

Dept. IT R&D	Newsletter article
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Embracing the Future, IT R&D Announces Game-Changing Initiatives

Globally Re-Inventing the IT Workplace to Deliver State of the Art Products, Services

The IT game face at AmeriSecurities is changing. In keeping with the firm's standing as a world leader in the financial services industry, the IT Research and Development group has rolled out a set of initiatives that when implemented will invoke a sea change in the way IT is done around the world at AmeriSecurities .

These five programs, dubbed *game-changing* initiatives, are designed to collectively put a new stamp of quality and integrity on the products and services provided by IT globally. Announced in early 2006, these initiatives stress renewed emphasis on speed, efficiency, security and – above all – high quality customer service.

Implementation of these five game-changing initiatives is to run over the next several years:

- **Virtual workforce**
- **Zero-latency enterprise**
- **IT economy**
- **Extranet**
- **Enterprise immune system**

Future communications will elaborate on the initiatives, which are summarized below. Essential to the success of the overall program is buy-in from the worldwide IT staff along with the recognition that a global team effort is a core requirement towards its effectiveness.

Thinking Globally, Working Virtually

The trend away from the traditional desk-and-chair workplace is no longer a prediction – it is a virtual revolution that's well underway. Today's challenge is no longer how to electronically link technology developers and support personnel

scattered across continents. It's finding efficient, seamless and hassle-free ways of doing it.

Only by removing the geographical disconnects of time and place can AmeriSecurities rapidly assemble and manage project teams around the globe. A vigorous, *coordinated* approach to worker connectivity embracing cutting edge communications technology will establish an effective *virtual workforce* at AmeriSecurities . New initiatives supporting the virtual workforce include:

- A *virtual community platform* for multi-media team collaboration, incorporating text, voice, white-boarding and high-definition video conferencing
- Closely integrated within the virtual community platform will be a *virtual information environment* that goes “beyond being there” by providing multiple windows of related information to participants during ongoing communications
- Next generation interaction channels for trading, customer and IT communications
- Enhanced mobile device capabilities

These and other initiatives target the removal of geography from the IT project and support equation. Once implemented, the streamlined virtual workplace experience will reduce product time to market, improve customer service and uncover substantial value-added efficiencies that emerge when daily communication glitches between team members are minimized.

Zero-Latency Means Zero Delays

Rapid response to customer requests is now among the primary differentiators between leaders and lagers in the financial services market. Factor in customers' value-driven demands for product customization and a dilemma arises: how does a world-class financial services player deliver increasingly customized products at ever higher speeds?

The *zero-latency enterprise* initiative addresses this challenge with a concerted program of deliverables. Designed to increase customer satisfaction through the streamlined deployment of customized systems, this initiative includes:

- Automation of the software development cycle, and incorporating rapid assembly of commodity components to create custom systems
- Automated, service-oriented computing and information (including service delivery and data consolidation, layout and distribution standards) that simplify information access across platforms
- Server, storage and network virtualization in both the development and production environments to drastically reduce product development and delivery times
- Increased capacity, high-performance network and server components to accommodate higher transaction volumes

In addition, a real-time platform catalog, matching application profiles with technology platforms, will be developed to define and clarify choices among the available application solutions. Accounting, too, will be revamped and improved, with retooled IT service metering and chargeback providing much needed clarification of services rendered and costs incurred.

The Economics of Efficiency

Today's marketplace requires a high-efficiency approach to resource supply and demand dynamics. A well-oiled IT organization must manage its resources tightly if costs are to be contained and resources are to be allocated with optimum efficiency and minimum waste. The *IT economy* initiative will push operational

efficiency to industry leadership levels, ensuring that at any moment the IT organization knows precisely what it has and how it's being used.

Allocations of services, components and staffing all require tight monitoring to ensure cost containment and efficient capacity distribution. The IT economy initiative embraces several initiatives, including:

- Creation of multiple *virtual resource markets* that concisely monitor the supply and demand of IT resources as well as facilitate the heightened liquidity of resources through rapidly-moving market dynamics
- A customizable executive dashboard providing quick, up-to-date visibility into project status and resource availability
- Enhanced accounting and monitoring of service level agreements, including ongoing assessment of SLA metrics as well as service capacity management
- In conjunction with the *portfolio management system* implementation, real-time assessments of IT assets as well as profit/loss and risk evaluations

By constantly measuring allocation of its resources and their profitability – and delivering that information to management in a market-driven, readily accessible medium – the IT organization can evolve from a speculative buyer and seller of indeterminate inventory to smart and lean machine providing crisply defined IT business support tools.

Between the Net and a Hard Place

A secure Internet connection is today the dominant avenue of delivery for applications and information to banking clients. Providing a safe and reliable highway for client connection that is both painless to use and rapidly realized is the goal of the IT organization's *entranet* (i.e., enterprise internet) initiative.

Serving as a “middleware” platform between service provider and client, AmeriSecurities' s *entranet* initiative will provide a secure, high-performance architecture for linkage between corporate server applications and the browsers of authorized customers. These improved

connection services will also further enable AmeriSecurities representatives when remotely presenting products to prospective customers. The plans include:

- Provisions for enhanced delivery of applications, real-time data display and client interaction
- Tool kits for enabling real-time graphics and rich-client application interfaces
- Integration of an enterprise search engine that provides search capabilities across local and network-hosted data repositories

The successfully implemented intranet initiative will provide not only more effective application delivery, but will also impact and improve connectivity to remote offices, home workers and traveling employees. Network security and service reliability improvements are goals that will be built into each intranet-related deliverable.

Developing Immunities

Rather than a collective of disjointed components and teams, the IT organization can be more constructively seen as an adaptive *ecosystem*, reacting and evolving in response to the changing business environment – *and* to unforeseen threats. Infusing the ecosystem with automated defense and protection devices is what the *enterprise immune system* initiative is all about.

Security is a top priority built into all IT initiatives. The thrust of the *enterprise immune*

system plan is to utilize state of the art technology across all platforms and support systems to ensure that attempts at unauthorized intrusion are met squarely and effectively at the initial point of contact rather than after the fact. And, when immediate counter-threat action is required, that tools are in place for a swift notification and system correction. The plans include:

- Automated network intrusion recognition and response systems
- Establishment of a vigorous identity management service for authentication and authorization, along with granulated entitlement service for automating authorization certification
- Building an IT-wide security operations center for coordinated and comprehensive security services oversight

The collective impact of all five game-changing initiatives will be broad and deep across the entire IT organization. Our customers demand it, and our business requires it. From a persistent team effort to put the customer first through global cooperation, cutting edge technology and world-class people resources, the new face of AmeriSecurities IT will emerge.

For further information on the game-changing initiative project contact <name, email> at <phone number>.

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