

# AUTOMATION EXCELLENCE

HSBC

## OVERVIEW

### 1. Situation

- ✓ HSBC Global Banking & Markets needed to enhance its decision support capabilities through automation, necessitating a structured approach to user adoption and programme governance

### 2. Task

- ✓ As a Business Change Analyst and Finance Transformation Specialist, I was responsible for supporting the automation initiatives, focusing on creating a User Adoption Framework, managing project roadmaps and streamlining governance processes to support effective implementation

### 3. Actions

- ✓ 1. User Adoption Framework:
  - Developed a comprehensive User Adoption Framework and Communication Strategy to ensure seamless implementation and widespread stakeholder engagement
- 2. Collaboration and Roadmaps:
  - Collaborated closely with Programme Leads and Subject Matter Experts (SMEs) from IT, Finance, DevOps, and Product Ownership to manage the development roadmaps for visualisation projects
  - Diligently tracked Risks, Assumptions, Issues, and Dependencies (RAID) status and provided timely updates to stakeholders to ensure project alignment and progress
- 3. Enhanced Governance:
  - Streamlined the decommissioning of non-automated reports, improving governance and access controls
  - Refined automated visualisations and dashboards to meet specific business unit needs, enhancing user experience and data accessibility

### 4. Results

- ✓ - Successfully implemented the User Adoption Framework and Communication Strategy, ensuring widespread stakeholder engagement and buy-in
  - Improved project alignment and progress tracking through effective collaboration with Programme Leads and SMEs
  - Enhanced governance and access controls by streamlining the decommissioning of non-automated reports

- Improved user experience and data accessibility through the refinement of automated visualisations and dashboards

## 5. Affected parties

- ✓ - Senior Management: Gained confidence in automation initiatives, enhancing strategic alignment with operational goals
- Programme Leads and SMEs: Benefited from improved collaboration and clearer project roadmaps, facilitating more effective programme execution
- End Users: Experienced enhanced data accessibility and user experience through refined visualisations and dashboards, leading to better decision-making
- Compliance and Governance teams: Ensured adherence to access controls and reporting standards, minimising risks associated with non-compliance