

Fidelity International

Using **business process modeling** to improve the **customer experience**



Client Profile

Fidelity International provides world-class investment solutions and retirement expertise.

Results

erwin helps ensure alignment between the people performing processes and senior management holding accountability; it creates conversations and collaboration between the business and IT.



Olivier Kouao
Operational Architect

Challenge

Fidelity knows that different generations want different information and have distinct communication preferences. For example, Millennials are adept at using digital channels, and they are the fastest-growing customer base for financial services companies. Therefore, Fidelity is seeking to understand customer needs and adapt its processes around key customer touch points and build centers of excellence around them.

Solution

Fidelity needed assistance in defining end-to-end processes to implement dynamic architectures and agile operations in support of customer centricity. A unified process information management platform would remove functional and departmental silos, ensuring alignment among process performers and user-friendly reporting to executive management.

Using erwin Evolve, Fidelity's Business Process Knowledge Base is being deployed across its entire global distribution operation. The goal is to capture/store the mission-critical information for holistic governance of end-to-end process journeys to analyze and improve customer experiences.

The solution has delivered great value for Fidelity already including:

- Uncovering the full process inventory and ownership landscapes, with consensus on roles and responsibilities
- Aligning functions to a single process-naming convention
- Understanding the up- and down-stream drivers and enablers of processes
- Providing a compelling one-stop-repository for accessing critical process-related documents, as well as storing every process flow artifact
- Reducing dependency on disparate pieces of technology while providing greater insights

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