



## CASE STUDY

# Scotiabank International Brings Structure and Repeatability to Its Change Processes

### Industry

Financial

### Challenge

Without division-wide processes, it was increasingly difficult for the bank to standardize and document change management across departments on a global basis.

### Results

- Centralized information flow through the entire application lifecycle
- Streamlined and documented change processes across multiple global sites
- Identified and proactively resolved potential change-related problems

### Products

- Rocket® Aldon Community Manager
- Rocket® Aldon Lifecycle Manager (Enterprise Edition)
- Rocket® Aldon Lifecycle Manager (IBM i Edition)

### Application

- Software Change Management
- IT Services Management
- IT Compliance

## Company

Scotiabank International is one of North America's premier financial institutions. Founded in 1832 in Halifax, Nova Scotia, the institution's 90,000 employees serve approximately 23 million customers around the world through Scotiabank Group and its affiliates. The bank maintains three major business lines: Domestic Banking, International Banking, and Scotia Capital. International Banking Systems (IBS) serves the international unit's information technology needs. The Bank's International Banking business line operates in more than 40 countries and includes offices in the Caribbean, Central America, Mexico, Latin America, and Asia.

## Challenge

With such a large geographically distributed infrastructure, IBS found it increasingly important to introduce division-wide processes for change management. The bank launched the Change Management Strategy refresh project to better manage its IT processes and support infrastructure. The overall objective was to standardize and bring greater structure and repeatability into its change process.

One of the project's specific goals was to introduce a robust approval mechanism for production changes. The bank needed to ensure that key information regarding changes and their associated risks was consistently documented and shared across departments on a global basis. The project mandate also included a requirement for an audit trail to meet regulatory initiatives.

IBS also wanted to create processes that would help individuals, teams, and managers in its labor force to work more efficiently. In particular, the bank hoped to generate metrics on the effectiveness of various processes and use the information to proactively identify potential problems, so that IT could resolve issues in a timely manner.



## Solution

To ensure it was selecting the ideal solution, Scotiabank's international unit carried out a number of feasibility studies before selecting a suite of products from Rocket Software. According to Iain Williamson, a senior change and risk manager at Scotiabank, the organization chose the Rocket® Application Lifecycle Management (ALM) products largely because of their customizable workflow capabilities, which could be adapted to suit the bank's specific requirements. "The choice came down to its ability to fit our existing processes—for example, approvals, change requests, issue tracking—into its solution," Williamson explained.

## Results

Shortly after the evaluation process, IBS deployed the Rocket ALM solution including Rocket® Aldon Community Manager (CM), Rocket® Aldon Lifecycle Manager (IBM i Edition), Rocket® Aldon Lifecycle Manager (Enterprise Edition), and Rocket® Aldon Deployment Manager (DM). The bank ran a largely centralized data center architecture, with some distributed data centers supporting multi-regional distributed sites, branches, and off-site hardware. The Rocket products integrated with the bank's existing IT infrastructure and were compatible with the organization's main operating platforms, including IBM i (AS/400), IBM AIX, and Microsoft Windows.

Integration with additional business processes and functions was another key factor in the bank's selection of Rocket. Initially, IBS used Rocket CM primarily for the service desk function. Once the solution's flexibility became apparent, the organization began to expand usage of the tool.

The team at IBS configured the Rocket ALM solution to perform additional tasks specific to the International division's needs. One example was automating the scheduling of deployments across multiple sites with different timelines and different maintenance windows.

Scotiabank continues to expand its operations in Mexico and Chile standardizing to their core banking solution, SCOTIAPRO. The Rocket ALM solution provides the flexibility that allows Scotiabank to customize SCOTIAPRO and their IT processes based on each countries' specific needs

Today, more than 1,000 IBS users access Rocket ALM products to monitor and manage change requests from the time it is received to when it is deployed into production. Looking ahead, Williamson predicts the bank can continue to leverage Rocket to meet their growth needs. "We will also be able to link many parts of the IT process in the future to gain a consistent automated lifecycle."

**“** *The Rocket ALM solution facilitates the centralization of change and problem management. This enables us to see the big picture of change across the organization, spot potential trouble spots in advance, and act accordingly.* **”**

Iain Williamson  
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