

XERO AND BANKING INTEGRATION

AT A GLANCE

CHALLENGES

- Complex integration scenarios across multiple systems and organisations
- Stakeholder alignment on solution design across bank departments

BENEFITS

- Robust solution across organisations due to thorough scenario analysis



"For over 20 years I've helped household name organisations across Australasia and the UK make smarter decisions, faster, and drive change.

Work with me to get clarity and consensus on a pragmatic way forward."

REBECCA SPEIRS

Adapt & Improve Consulting

CLIENT OBJECTIVES

Enable business banking customers for a New Zealand bank to register for Xero from Internet banking, and to initiate payments from Xero. The project was part of a major programme focused on faster transactional banking.

APPROACH DESIGNED

- A business priority-driven framework with an iterative delivery cycle and a blend of Agile methods from Scrum and Kanban.
- Facilitating exploration and agreement of solution designs across bank system owners and with Xero.
- Ensure traceability business requirements to solution design and coordination of systems requirements ownership across the bank.

RESULTS DELIVERED

- Instigated the use of scenario and state change analysis to manage the complexities of cross-organisational data and process flows between the bank and Xero. Commended by Xero for this analysis as it enabled convergence of thinking across organisations and a robust solution
- Stakeholder engagement and alignment through skilled facilitation during solution design:

"It's great to see all the different development teams, along with design and testing team members all collaborating together and all on the same page about the preferred solution approach. A great example of an integrated design walkthrough"

Programme Manager, Transactional Faster