



## From automation chaos to strategic powerhouse: A global bank's center of excellence transformation

### EXECUTIVE SUMMARY

- Leading global private bank with operations across multiple regions and complex financial services portfolio
- Fragmented automation tools created operational chaos, with departments using incompatible systems that required constant workarounds and consumed IT resources for maintenance rather than innovation
- Center of excellence established to transform automation from a collection of departmental tools into a unified strategic capability that could adapt and evolve with business needs
- Flowable Platform selected as technological foundation, providing comprehensive automation capabilities with an intuitive design interface for both technical developers and business users
- User community expanded dramatically from initial implementation to over 1,400 active users, with compliance review processing time reduced from weeks to days
- Transformation from tactical automation to strategic competitive advantage, with democratized automation capabilities enabling continuous organizational improvement

### BUSINESS PROBLEM

#### **Siloed automation tools become operational obstacles**

A large global private bank faced a perplexing challenge that threatened its competitive position and operational efficiency. Despite significant investments in cutting-edge technology and automation over nearly a decade, the organization struggled with operational inefficiencies while more agile competitors perceivably outmaneuvered them in this crucial aspect.

The primary issue became apparent through closer examination: their automation tools had become part of the problem rather than a solution. What started as innovative digital transformation initiatives had evolved into digital stagnation and silos, where an internal web of disconnected automation systems worked against each other rather than in harmony.



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Each department had independently pursued automation solutions that addressed their immediate needs, resulting in a sprawling ecosystem of tools that struggled with compatibility. For example, operations teams relied on one platform for transaction processing while compliance specialists used entirely different systems for regulatory reporting, and customer service representatives navigated yet another set of applications for client interactions. This fragmentation forced employees to become experts in multiple systems, rather than focusing on their core competencies. As a result, critical business processes that spanned departments became bottlenecks, slowing decision-making and frustrating staff while weakening client experience.

**CHALLENGE**

**Fragmented systems creating organizational inefficiency and compliance risks**

The bank’s operational challenges were deeply embedded in its technology infrastructure and organizational structure. The fragmented approach to automation had created several interconnected problems that compounded their operational difficulties and threatened their strategic objectives.

**System Integration Nightmare:**

The bank’s IT department found themselves constantly firefighting integration issues between systems that were never designed to work together, spending more time maintaining existing infrastructure than innovating for the future.

**Shadow Process Proliferation:**

Employees throughout the organization had created **workarounds to bridge gaps between incompatible systems**, introducing compliance risks and operational inconsistencies that auditors flagged repeatedly.

**Resource Misallocation:**

Highly skilled professionals were spending significant time navigating between different automation tools rather than focusing on strategic activities that required their expertise.

**Scalability Limitations:**

The fragmented approach made it nearly impossible to scale automation initiatives across the organization or adapt quickly to changing business requirements.

**Governance Gaps:**

Without unified oversight of automation initiatives, the organization lacked visibility into workflow optimization, and automation performance, resource utilization, and strategic alignment, making it challenging to optimize operations and demonstrate a return on investment.

The organization needed a solution to unify its automation capabilities and provide the **governance framework required** for a regulated financial institution, all without disrupting ongoing operations or compromising existing functionality.



SOLUTION

**Center of excellence strategy that democratizes automation capabilities**

Rather than continuing to patch problems with additional point solutions, the bank's leadership team made a strategic decision to reimagine how automation could serve their business strategy. The approach required the creation of a center of excellence to transform automation from a collection of departmental tools **into a unified capability that could adapt and evolve** with their business needs. The center of excellence strategy addressed their core challenges through several key innovations:



**Unified Governance Framework:** Serving as both a **governance body and an innovation hub**. Established standards and best practices empower business experts throughout the organization to create and modify automated processes without requiring deep technical expertise.



**Democratized Automation Capabilities:** Enabling the people who **understood business processes best to improve them directly**, rather than relying on lengthy IT development cycles.



**Strategic Process Selection:**

The implementation focused on proving capabilities with the bank's most complex process, which involved comprehensive compliance reviews that typically required multiple departments and external stakeholders. This approach quickly **demonstrated platform capabilities while building organizational confidence**.

***The center of excellence exceeded every expectation the leadership team had established when launching the initiative, transforming not just individual processes but the organization's entire approach to operational improvement and strategic planning.***

The platform's model-driven approach enables the team to visualize complex business processes and modify them quickly as requirements evolve. Equally, its robust integration capabilities connect seamlessly with the bank's existing systems and data sources.

The solution created an environment where business experts could directly create and modify automated processes while maintaining precisely the type of governance framework a center of excellence requires.



BENEFITS

**Scaling automation adoption while accelerating critical business processes**

The center of excellence exceeded every expectation the leadership team had established when launching the initiative, transforming not just individual processes but the organization's entire **approach to operational improvement and strategic planning.**



**Dramatic User Adoption and Engagement**

The center of excellence expanded its active user community to over 1,400 users who actively create and deploy automation solutions across the organization. Employees who had never considered themselves developers are now successfully building and deploying workflow solutions to improve their daily operations.

The platform's citizen development capabilities enable business analysts and process experts throughout the organization to create sophisticated automation solutions that address their specific needs, without waiting for IT resources to become available, thereby significantly reducing the time-to-value for automation initiatives.



**Operational Excellence and Process Acceleration**

Compliance reviews that previously required weeks of coordination between multiple departments now flow smoothly through automated workflows, ensuring consistency and completeness while reducing processing time to just days. This improvement alone delivers significant value by accelerating critical regulatory processes and reducing compliance risk.

The platform's **process mining capabilities** now reveal inefficiencies and bottlenecks that were previously invisible in the fragmented system, enabling the team to optimize workflows based on actual performance data rather than assumptions about how processes should

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### Strategic Organizational Transformation

The early successes in process improvements generated enthusiasm for additional automation projects, resulting in a strengthened culture of continuous optimization throughout the organization. This cultural shift is as valuable as the technical improvements, establishing automation as a strategic capability rather than a tactical tool.

The platform's analytics capabilities provide leadership with unprecedented insight into how work actually flows through the organization, revealing opportunities for standardization and optimization that are delivering significant efficiency gains beyond the initial automation projects.

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### A roadmap to build an automation centre of excellence

The transformation achieved by this global financial institution demonstrates that centers of excellence offer a proven approach for turning automation

from a tactical necessity into a strategic capability that drives competitive advantage. Any journey from fragmented automation to a centre of excellence requires strategic vision and a clear plan:

- 1. Establish clear governance from the start:**  
Create frameworks that strike a balance between oversight and empowerment, ensuring quality while enabling innovation and responsiveness to requirements.
- 2. Invest in citizen developer capabilities:**  
Select platforms that enable business experts to create and modify automated processes directly, reducing IT dependence while ensuring solutions address business needs.
- 3. Focus on integration and interoperability:**  
Choose technology that connects seamlessly with existing systems, avoiding fragmentation while enabling flexibility.
- 4. Build momentum through strategic wins:**  
Start with complex, high-value processes that showcase platform capabilities and build confidence.
- 5. Measure both efficiency and agility:**  
Track operational metrics alongside responsiveness indicators, such as time-to-market.

When strategic thinking meets unified automation capabilities, businesses improve efficiency, unlock new levels of agility, and innovate to create lasting competitive advantages. Organizations with these capabilities view automation as more than just a tool for optimization, instead building a foundation for continuous digital transformation.