appian

## Profiles in Appian Excellence: Aegon's Intelligent Automation Team

Aegon supports its digital distribution channels and growing demand for customer self-service capabilities through their Intelligent Automation Team (IAT): a Center of Excellence which enables digital automation and innovation.

"Automation initiatives are not easy and, with lots of teams launching projects in different groups, we risked making the same mistakes repeatedly. Building a central automation advisory group allowed our project teams to be independent and agile, but also benefit from experience and hard-won expertise", says Boris Buis, the IAT BPM Lead.

Aegon's CoE journey.

The IAT was not created overnight, but rather evolved into its current form over several years. Aegon began their Appian Journey in late 2015 with an initial project within the Pensions Department - that ultimately went into production in early 2016. This success was followed shortly by a second application launched in the Life Protection Department.

At this point, "we saw more and more interest and initiatives coming-up as Appian was positioned as a target solution for our BPM space. There was no clear platform responsibility for central activities (licence management, platform upgrades, etc.), so we added a virtual Appian maintenance team to handle those activities."
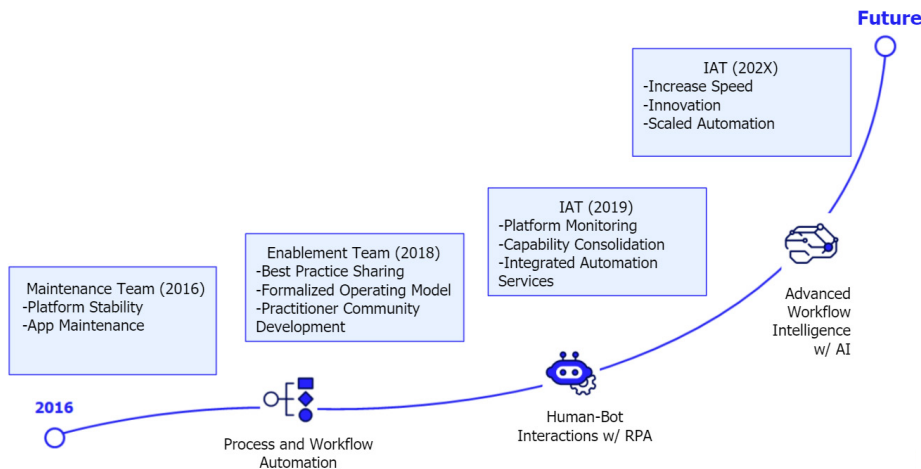
The maintenance team was successful for a time, but eventually Aegon noticed teams "reinventing the wheel over-and-over again when working with Appian". As more teams with a greater variety of maturities began working with Appian, build quality suffered as the number of duplicative development incidents increased. Thus, in 2018, Aegon created the Appian Enablement team.

Industry:
Financial Services

Headquarters:
The Hague, Netherlands

Website:
aegon.com

Number of employees:
+3,500

Boris Buis   **Frans Stuifbergen**

Intelligent Automation and BPM Leads

This new team was tasked with bringing Appian knowledge and practitioners into a common community. Within the DevOps space, they also introduced governance, security and provisioning across the organization.

"At this time, we had 20 applications and 10 teams working with Appian and were evolving our CI/CD pipeline. We made the business case to scale-up the Appian Enablement team to support creating reusable components, leading a community of practice to share knowledge and conduct platform onboarding and training. By this point, I actually believe we were already late, which, in some cases, resulted in poorly scalable applications with higher maintenance costs."

Towards the end of 2019, Aegon also added Intelligent Automation Services to the team's profile and reorganized under the new title of Intelligent Automation Team (IAT). Boris noted that "the goal was to bring these capabilities closer together under one umbrella and with a more service oriented posture".

In the future, Aegon wants to move the IAT value proposition towards a 'hyper-automation' services portfolio; enabling business units to increase speed and innovation.

IAT overview and responsibilities.

Aegon's IAT has 8 total FTEs (2 dedicated to Appian) and enables more than 16 federated DevOps teams within the business to support over 50 applications. They are responsible for conducting activities across 5 main areas including: Governance and reporting, delivering intelligent automation services, training and skills development, quality/benefits tracking, and inspiring and advising.

- **Governance and reporting.** The IAT ensures Appian deployments are completed according to Aegon-wide CI/CD processes. Specific reporting activities include: monitoring core metrics on platform health, incident reporting, licence management and automated provisioning.

- **Delivering intelligent automation services.** The IAT works directly with business units to identify and build common automation capabilities and services. For example: "We are currently working on an intelligent document processing solution that uses multiple automation capabilities, but is ultimately delivered as a single service. This empowers our business units with a menu of capabilities with a small investment and reduces time-to-market."

- **Training and skills development.** For training, Aegon's IAT always attempts to align participant capabilities and Aegon-specific requirements with the type of training provided. For example, the IAT created an in-house RPA training program tailored to Aegon's specific needs. "You can't just send people to training and expect success. You need to provide support throughout the learning journey- which should include mentoring and guidance after any formal training concludes."

> We created a BPM-RPA framework that allows users to easily integrate our robotic workforce to their Appian processes. All technical integrations, error handling, callbacks and marinating are taken care of."
>
> Boris Buis, Intelligent Automation and BPM Lead

8 total FTEs (2 Appian)
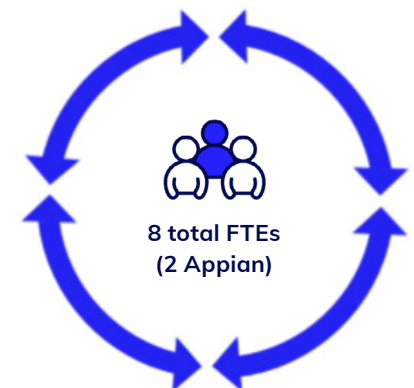
- **Quality/benefits tracking.** The IAT conducts regular health checks for applications within their portfolio and reviews these findings with application teams. Here, they outline future plans regarding application health management. Aegon's IAT also tracks stakeholder satisfaction and benefits delivered by automation solutions.

- **Inspiring and advising.** The IAT works with business units to identify unmet needs and advise on new application or capability additions. Also, based on new Appian capabilities, they proactively pitch new solution ideas to business partners and help them see the art-of-the-possible. "Having 'Inspiring and Advising' be part of our services portfolio enables us to work alongside the business to create smart solutions. A recent example is the creation of a self-service task that lets business units directly request additional customer data instead of going through an intermediary."

Success measures.

Having success measures in place not only holds the IAT accountable for their performance, but also enables them to communicate expectations and successes to stakeholders. Aegon measures their progress every 100 days to ensure they are moving in the right direction and achieving core goals.

The results of these metrics are coupled with customer satisfaction surveys and are evaluated for continuous improvement and a drive towards increasing value.

Lessons learned.

Adapt quickly to changing dynamics. "IT is moving fast and a platform like Appian evolves quickly. Have a dot on the horizon to work towards, but be ready to adapt to change. For Aegon, that means staying ahead of the game, so that when Appian releases new functionality we are ready."

Promote a high quality platform. "Aegon's CoE is responsible for platform health, so we charge them to protect a platform quality. They decide and communicate core Appian competencies development teams need to maintain. This mitigates risk and keeps the platform stable."

Develop your CoE early in your journey. "Setup centralized responsibilities from day one. It doesn't have to be dedicated team, but think about what your portfolio growth is going to look like because it happens fast. By the time there's a burning need, you're already too late."

Aegon Success Measures

Internal Stakeholder Satisfaction

Solution Value Creation

- Attainment and confirmation of projected benefits

Platform Stability

- Uptime
- # of incidents
- Platform up-to or out-of date

Training Success from Workshop

Think you have an Appian best practice? Interested in sharing it with the Appian Community? Email us at bestpractices@appian.com to schedule a research call with our team.