

Case Study

Target Operating Model Review



Client **AIM listed wealth management company**

Service Change Management

The Work We were engaged by our client to provide independent assessment and challenge over their proposed Target Operating Model which involved aligning front, middle and back office operations to provide an efficient end to end process.

How We Helped Our approach commenced by gaining an understanding of the 'current state operating model' defining business requirements and helping to define the target operating model which supported those business requirements. We then reviewed the existing system architecture and its ability to support the target operating model and advised on areas where functional gaps existed along with recommendations for bridging the gaps.

Following this we carried out a review of the implementation plans, programme structure, resourcing, and governance of the programme integrated all of the findings into the programme risk register and agreed ownership and action plans to mitigate the identified risks.

Once the programme was mobilised we provided ongoing programme assurance by reviewing progress against objectives, review of deliverables and continuous monitoring of risks and issues to the achievement of the programme objectives.

In addition, we provided an independent member of the Programme Steering Committee to act as advisor.

Value Added We were able to draw on a number of resources with specific expertise to cover all areas of the programme; business, technical and programme management helping the client deliver a successful programme and a target operating model aligned to their Group strategy.

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