

Tasmanian Perpetual Trustees works with IBM® Premier Business Partner* ISW to improve collaboration and customer service



Overview

■ **Problem**

Tasmanian Perpetual Trustees Limited (TPTL) is a major Tasmanian based provider of financial products and trustee services. Established in 1887, Tasmanian Perpetual Trustees is publicly listed on the Australian Stock Exchange. Tasmanian Perpetual Trustees manages over \$1.2 billion in funds under management on behalf of personal, business and wholesale investors in Tasmania. Tasmanian Perpetual Trustees also has a further \$0.686 billion of assets under advice, through the Company's role as financial advisor, attorney or trustee on behalf of various trusts, estates and other clients.

■ **Solution**

TPTL chose to work with IBM Premier Business Partner ISW to design, develop, and implement a suite of business process and workflow applications. Based on ISW's Workflow-Xpress Framework, the solution is built on IBM's Lotus Notes® and Domino® Version 8. After assessing the alternatives TPTL determined that IBM Lotus Notes and Domino provided the greatest ROI for TPTL's needs. The initial development effort started in June 2007 and was successfully rolled out across the organisation in September 2007 which at the time resulted in TPTL being one of the first organisations in Australia to be live on Lotus Notes & Domino 8.0.

■ **Benefits**

Applications were the main driver for TPTL. The new platform has enabled the company to implement a host of business applications to provide support for workflow management, document management, and responding to TPTL business requirements. TPTL has a firm belief in continuous improvement and Lotus Notes and Domino provided a platform to continually implement improved processes. ISW and TPTL also won an award from TAS ICT for the Best Implementation of an ICT Solution for 2008.

Replacing the legacy platform

TPTL has nine branches throughout Tasmania in Burnie, Ulverstone, Devonport, Launceston, Kings Meadows, Hobart, Glenorchy, Rosny and Kingston. It has over 100 employees.

In 2007, after a formal IT systems review process TPTL concluded that its legacy applications were not fully supporting its growing business needs. Business process changes required to respond to both current and future business needs could not easily, nor quickly, be adopted. Primarily, TPTL wanted tools that were not only messaging platforms but that would also allow for development of collaborative and workflow based applications. TPTL needed tools to support its compliance and regulatory requirements, as well as develop business process applications to support its changing business needs.

The combination of IBM's Lotus Notes and Domino 8 was chosen for its wide ranging capabilities. Lotus Notes and Domino provided TPTL with a collaboration platform, messaging, calendaring, instant messaging and awareness, workflow, application platform, web application server, database, and integration capabilities to legacy systems.

“In comparison to the other options the bang for buck that Notes/Domino 8 provided was compelling. In addition, Domino’s wide support for open standards such as Web Services ensured that integration with other systems was possible.”

— Adam Brown, Executive Director,
ISW Development

Making the selection

The ISW team stood out for its strong IBM skill-set; its expertise in software engineering and development; and its extensive experience in both Exchange migrations and Lotus upgrades.

In addition, TPTL was looking for a long term business partner. ISW was willing to work with TPTL to understand its business and to ensure the solutions would deliver true ROI. ISW worked closely with both the IT and business units at TPTL to understand the business requirements and map the technology to meet those needs. This close partnership between the two organisations was a critical success factor.

“From the outset of our business relationship ISW has proven they can not only design an ideal solution but they can also deliver on the agreed outcomes. It is a pleasure doing business with these guys.”

— David Mills, Manager IT &
Communications, TPTL.

The team waited for the release of IBM Lotus Notes Version 8.0 before launching the project. The wait paid-off, as Notes 8 offered a vastly improved user experience. The new version brought a modern, user friendly interface to Lotus Notes, allowing users to migrate from Outlook with minimum disruption. They developed a series of applications to replace the existing Intranet with a Lotus Notes Home Page/Intranet, HR applications, Capex, Compliance, Controlled Documents application and a Communications application.

The team then executed on a carefully planned migration plan to move the Company’s existing email, calendar, and contacts applications to the new Lotus Notes 8 platform. TPTL and ISW then rolled out a newly developed Client Management System in July 2008, featuring a significant development that integrates with the core back end legacy system that TPTL uses. The Client Management System enables a single client view of a client’s business with TPTL. In addition, the system allows a complete view of the client’s products and services, as well as the client’s contact and correspondence history.

Critical success factors

ISW ensured that a consistent interface was adopted throughout the entire process so that all the applications had the same look and feel. This was an essential component of the successful change management strategy, as the consistency resulted in minimal change resistance from all levels of staff.

The team also conducted user training and communications sessions to take the whole Company through each milestone of the project. These sessions aimed to ensure staff had opportunity to be part of the development decision making process, and fostered positive support from all levels within the Company.

“The close partnership between TPTL and ISW during the design and development stages was critical in building a successful and seamless end-to-end process. ISW's close relationship with our business units enabled them to design and customise applications that were aligned with business requirements,” said David Mills.

Most recently the team worked on an Electronic Access Project which integrated their web based Online Access application with the Client Management System which went live in October 2008. The solution enabled clients to have online access to their accounts, access to electronic forms (Using IBM Lotus Forms), and more workflow and business process applications which overall has helped to improve customer service.

An award winning fast and flexible workflow

The introduction of workflow based applications has resulted in more streamlined business processes within TPTL. Automatic generation and assignment of task based actions reduces human effort and error in managing these tasks along with providing transparency in status tracking as a result of paper-based systems being displaced.”

— Paul Viney, CFO/Company Secretary

The implementation of the Client Management System has been a significant outcome of the project to date. The system has given staff access to client information, products, and services – enabling a holistic view across all clients. The system has enabled the management of an entire client relationship through a single point of contact.

The broad range of applications has also enhanced TPTL's finance and HR systems through the introduction of online workflow. The applications give flexibility when changes occur to the workflow, allowing TPTL to be nimble and able to adapt to changes without having to reconfigure the entire application.

Most recently ISW and TPTL were recognised by TASICT, Tasmania's peak IT Industry Association, at their annual awards night. ISW and TPTL took home the prize for the Best Implementation of an ICT Solution for the successful implementation of IBM Lotus Notes & Domino 8 and Workflow-Xpress.

For more information

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Designed by the IBM Grafxlab.
GL_10482

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