



Edenhouse
CREATIVE BUSINESS SOLUTIONS

**Banco Santander
Case Study**

**Project Tree:
Abbey / Resolution Separation Programme**



Client Overview

Abbey is one of the UK's leading personal financial services companies. Their goal is to be the best bank on the high street in the UK for customers and employees.

They offer a full range of personal financial services, both direct and through intermediaries. The range of services includes mortgages and savings, bank accounts, loans and credit cards, long-term investments including pensions and unit trusts, life, critical illness and unemployment cover and household insurance. They also provide offshore banking for expatriates.

Abbey's roots date back to 1849, with the establishment of the National Freehold Land and Building Society. In 1944, it merged with the Abbey Road Building Society to form Abbey National. In July 1989, it was the first building society to convert to plc status and to be floated on the London Stock Exchange.

On 12 November 2004, Banco Santander Central Hispano, SA (Banco Santander) acquired Abbey. Santander is Spain's largest financial group, and the fifth largest International bank in the world by profit. It has a presence in 40 countries, with over 132,000 employees serving 69 million customers through a network of more than 11,180 branches. It is the largest financial services group in Latin America, and has the third largest consumer finance business in Europe. The bank focuses on retail banking, which makes up 79% of revenues, but also offers a wide range of financial services.

www.abbey.com part of the Santander group, www.santander.com

The challenge

Abbey announced in June 2006 its intention to sell its life businesses to Resolution plc with the deal to be completed by September 2006. From this date Scottish Mutual International plc, Scottish Provident Limited, Scottish Mutual Assurance plc, Scottish Provident International Life Assurance Ltd (SPILA) and Abbey National Life plc would transfer ownership to Resolution.

In order to facilitate the IT aspect of this sale, Project Tree was formed to concentrate on the isolation (Phase One) and subsequent separation (Phase Two) of Abbey and Resolution owned systems.

The existing systems landscape was complex with hundreds of applications residing on a wide variety of technologies all of which were resident on the Abbey infrastructure. These applications were either, wholly Abbey-owned, wholly owned by the organisations moving to Resolution, or shared between the two.

The technical aim of Phase One was to create isolated Infrastructures for both Abbey and Resolution within Abbey's Data Centres in Milton Keynes and Glasgow, onto which the applications of Abbey and Resolution could be installed and run so that they were independent of each other.

The objective was that, post isolation, either company could move individual applications or change items of infrastructure without impacting the other company. It would also provide Resolution with an isolated set of applications and infrastructure which they could then transition away (Phase Two) from Abbey's data centres in due course.



Our involvement was to project manage and provide resource to deliver infrastructure isolation. The scope of the project included:

- The provision of a separate network for Resolution onto which all Resolution Services were connected
- IBM Mainframe Separation by logical partition (LPAR)
- Separation of all Wintel kit hosting shared services
- Migration of AS400 hosted services
- Separation of HP Unix kit running Resolution services
- Separation of shared databases, both MSSQL and Oracle
- Support for migration of applications to separated infrastructure
- Support for testing of applications on separated infrastructure
- Post sign-off enablement of firewall rules to restrict inter company application access to only agreed traffic

Edenhouse Solution

Our remit initially was to understand the scope and scale of the requirement by engaging with a number of the key managerial and technical staff within Abbey. Once our analysis was completed we offered to deliver the project on a fixed price basis, taking into account all resource requirements.

In total there were nine work streams under our control, along with project management and project office support. The streams were:

- Networking: the creation of a new Resolution network to accommodate all data centres
- Firewalls: creation of firewall rules to restrict inter company access to only agreed traffic
- Wintel: installation and application build of 40 new Wintel systems to mirror existing environments, and move of over 180 servers of which over 140 were live servers
- Unix: migration of Resolution Unix estate and replication of shared infrastructure
- Mainframe: separation of Abbey and Resolution by logical partition (LPAR)
- AS/400: migration of Resolution only services
- Databases: duplication of environments and support for application teams separating data
- Storage and backup: setup and management of SAN and global backup environments
- Testing: management of business testing for all applications

With Abbey and Resolution businesses closely entwined on the infrastructure careful consideration had to be taken as to the best approach for isolation. There is always the potential in such an integrated environment for something to be missed; therefore it was important to balance the meeting of timescales against a thorough testing approach to mitigate this risk.

We had to consider planning around strict business working hours, which sometimes differed between Abbey and Resolution, along with internal change freezes applied on occasions by the business(es), and the constraints of working in an environment where other large IT projects were being delivered in parallel to our own.

Each work stream required a combination of resources to ensure its success, including our own, internal Abbey, and Resolution resources. As with many internal staff not under your direct control there were always demands on their time for other internal projects, so it was important to create good working relationships with all of the key stakeholders to manage such instances. However there



are inevitably issues which need to be worked around, so creative re-planning was required on occasions.

The different teams were also spread over a number of locations, in both Milton Keynes and Glasgow. This meant communication and awareness of tasks, progress and targets were extremely important to up keep momentum.

Finally, this project was the first part of the wider programme to separate the Abbey and Resolution business. Close links into the other programme workstreams were key in order to ensure that they progressed on plan. With infrastructure being at the front end of the process it was important to prioritise and juggle requirements in order to avoid any programme delay.

Impact/Results

The Edenhouse team, managing the infrastructure isolation, played a key role in ensuring the project successfully met its target, which it did in March 2008.

Upon completion of the isolation phase Edenhouse solutions continued to provide technical and management resource, with detailed knowledge of the infrastructure isolation phase, to enable project to progress with the transition phase.

The Santander service manager Alistair Mortimer commented, “I found the Edenhouse resources to be professional and focused, and yet they remained pragmatic and flexible in what was a demanding programme environment. The need for flexibility was always going to be key in such a complex scenario with multiple stakeholders, conflicting priorities and virtual teams spread geographically and organisationally, and the team really showed this. The technical skills of the team were obviously fundamental to the success of the engagement, but I also felt that it was their willingness to adapt to new challenges and accommodate new requirements that allowed the programme to be so successful.”



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