

Zurich Cantonal Bank: Mastering Regulatory Compliance



Leadership and Innovation in Swiss Banking

Established in 1870, Zurich Cantonal Bank is a major player in the Swiss banking industry.

With CHF 450 billion in total assets under management and a robust team of over 6,000 employees, it has cemented its status as a leader in universal banking, offering a vast array of products and services to its clientele.

The bank employs a centralized IT architecture team of 20 architects, whose focus on agility and cost-effective solutions ensures the bank's ability to adapt to the ever-evolving financial sector, maintaining its competitive edge while delivering exceptional service to its clients, both locally and internationally.

Key information



INDUSTRY

Financial Services



REGION

EMEA



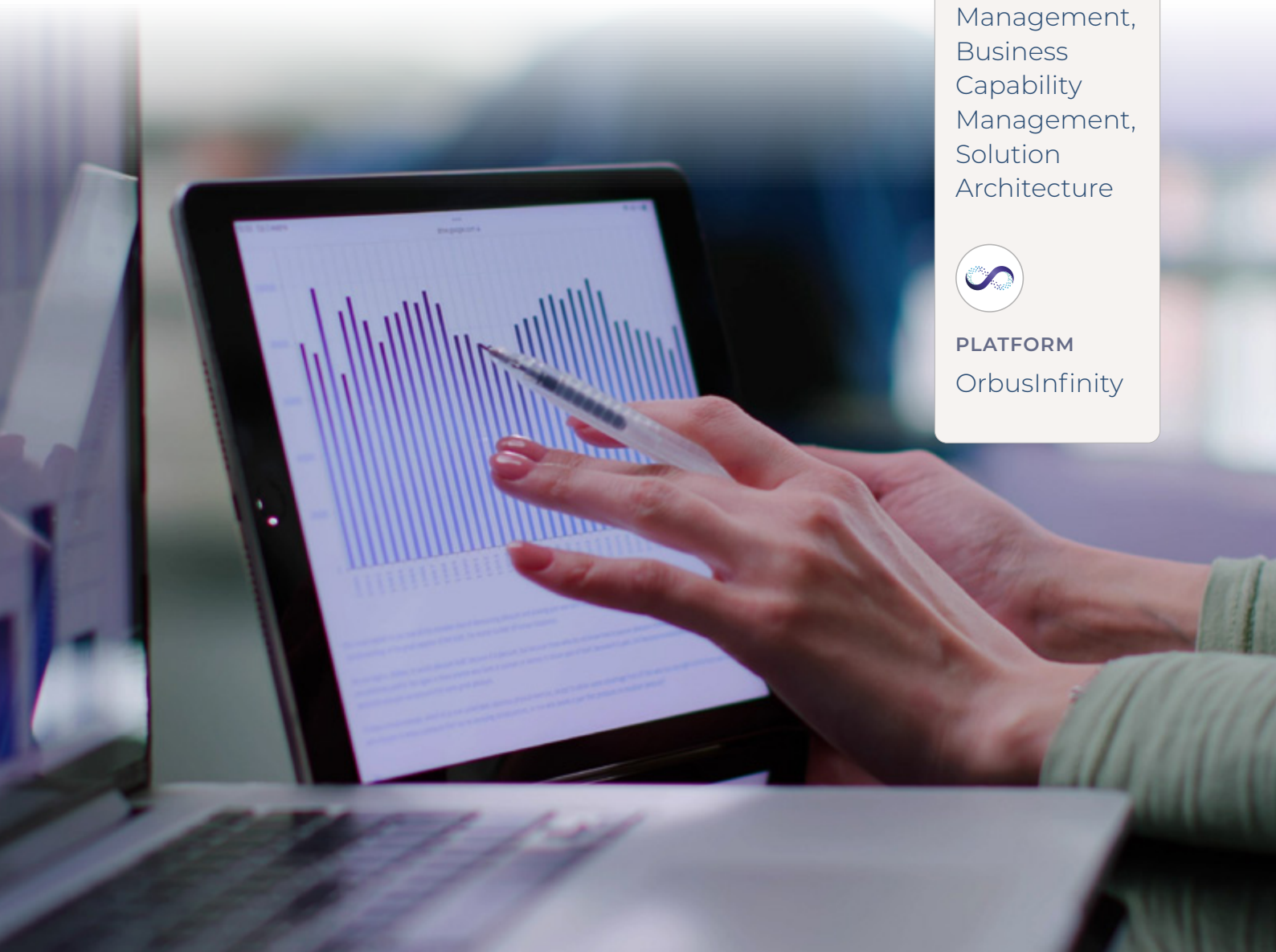
USE CASE

IT Portfolio Management, Business Capability Management, Solution Architecture



PLATFORM

OrbusInfinity



Navigating an Increasingly Complex Banking Landscape

In recent years, the banking industry has become increasingly complex and tightly regulated. To remain compliant and competitive, banks must adeptly manage their extensive IT landscapes.

This complexity is compounded by the rapid adoption of agile development frameworks, which have transformed the way IT architects interact with business and engineering teams. To address these challenges, regulatory compliance has become a critical, daily task that requires efficient and accurate management of IT resources.

For Zurich Cantonal Bank, the need for a sophisticated tool like OrbusInfinity became apparent. The bank sought a solution that could not only streamline the management of its complex IT landscape but also enhance its compliance capabilities in the face of increasing regulatory scrutiny.

The bank needed a platform that would enable agile management of its IT infrastructure, quickly providing answers to questions from regulators and external auditors, and reducing the overall effort involved in compliance activities.

Choosing OrbusInfinity

Zurich Cantonal Bank has used Orbus Software solutions since 2011, valuing their alignment with Microsoft technologies and ability to integrate structured data management with manual modeling and visualizations. Having used the on-premises solution iServer for several years, the bank decided to migrate to Orbus's cloud-first platform, OrbusInfinity.

The bank's decision to implement OrbusInfinity over other available solutions was driven by its comprehensive features that provide excellent transparency across IT artifacts combined with visual modeling capabilities. This enables the bank to meet regulatory requirements and ensure a proactive approach to IT landscape management.

The platform also offered capabilities for structured data management and the flexibility to conduct manual modeling in Visio and create custom visualizations using Power BI. This combination was crucial for meeting the diverse needs of the bank's stakeholders, allowing for both data-driven visualizations and tailored, manual visualizations for specific audiences.



Migrating to the Cloud

The journey from iServer to OrbusInfinity unfolded with meticulous planning and precision, ensuring operational continuity by maintaining the old iServer installation until the new, cloud-based OrbusInfinity platform was primed to take over.

The team was able to move all existing visual models in the form of Visio files to a read-only archive on the new SharePoint site. This ensured that the bank's rich history was preserved and made accessible in a new, dynamic environment.

Alongside the technical shift to OrbusInfinity, the bank embarked on a critical training initiative to ensure its teams were ready for this new chapter. Orbus stepped in to provide in-depth admin training, while the bank's own IT experts led training for the broader user base. This approach equipped all team members with the skills needed to leverage OrbusInfinity effectively.



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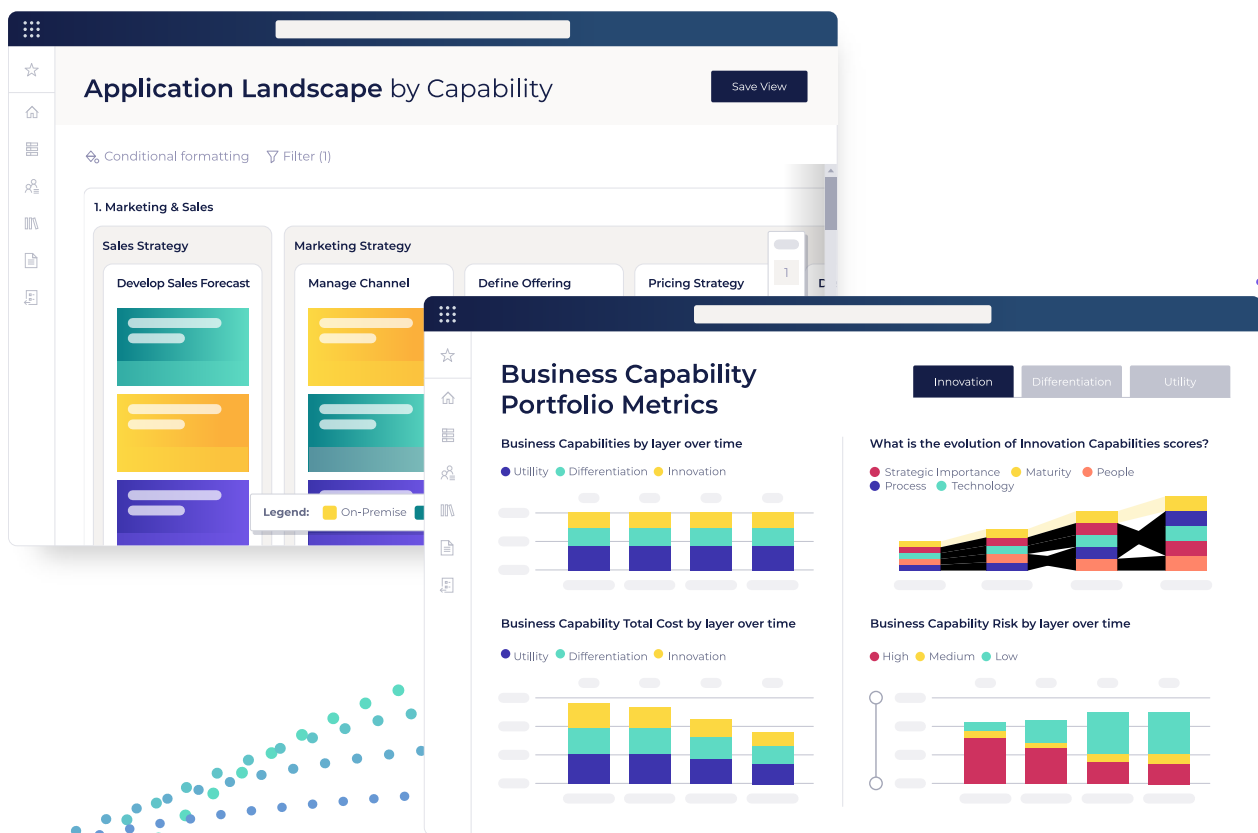
Our experience with the Orbus team during the migration was incredibly positive. Their expertise and support played a crucial role in ensuring a smooth transition, affirming our decision to continue to partner with them.”

- Urs Müller, Enterprise Architect

Transformative Results with OrbusInfinity

The adoption of OrbusInfinity has yielded transformative results for Zurich Cantonal Bank:

- **Significantly improved accessibility and user engagement** with IT data.
- **Streamlined document and workflow management** through SharePoint integration.
- **Customized IT landscape management** aligning with the bank's operational practices.
- Enhanced capability in **adapting to and managing regulatory changes efficiently**.
- **Increased responsiveness** to questions from external auditors and regulators.



Enhancing IT Management

The platform's immediate impact on accessibility and user experience significantly enhanced how users interact with data, fostering greater engagement.

Its seamless integration with SharePoint and intuitive document and Visio file management streamlined workflows, making IT architecture management more efficient.

OrbusInfinity's capability to manage manual and semi-manual modeling, along with its comprehensive views and management of data, has been pivotal in meeting the rigorous demands of internal audits and regulatory bodies.

The platform provides a robust repository that consolidates data from various sources, facilitating easy navigation and management of the bank's IT landscape.

This comprehensive data management ensures that customer data is securely managed, aligning with the highest standards of banking regulation.



Mastering Regulatory Compliance

OrbusInfinity has proved indispensable in tracking and adapting to regulatory changes. Its flexible repository can integrate data from diverse stakeholders and sources, which simplifies the process to update and navigate the bank's IT landscape in response to regulatory adjustments, ensuring compliance is always maintained.

For instance, when the bank's IT architecture team decides to add/delete a technology from the bank's standard list, OrbusInfinity enables the bank to quickly generate the necessary documentation and evidence to check if the technologies used in production are all compliant with the bank's standards.

OrbusInfinity has also enhanced the bank's responsiveness and productivity. The tool's ability to prepare customized views of the IT architecture on short notice supports the bank in promptly addressing follow-up requests from internal and external audits and regulatory reviews.

OrbusInfinity has not just met but exceeded Zurich Cantonal Bank's expectations, reinforcing its position as a critical tool for managing the complexity of the bank's IT architecture.



OrbusInfinity is a great help. It's the core tool that we use across the IT architecture department."

- Claus Hintermeier, Head of IT Architecture

Navigating Tomorrow with OrbusInfinity

As Zurich Cantonal Bank looks toward the future, OrbusInfinity will form an integral part of the bank's growth and adaptation strategy via:

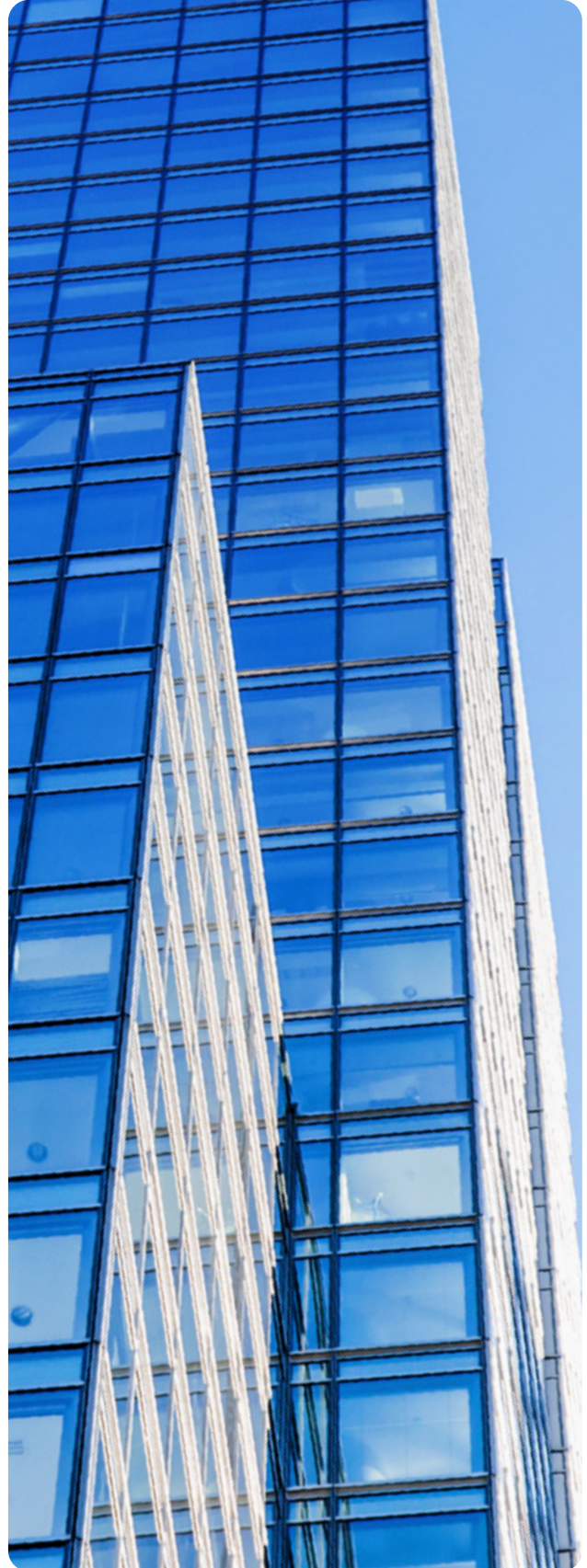
- **Advanced technology mapping and impact assessments**, enriching the repository with more comprehensive data sources.
- **Strategic application and technology lifecycle planning** in response to technological advancements like AI, cryptocurrency, and agile methodologies.
- **Enhanced cybersecurity measures**, leveraging a thorough understanding of the IT landscape to mitigate risks.

OrbusInfinity will be pivotal in visualizing relationships for architectural decisions, ensuring the bank can navigate the challenges of the banking industry with strategic agility and sustainability.



It's about seeing the bigger picture. OrbusInfinity helps us visualize how each piece fits into our broader context, motivating our team and sharpening our focus on agility and sustainability."

- **Claus Hintermeier**,
Head of IT Architecture





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About Orbus Software

Orbus Software is a leading global provider of enterprise transformation solutions. We aim to empower customers with a strategic decision-making platform to successfully manage complex change. Our OrbusInfinity platform enables leaders to deliver business objectives, innovate faster, and ensure enterprise resiliency, while supporting them to make more informed, responsible, and sustainable business decisions.

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