

Embraces SOA to Improve Business Agility and Reduce Application Complexity

“CSC was essential in helping Zurich outline a strategy for our global SOA program and crucial in taking the concepts to real-world implementations in terms of governance, methodology, standards, etc. It’s easy to create slides but an entirely different matter to take those slides and turn them into real, working SOA services.”

— Bryan Mjaanes, VP and Director, Global SOA Program and North American SOA Competency Center

Zurich Financial Services (Zurich) is a global insurance-based financial services provider with offices in 170 countries. Zurich faces a challenge shared by many established insurers: how to keep their core products competitive and in regulatory compliance while continuing to shorten the “product-to-market” cycle. Many of Zurich’s IT assets are in silos by business unit or region or service area; there is duplicate functionality across the silos, and integration and maintenance costs are climbing. To address this challenge Zurich has undertaken a multiyear program to transform its application portfolio through service-oriented architecture (SOA).

SOA is a disciplined, standards-based approach to building business applications in which business and system functions are developed as independent, reusable services that can be linked together in a flexible, dynamic, and cost-effective manner. SOA aligns well with Zurich’s corporate-wide shift to business process orientation known as *The Zurich Way*. With SOA, Zurich expects to:

- Improve business effectiveness and flexibility by exposing and sharing information across functional silos
- Gain cost efficiencies through faster, more consistent solution delivery
- Lower costs for operations, maintenance and testing activities
- Reduce risk through standardization and service reuse
- Create an adaptable application environment with less complexity and redundancy and greater, more flexible interconnectivity

In other words, Zurich believes widespread SOA adoption will help it better respond to market opportunities and to its competition.

Launching a Global SOA Program

Several Zurich development groups were already starting to move toward SOA; enterprise architecture leaders recognized an opportunity to proactively manage the introduction of this new architecture and technology into the enterprise in a controlled manner. As one of Zurich’s global application outsourcing partners, CSC was in a unique position to recognize the strategic value that SOA could bring to this client. CSC worked with Zurich to gain economies of scale by combining individual SOA activities into a single global program with initial representation from business units in the United States, United Kingdom, Germany and Switzerland. CSC SOA experts joined the Zurich Global SOA Program (ZSOA) at its inception as key members of the ZSOA Global Core Team. Since then, CSC has been actively involved with nearly every aspect of this enterprise-wide SOA program.

Early discussions centered on defining the scope of the ZSOA Program. Zurich adopted a comprehensive approach to SOA encompassing service portfolio planning, program governance, change management, business and technology architecture, delivery of shared services, and a disciplined approach to service oriented development. CSC collaborated with the ZSOA Program Director to develop a pragmatic implementation plan and prepare the funding request to launch the ZSOA Program. Once it was approved, the real work began...



"[CSC's SOA team is] a knowledgeable team with a lot of industry experience using varied platforms. They were able to bring that experience, working in partnership with our internal team to quickly deliver on our SOA initiative. I have been extremely pleased with the professional services folks."

— Kevin Hunter, VP and Chief Architect of Zurich North America

About CSC

The mission of CSC is to be a global leader in providing technology-enabled business solutions and services.

With the broadest range of capabilities, CSC offers clients the solutions they need to manage complexity, focus on core businesses, collaborate with partners and clients, and improve operations.

CSC makes a special point of understanding its clients and provides experts with real-world experience to work with them. CSC is vendor-independent, delivering solutions that best meet each client's unique requirements.

For 50 years, clients in industries and governments worldwide have trusted CSC with their business process and information systems outsourcing, systems integration and consulting needs.

The company trades on the New York Stock Exchange under the symbol "CSC."

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Organization and Governance

Zurich selected a "SOA Competency Center" model; CSC's experience has shown this approach is quite effective for organizations starting to implement SOA. Rather than allowing pockets of expertise to develop independently in isolated projects, SOA experts are brought together and collectively managed as a shared resource supporting many projects. The SOA Competency Center governs and manages the service portfolio; it develops and promotes the use of SOA standards, policies and best practices; and it provides mentorship and direct delivery support to individual SOA projects. As SOA expertise becomes more prevalent throughout the enterprise, the Competency Center will typically shift into a more consultative role focused on SOA strategy, governance and quality. To align with Zurich's federated culture, several regional ZSOA Competency Centers were established. Each regional Competency Center participates on the ZSOA Global Core Team, to share ideas and to develop architectural standards, patterns, policies, frameworks, and templates for use by all.

CSC also stressed the value of service portfolio planning as a strategic part of SOA Governance. Service portfolio planning aligns and prioritizes key service development efforts against planned development projects in support of critical business objectives. CSC was a key participant in "service roadmap" projects for both Farmers Insurance Group and Zurich North America. New development projects are now assessed against these service roadmaps to identify reuse opportunities. ZSOA Competency Center Directors will also measure progress against the service roadmaps as a gauge of the enterprise's SOA maturity.

CSC collaborated with Zurich experts to define SOA governance policies and processes that aligned and leveraged existing IT governance mechanisms. The resulting ZSOA governance model defines clear roles and responsibilities, formalizes decision-making authority, and establishes practical metrics to measure results from the ZSOA Program.

Selecting Technology and Delivering the First Services

Leveraging CSC's experience and templates, Zurich was able to quickly prioritize their key SOA requirements for the near and long term, creating a ZSOA *Technical Reference Architecture* to guide future SOA technology selection efforts. The team finalized formal evaluation criteria and created vendor scoring models, then issued a Request for Information to the short-listed vendors. Zurich relied heavily on CSC experts to help evaluate (and challenge) the vendor responses. CSC also assisted with the design and management of an on-site proof of concept validating interoperability between the selected components and vendors. Zurich senior leadership was impressed with the speed of the selection process and with the successful outcome of the proof of concept. This early success helped gain executive buy-in and increased internal "market buzz" for the ZSOA program.

In partnership with Zurich staff and vendor professional services resources, CSC managed delivery of the initial business services for Zurich North America and Farmers Insurance Group. To the delight of Zurich executive management, the first ZSOA services were completed 13 days ahead of schedule.

Within Zurich, the ZSOA Program is now highly visible and recognized as one of Zurich's strategic IT initiatives. It has also been praised as one of the most comprehensive SOA programs in the industry. Many new ZSOA projects are in the pipeline. From its inception CSC has served as a trusted advisor to the ZSOA Program, providing guidance and counsel to the senior leadership team on a variety of levels and topics. CSC continues to support this strategic initiative through consulting, project management and service development expertise in business units across the United States and Europe.