

# Ramping up Camunda Usage at NBC: Successes and Failures



**Tarik Choufa & Felix Carrier**

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5-6 October 2022 | CamundaCon 2022

# Agenda



- **About the National Bank of Canada (NBC)**
- **History of Camunda at NBC**
- **Situation as of now**
- **Roadmap**
- **Q&A**



## About the National Bank of Canada

**6th largest bank in Canada**

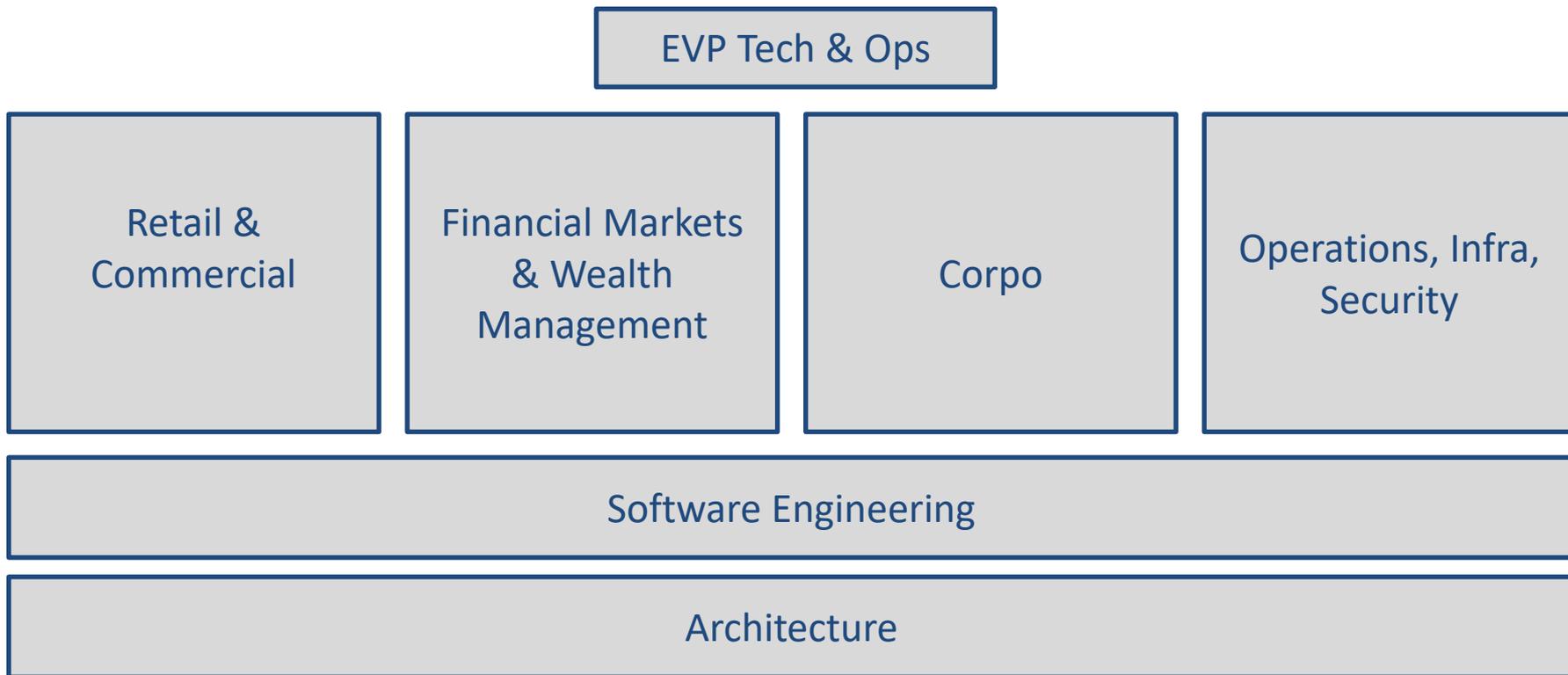
**~ 25k employees**

**Based in Montréal**

**Full suite of products and services: Personal, Commercial, Insurance, Wealth Management, Investment Banking, etc.**

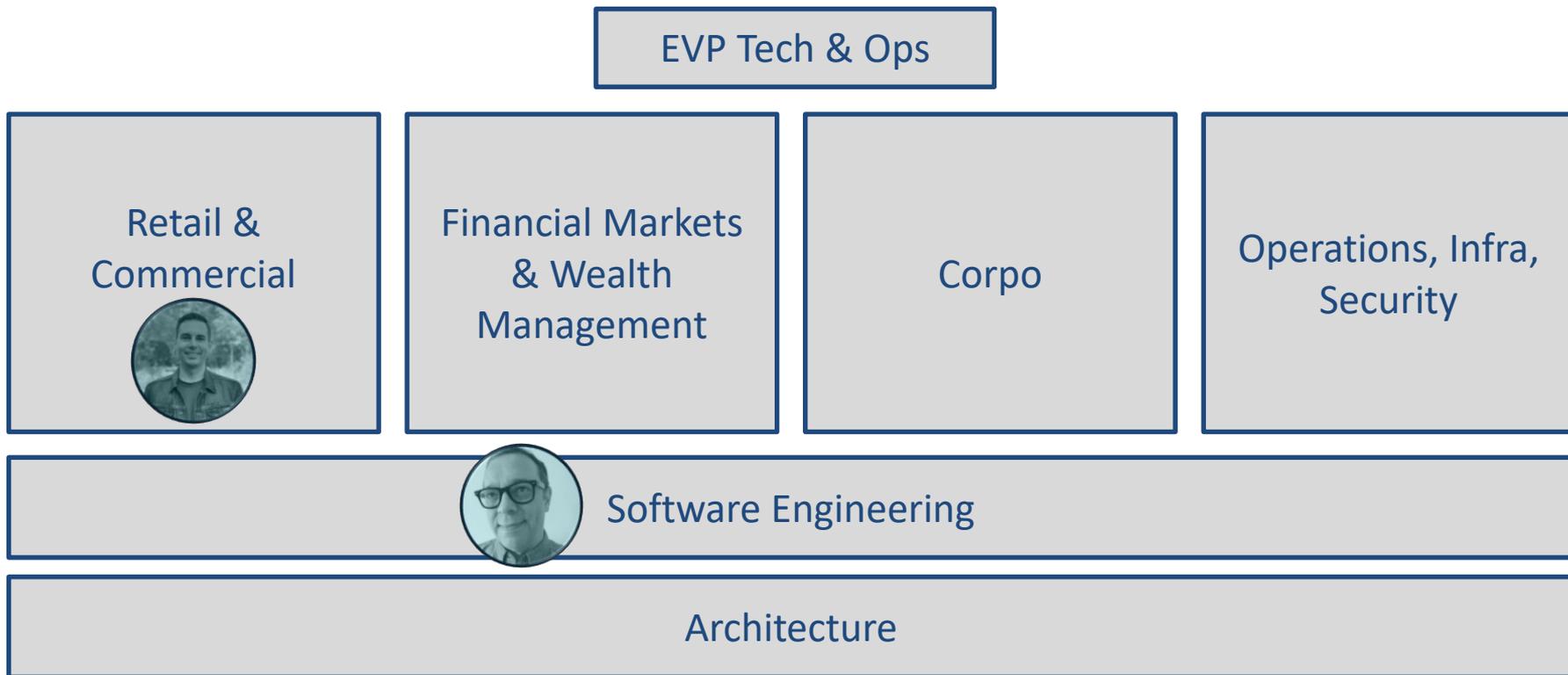
**Not to be confused with the *Bank of Canada*. We are not a central bank.**

## IT Org chart\*



\* Simplified for clarity

# IT Org chart\*



\* Simplified for clarity

# History



3-4 years ago: small community of Camunda users

Community goes instinct; usage of Camunda pretty much stagnates

Camunda expertise rests on the shoulder of a few power-users

Early 2021: Execs want to accelerate process automation. Camunda identified as enabler. Though not everybody can become a Camunda expert.

August 2021: Retail&Commercial creates their own in-house CoE (2 employees)



Objective: **Scale process automation and accelerate delivery**

## Early days of the CoE



### 3 goals for the early days:

- Build in-house expertise
- (re)Build a community of BPM/Camunda enthusiasts
- Governance foundations



## Early days of the CoE: building in-house expertise

- No prior Camunda experience
- Hire consultants (Camunda partner) to raise our level of expertise. 5 months full time.

Good	Could have been better
Level of expertise	<ul style="list-style-type: none"><li>- Concrete projects to work on</li><li>- Length; too long (5 months)</li><li>- Full-time vs On-demand</li></ul>



## Early days of the CoE: building a community

- **Bring the community back to life**
- **Building a bigger tent: IT, Ops, business**
- **Mix of technical, governance, process modeling**
- **1 hour; Every Friday**

Good	Could have been better
<ul style="list-style-type: none"><li>- It works</li><li>- Great forum for governance-related questions</li><li>- Newbies have a place to ask questions</li></ul>	<ul style="list-style-type: none"><li>- More business process modeling; less IT-centric</li></ul>

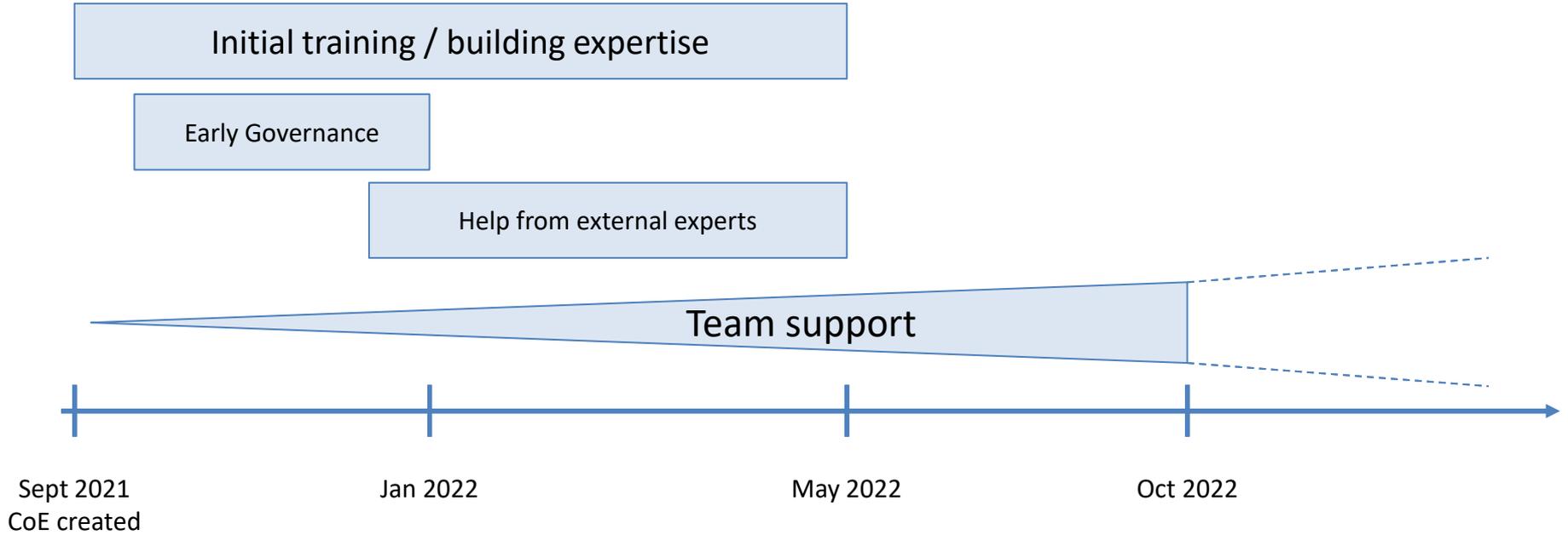


## Early days of the CoE: building governance

- If you want to scale, you need some level of standardization
- Camunda is developer-friendly; it also means there are countless ways to do the same thing
- Who decides? Who has the authority?

Good	Could have been better
Think about standardization	CoE working on something they have no authority over

# CoE Timeline



# Outcomes



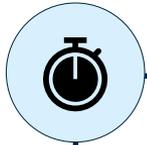
## Demand is growing

Mission-critical processes are moving to Camunda



## Community

40+ meetings thus far  
100+ have participated



## Time to setup new projects

Before: weeks  
Now: days



## Number of projects

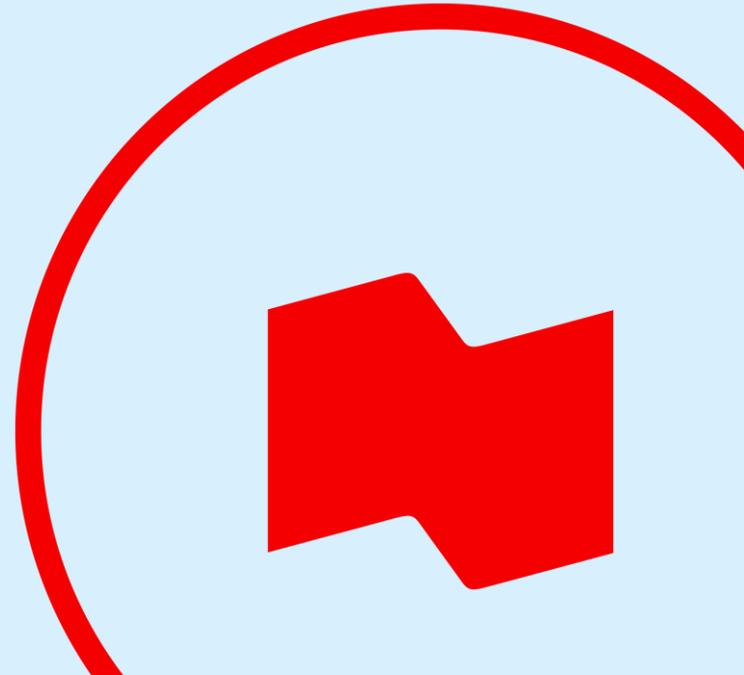
27 existing  
4 going to prod (+15%)  
(Retail & Commercial only)

## Extra lessons & Outcomes



- **Finding Camunda expertise is hard; teams often train existing talent instead**
- **Writing internal documentation about technical best practices has its limits.**
  - Easy to fall into the trap of reinventing the wheel
  - Is the docs going to be read by anyone?
- **Chicken and egg problem**
- **Building a community pays off**

**Governance**



# Business Process Governance



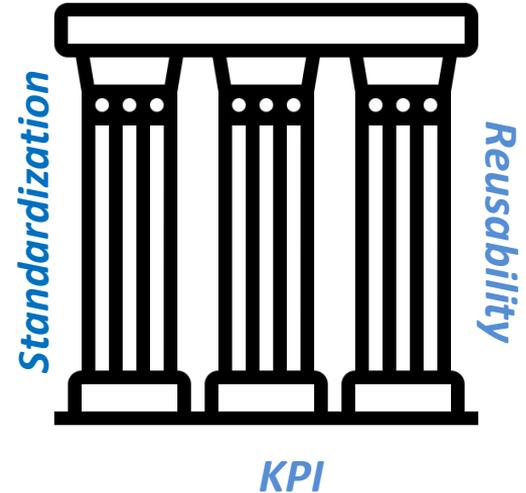
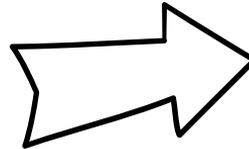
## Definition of business process governance (bpminstitute.org)

Business process governance is the organizational framework to establish and maintain end-to-end process performance in an organization.

## Why introduce BP governance at the bank?

The main goal is to increase Business process Maturity Model Level (**BPMM**)

Our 3 governance pillars



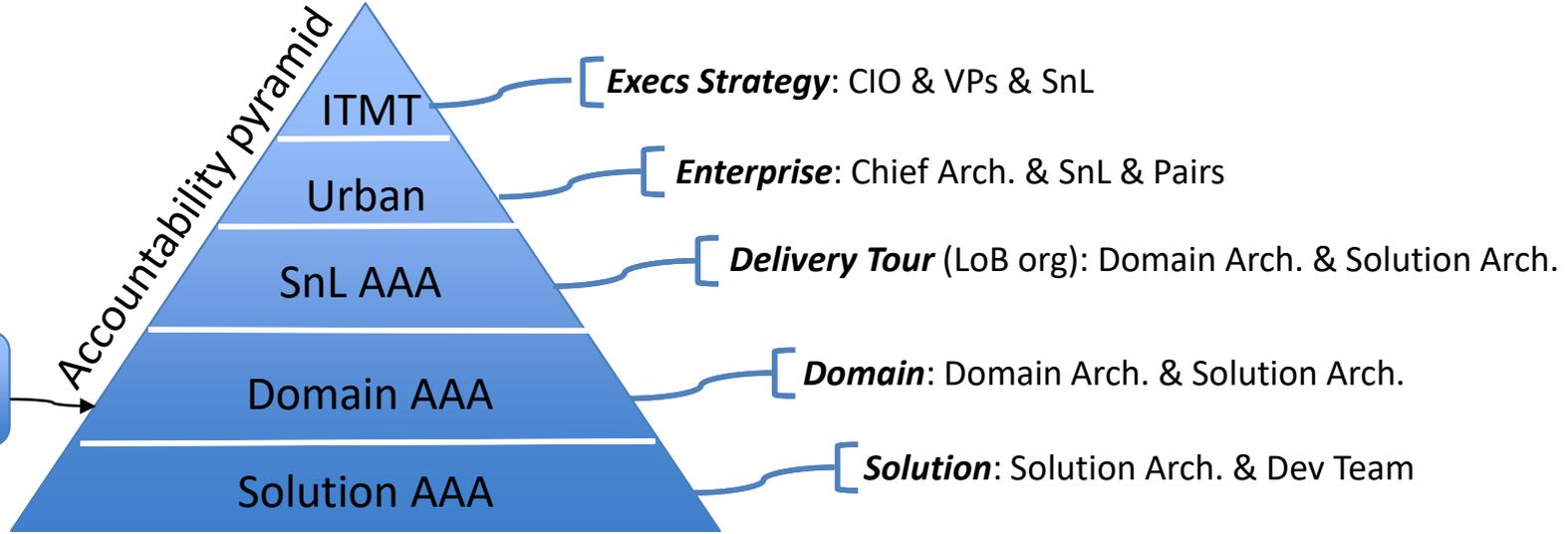
# Business Process Governance



## IT governance at the bank



Software Engineering  
Domain

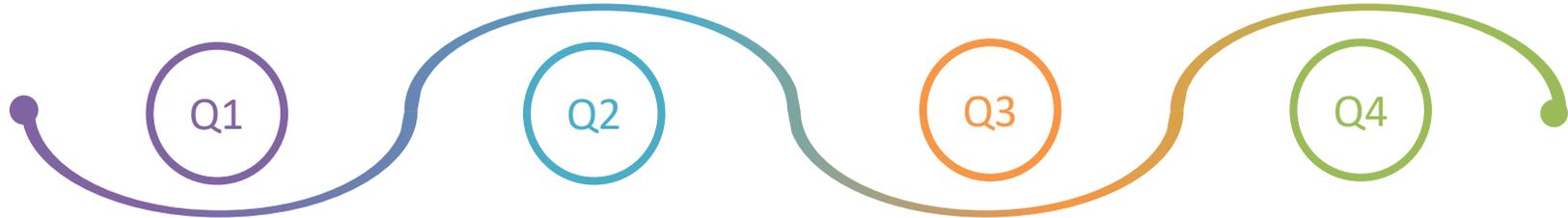


ITMT : Information Technology Management Team  
AAA : Architecture Alignment & Accompaniement  
SnL : Strategy & Delivery

# Business Process Governance



## Governance plan 2022



### MILESTONE

- ✓ Camunda NBC projects inventory
- ✓ Camunda use cases inventory
- ✓ Community
- ✓ Communication channels

### MILESTONE

- ✓ Tooling
- ✓ Domain
- ✓ Business capabilities
- ✓ Structure
- ✓ Decision process
- ✓ Training path
- ✓ Gov. Topics (WIP)

### MILESTONE

- ✓ Offers
- ✓ Positioning:
  - Camunda 8
  - Architecture type
  - Platform scope
  - Business Data vs process
  - Data analysis
  - User Task

### MILESTONE

- ✓ Foundation
  - Inner sourcing / monorepo
  - AuthN/AuthZ
  - Global metrics collection
  - POC Optimize/AWS Elasticsearch
  - Documentation template



## Understand actual state



### NBC projects identification

#### Challenge

- No centralized camunda platform

#### Solution

- Source control scan
- Existing Excel list
- Remedy – CMDB query
- Human communication

#### Outcome



30 projects



26: Cloud



4: OnPrem



# Business Process Governance

## Understand actual state



### NBC use cases identification

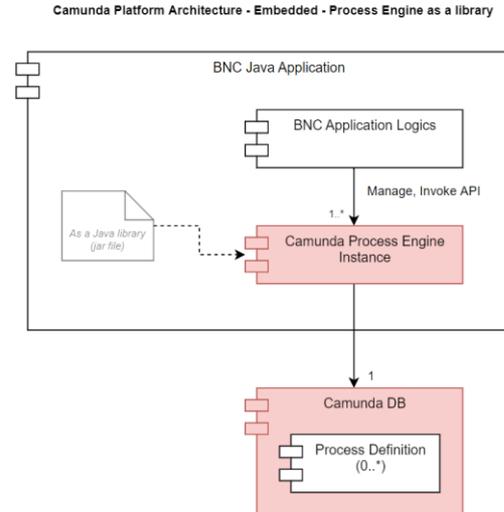
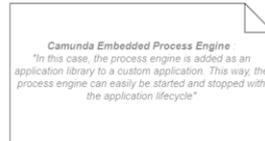
#### Challenge

- No centralized camunda platform
- Documentation not available for all projects

#### Solution

- Confluence (internal wiki) scan
- Human communication

#### Outcome



# Business Process Governance



## Socialization



### Channels

#### *Challenge*

- Broke sillo

#### *Solution*

- Advertising
- Human communication

#### *Outcome*



BPM Tech: weekly Teams meeting (thanks to CoE)

Yammer IT channel



# Business Process Governance



## Tooling



### Tools

#### Challenge

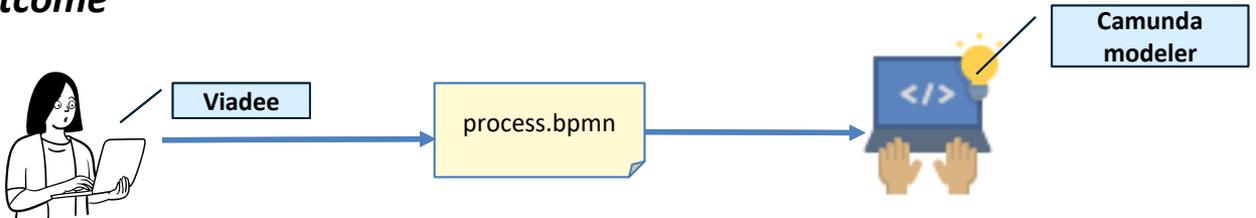
- Business tool is Visio
- IT tool is Camunda modeler

#### Solution

Using XML portable format

- Confluence Viadee plugin  Business
- Camunda modeler  IT

#### Outcome



# Business Process Governance



## Governance structure

### Challenge

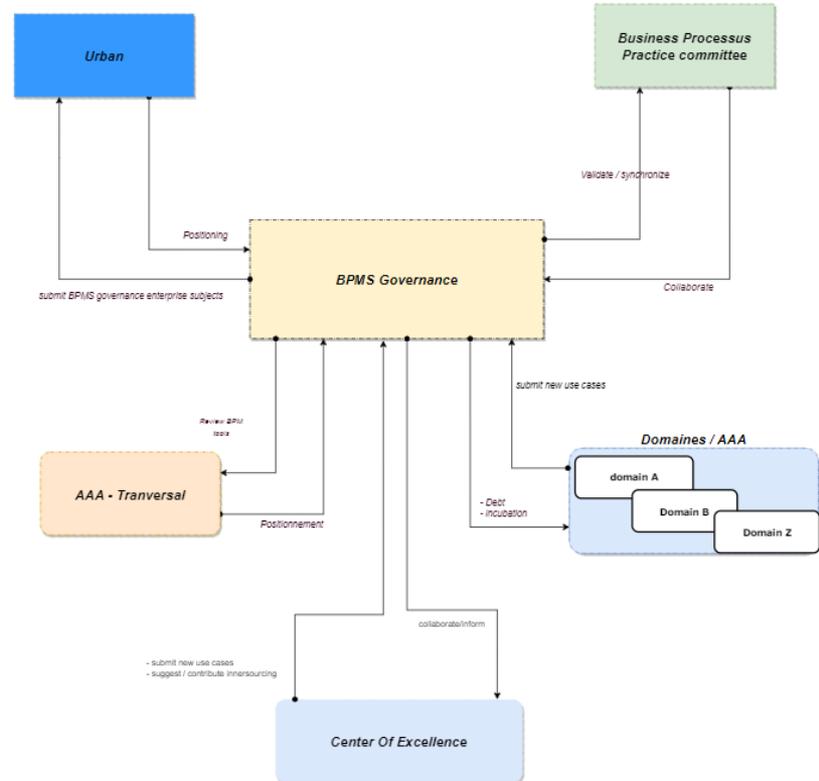
- No RACI
- Identify the right stakeholders
- Cultural change management

### Solution

- **Document RACI**
- **Build Governance committee**

### Outcome

RACI & Committee



# Business Process Governance



## Governance structure

### Challenge

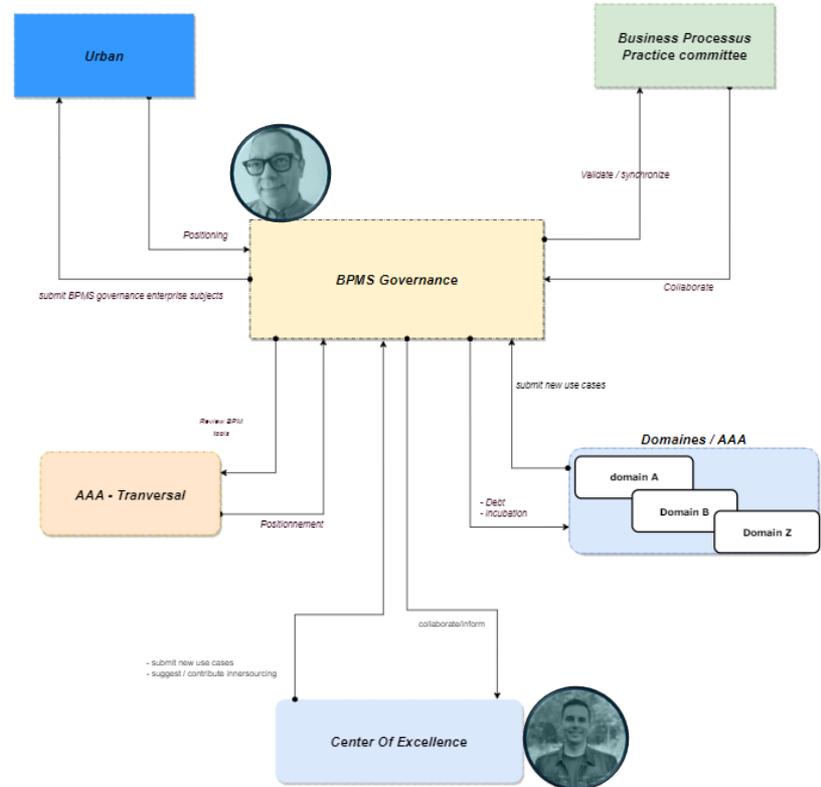
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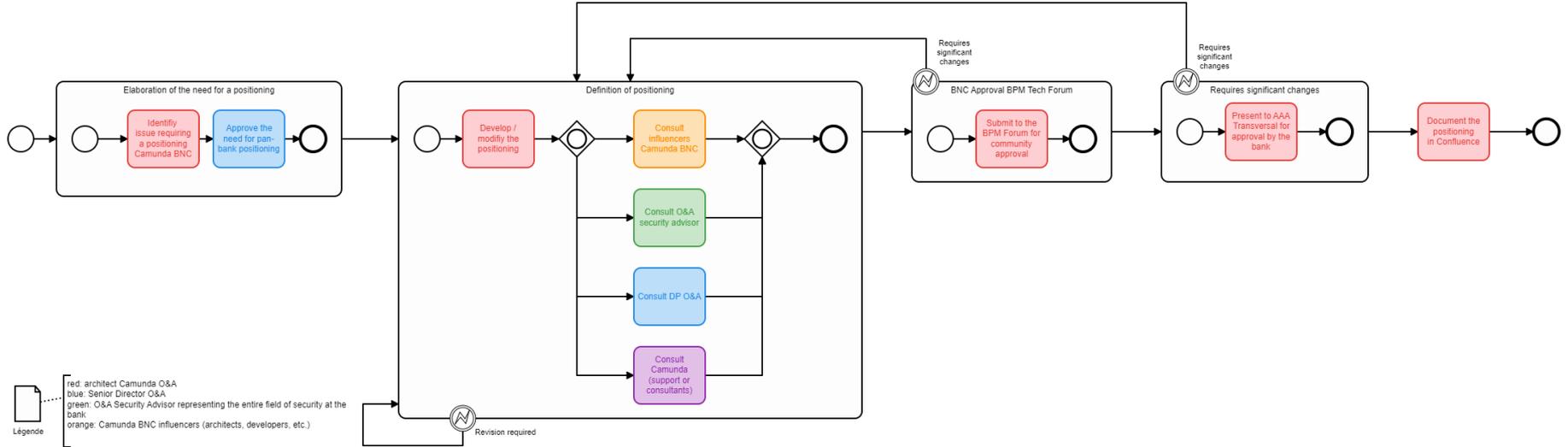
RACI & Committee



# Business Process Governance



## Governance Decision Process



# Business Process Governance



## ✓ Governance positioning

Topic	Challenge	Position
Camunda 8	<ul style="list-style-type: none"><li>• Missing features</li><li>• Actual application architecture</li></ul>	<ul style="list-style-type: none"><li>• WIP work closely with Camunda partner to add ALL BPMN symbols.</li><li>• WIP migration strategy</li><li>• Stop using javaDelegate</li></ul>
Platform scope	<ul style="list-style-type: none"><li>• 1 platform per Business Domain</li><li>• 1 platform per (Business Capability)</li><li>• 1 platform per Project</li><li>• 1 platform per Application</li></ul>	<ul style="list-style-type: none"><li>• 1 platform per Application</li></ul>
Business Data vs process	<ul style="list-style-type: none"><li>• Sensitive data in Camunda DB</li><li>• Business data in Camunda DB</li></ul>	<ul style="list-style-type: none"><li>• No business data in camunda DB</li></ul>
Data analysis	<ul style="list-style-type: none"><li>• No process analysis (just cockpit)</li></ul>	<ul style="list-style-type: none"><li>• Use Optimize per domain</li><li>• WIP pan-bank BP analysis solution</li></ul>

# Business Process Governance



## Governance Foundation (in progress Q4)

All required development artifacts (e.g. code, documentation, issue tracker , etc.) have to be accessible for all employees of NBC, leveraging inner sourcing.

Item	Challenge	Position
AuthN/AuthZ	<ul style="list-style-type: none"><li>Different solutions (LDAP, AzureAD, OIDC, ...)</li></ul>	<ul style="list-style-type: none"><li>Use NBC IMx &amp; security positioning</li><li>Implement AuthN/AuthZ foundation as innersource artifact</li></ul>
Global Metrics Collection (CEMA)	<ul style="list-style-type: none"><li>No metrics collection</li><li>Decentralized platforms</li><li>Not prioritized by domains owners</li></ul>	<ul style="list-style-type: none"><li>As transitional solution: Adhoc metrics collection</li><li>Implement Metrics Collector foundation as innersource artifact</li></ul>
Optimize / AWS Elasticsearch	<ul style="list-style-type: none"><li>AWS Elasticsearch is based on OpenSearch</li></ul>	<ul style="list-style-type: none"><li>POC using AWS Elastic Elasticsearch service</li></ul>

# Business Process Governance



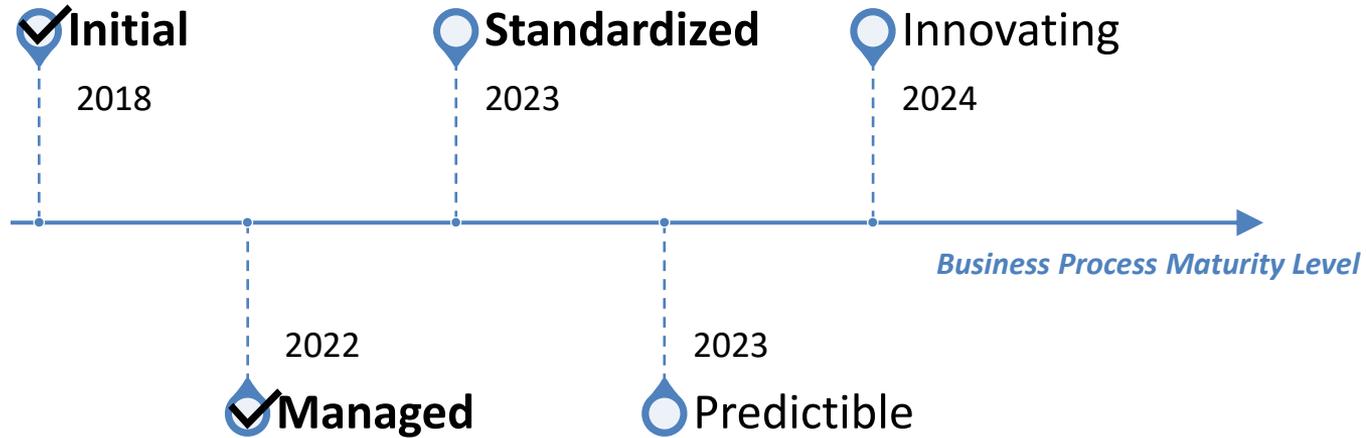
## Gouvernance Success/Issue

Success 	Issue (perception) 
Uniformity/standardization <ul style="list-style-type: none"><li>• Patterns</li><li>• Positioning</li></ul>	Cultural change (why all is good)
Adoption of Reusability <ul style="list-style-type: none"><li>• Foundation (innersourcing)</li></ul>	kills innovation
Enterprise roadmap	Slowdown Time2Market
	Loss of autonomy

# Business Process Governance



## Future



**Thank you !**  
**Q&A**



**Felix Carrier**

[linkedin.com/in/felixcarrier](https://www.linkedin.com/in/felixcarrier)



**Tarik Choufa**

[linkedin.com/in/tarik-choufa-4a1a19](https://www.linkedin.com/in/tarik-choufa-4a1a19)

