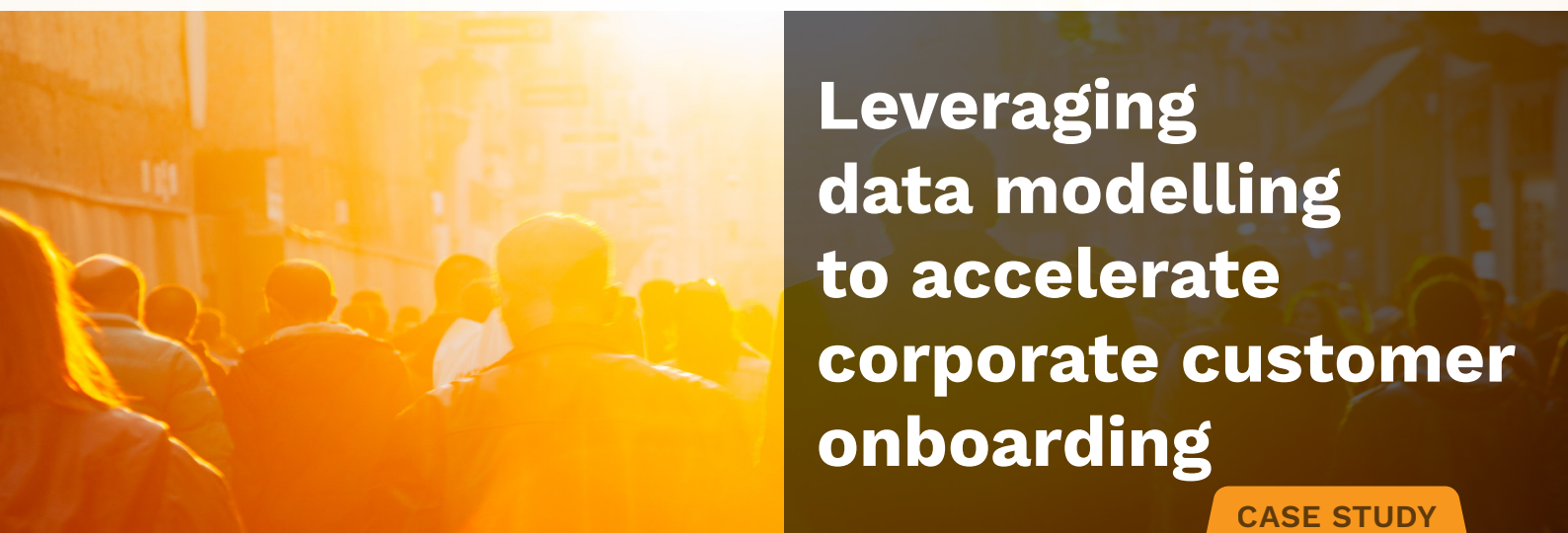


A background image showing a crowd of people from behind, looking towards a bright, hazy horizon, possibly a city street or a large gathering. The image is overlaid with a dark orange gradient on the right side where the title is located.

Leveraging data modelling to accelerate corporate customer onboarding

CASE STUDY

Our Client, a global Tier 1 bank, initiated a major transformation programme to dramatically improve both the staff and customer experience for corporate customer onboarding across Commercial Banking. The key requirements of the programme were to integrate with existing key banking systems, decommission obsolete applications, and accelerate and streamline the end-to-end onboarding process.

The complexity of the system setup within the Bank, across multiple countries and regulatory jurisdictions, made this programme a huge undertaking. The Bank was especially challenged in managing large amounts of sensitive data and its integration across systems, versions, and countries. The mapping of the data between the systems, and the governance surrounding this, were key to the success of the programme.

Alongside the architectural design and delivery, Icon was tasked with modelling the data requirements through all aspects of the onboarding journey. The Bank asked Icon to define and build both the data definition and data mapping strategy and tooling, along with a robust process to support its implementation.

Why Icon Solutions?

Icon had previously worked on multiple programmes across the Bank and has been instrumental in designing much of the architecture to be integrated with the onboarding programme. Our SMEs also designed and built several of the data models with which the programme was planning to integrate.

Due to Icon's very positive reputation, we were approached to help set up and shape the programme. Icon joined the programme with the specific remit to design the future state architecture, which included the supporting data model, and integration with management systems.

Our Approach

Icon drove the analysis, design and delivery of key aspects of the programme. This team included Solution Architects, Data Architects, Data Analysts and Integration Delivery Leads.

Our approach was to understand the flow of data from the point of input, the systems that data would need to traverse, and the final destination of the data. We were then able to model this data by country, system of origin and dissemination, and design datapoints (with version control) so that we could validate the data lifecycle and ensure that no data items were unaccounted for.

We were able to move the project focus away from the representation of questions in the UI, to the technical data points within the onboarding systems. Once this focus was shifted, the flow was simplified into a series of mappings:



This simplification reduced the scope of work for individual teams: for example, the UI Question Team no longer needed to try and map a front-end question to the Integration System – instead, they were able to focus on the Business side of the solution and avoid getting bogged down in technical integration.

This approach also simplified the work for different countries. The original approach of one-size-fits-all meant constant system-wide changes, which risked the early swamping of the programme with constant mapping updates. By breaking the model down by country, both local country and system changes were possible without impact to the wider audience: we had effectively decoupled key phases of the onboarding process into more manageable components.

The scale of the data mapping encompassed some 2,500 data points across five key systems based in fourteen countries. Due to the quantity and complexity of the data, the modelling tasks required more than the usual spreadsheet-based approach. Icon was instrumental in designing and creating a dedicated tool built on a relational database for all mapping purposes.

Icon worked with teams from the other integration platforms, as well as the corporate Chief Data Officer, to build a definitive list of data points adhering to the standards within the Bank. As these were in various forms (predominantly spreadsheets) we needed to standardise the data in one form, with this tool planned to become the single consolidated view of data points and mappings across key systems.

The Outcomes

Icon identified the need for both a centralised data mapping approach and process, along with a standardised tool to support this.

The benefits of this included:

- A centralised canonical view of data points and mappings between systems.
- A mapping tool which can be utilised across the Bank to reduce integration analysis cost and effort on all future projects.
- Support of both forward and backward compatibility of data which better facilitated the staggered, multi-country release model, and also allowed for the delayed feature delivery of the integration systems by decoupling the hard dependencies of between different systems and versions.

Transformation programmes live or die on their successful integration with existing systems: the work that Icon carried out was at the core of this critical aspect. Not only did we shape the architectural landscape, we achieved something no one had done before – we created a reusable, generalised, canonical view of the key system data points and the mapping between them.

**DISCOVER HOW ICON CAN HELP
DIFFERENTIATE YOUR ORGANISATION**

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