Case study

We manifest change.

Bank Acquisition Integration

Programme Delivery & Data Migration

Large Retail, Corporate and Investment Bank



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Outcomes

- ***Programme governance and PMO:*** *Set up governance across 22 workstreams and 300+ resources, giving clear visibility and control over decisions and dependencies.*
- ***Data migration leadership:*** *Migrated data from several source systems into 20+ target systems, with the data arriving complete, reconciled and accurate.*
- ***Dress rehearsals and cutover:*** *Ran several dress rehearsals and a 1,000+ activity cutover plan, which enabled a controlled multi-day cutover.*
- ***Post-go-live stability:*** *Stable operations after go-live, with 98% of queries closed.*

Key Insights

- *Strong governance, clear accountabilities and disciplined programme management from day one are critical when coordinating multiple workstreams*
- *Repeated end-to-end dress rehearsals are the most effective way to de-risk a cutover, allowing processes, controls and timings to be refined under realistic conditions.*

Skill Sets

- *Programme Management*
- *Operating Model Integration*
- *Data Migration*
- *Cutover Planning and Execution*
- *Data Reconciliation*
- *Stakeholder Management*

Themes

- *Mergers & Acquisitions*
- *Banking Integration*
- *Data Migration*
- *Programme Delivery*
- *Corporate & Investment Banking*

The client, a large retail, corporate and investment bank, acquired the corporate banking book of a large international bank's local operations – a strategically significant acquisition. In addition to the client relationships and their associated assets and liabilities, the transaction required employees, operational processes, technology and data to be integrated into the client's operating environment in a controlled, timely and sustainable manner.

At the outset, the programme was highly complex and lacked the structure needed to support effective decision-making and a consistent approach to migration. Key gaps included:

- No clearly defined governance structures, delivery workstreams or accountabilities.
- Limited visibility of the current-state operating model across data, technology, people and processes.
- An incomplete view of the dependencies the migration would need to resolve.

Due to the interconnectedness of the integration, decisions on data, technology, processes and people affect migration decisions, approach, and timelines, meaning no workstream could be managed in isolation. Regulatory approvals added a further critical dependency for information sharing and migration planning.

Programme Delivery & Data Migration

Monocle established an integrated programme delivery capability, combining programme leadership, governance oversight and hands-on execution across 22 interconnected workstreams and more than 300 programme resources from both banks:

- ***Programme leadership & governance:*** Led programme planning, reporting, dependency and risk management, and facilitated governance forums, escalations and executive decision-making.
- ***Central PMO:*** Coordinated delivery across all workstreams, including the logistics for large-scale rehearsal and cutover events, enabling delivery teams to focus on streamlined execution.
- ***Data migration leadership:*** Led the migration workstream end to end, covering strategy and planning, data analysis, source-to-target mapping, reconciliation design, testing and production readiness, moving data from several source applications into more than 20 target systems.
- ***Embedded project management:*** Placed project managers across key business, operations and technology workstreams to drive delivery and keep outcomes aligned.
- ***Dress rehearsals & cutover:*** Designed and ran several dress rehearsals and managed a cutover plan of more than 1,000 activities spanning every workstream.

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Tangible Benefits

Monocle helped deliver a multi-day cutover across 22 workstreams, achieving a 98% post-go-live query closure rate.

- Integrated the acquired client relationships, employees, assets and liabilities into the client's operating environment, expanding its corporate and investment banking footprint.
- Achieved stable post-implementation operations, supporting business continuity and regulatory compliance throughout the transition.
- Reduced execution risk by testing migration processes, controls and governance repeatedly under realistic conditions before cutover.
- Assisted in coordinating the introduction of a new API capability to improve system connectivity in the target-state operating model.
- Established a scalable governance, migration and execution framework for future integration initiatives.

Integrating an acquired bank is one of the most complex forms of change a financial institution can undertake. Every client, account, process and system must move across without disrupting customers, regulators or the business.



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