Low Risk Development (Technical Standards Driven)



High Risk Development (Technical Standards Driven)



Other Considerations

- **Clearly Scope each Portal Domain & its overall context**
- **Understand ownership of Business & Technology Portal Roles**
- **Define the change lifecycle delivery approaches**
  - Incremental
  - Iterative
  - Waterfall
  - Other
- **Understand the user journey**
  - Current
  - Future
- **Understand whose driving**
- **Understand the Vision**

The RBS Group Intranet Portal - Background

- **Business Stakeholders**
  - Group Director, Communications
  - Divisional Communications Directors
  - Divisional Intranet Managers
- **Target Scope**
  - All Staff Content and Applications Globally
  - Integration with Global HR and Security solutions
  - Content and Application Security & Personalisation
  - Integration with Staff Collaboration tools
  - Integration with other relevant Portals

The RBS Group Intranet Portal - Approach

- Delivery Approach
  - Iterative releases
  - Incremental content, web design and low risk development changes
- Iteration 0 Scope
  - Deliver Base capability – HR & Security integration, base design & development capability
  - Test\Refine Portal Operating Model
- Iteration 1 Scope
  - Deliver Core capability – Core design & development capability
  - Deliver Core content
- Subsequent Iterations
  - Build Capability
  - Build\Migrate Content

The RBS Group Intranet Portal – Personalised News

In this demo I'll be covering an overview of:

- The Group Intranet Portal Information Architecture
- The Group Intranet Portal Landing Page
- The News Template
- Content Personalistion at RBS

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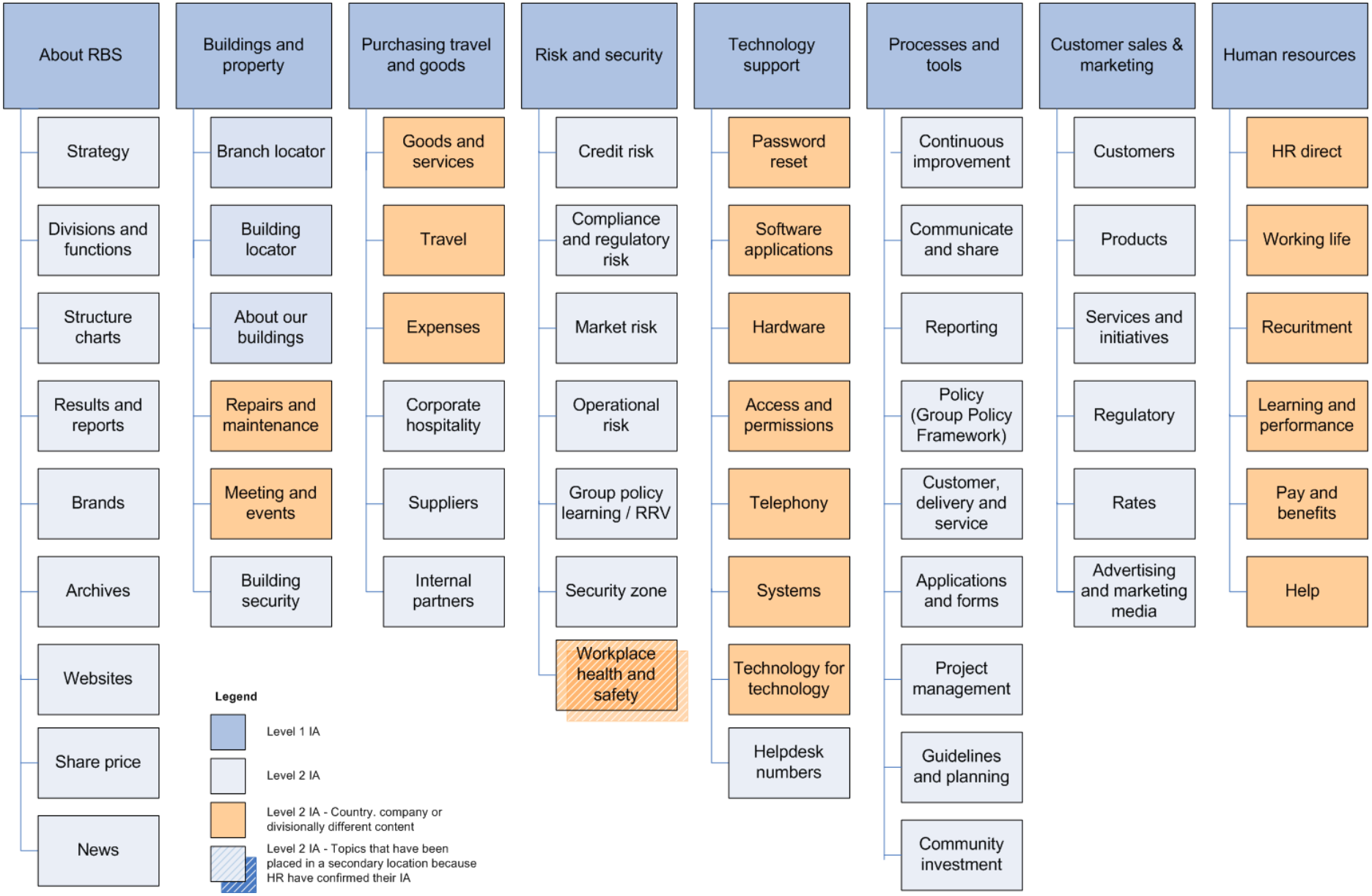
Insite revised Information Architecture L1 and L2 (v2)



The RBS Group Intranet Portal – Personalised News

The RBS Group Intranet Portal – Workflow Demo

In this demo I'll be covering an overview of:

- The Category Select Workflow
- Preview in Context
- Approval\Rejection

The RBS Group Intranet Portal – Category Select Workflow

The RBS Group Intranet Portal – The Vision

Japanese Proverb:

"Vision without action is a daydream; action without Vision is a nightmare"

The RBS Group Intranet Portal Vision Statement:

"Use of the RBS Group Intranet is encouraged to enable staff to better achieve our goals. We should examine all internal process, collaboration tools, and traditional paper based communication to determine value-added applications of the intranet. The focus of this effort is to make it easier for staff to find, and immediately use, the information and tools they need to do their jobs and serve our customers."

What it might look like when we get there:

"The RBS Group intranet Portal becomes a seamless part of our staffs working day. All staff are connected, business partners are connected and all communication, work flow and process are made easier and quicker through well-designed, simple to use and fully integrated web sites."

The RBS Group Intranet Portal – The Vision

The Journey

In Summary

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Q&A