

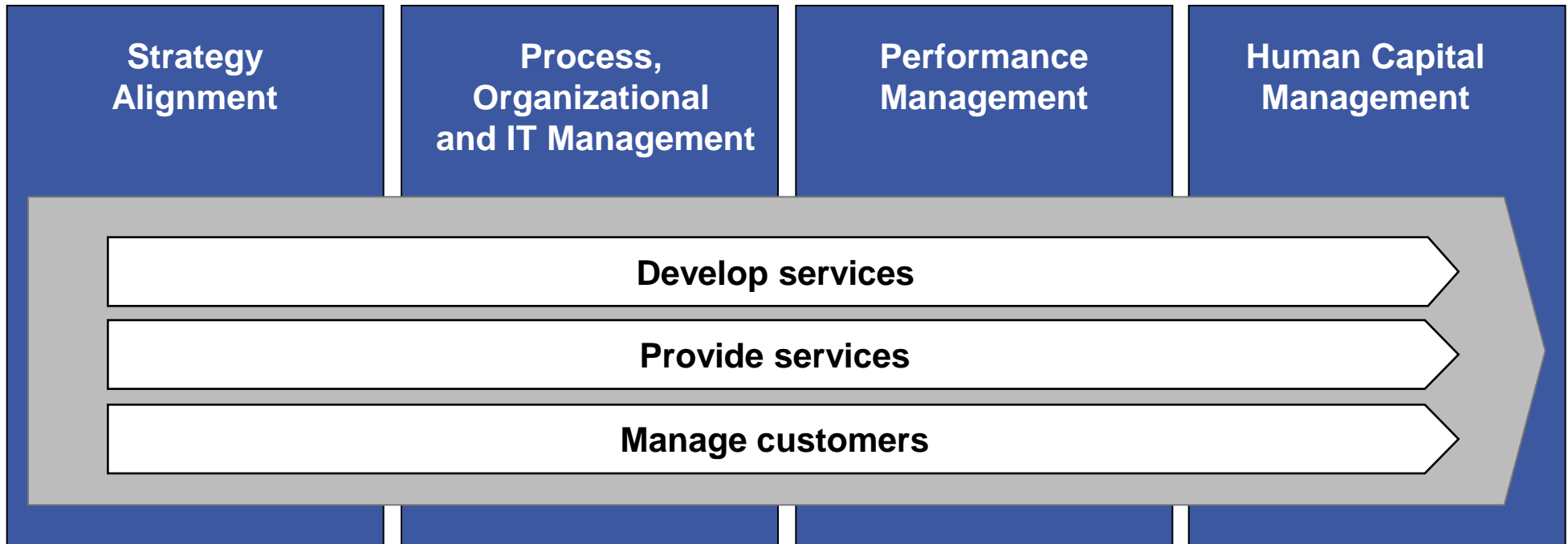
Operational Excellence in Financial Industries

OpEx FI Study Results 2013

Agenda

- **Introduction to the OpEx FI study and the underlying Framework**
- OpEx Trends in the European Financial Industry

Our methodical framework shows the four core categories of Operational Excellence

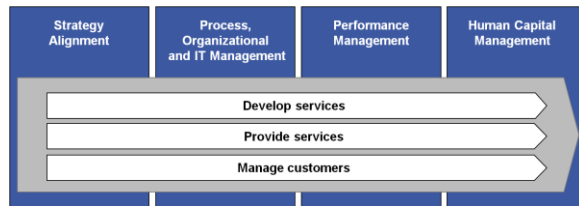


*Operational Excellence is **the dynamic ability to realize an effective and efficient value chain** through integrated development and use of process-related, organizational, technological, and cultural factors. Excellence aligns processes with strategic goals and continuously innovates, implements, monitors and optimizes processes.*

Based on the comparison of as-is and to-be figures, fields of action are being identified to improve Operational Excellence

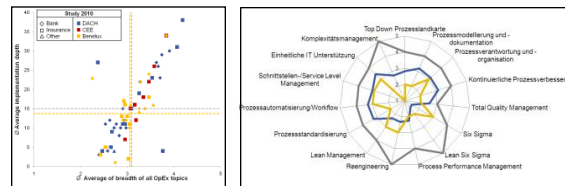
Determination of position, Assessment of maturity level

- Balanced performance survey of the level of implementation and of the scope of single fields of action in the OpEX Framework
- Positioning in the OpEx-Level of maturity portfolio



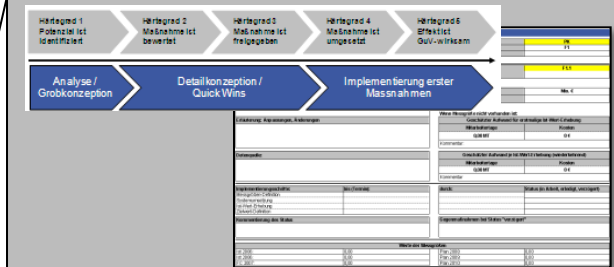
Definition of target scenario and variance analysis

- Survey of ambition level, definition of target scenario
- Identification of variances of market development and own objectives
- Deduction of fields of action



Develop and Implement Actions for Improvement

Adapt Highland Worldwide methods and solutions to goal-oriented development in order to efficiently implement the prescribed measures for improvement

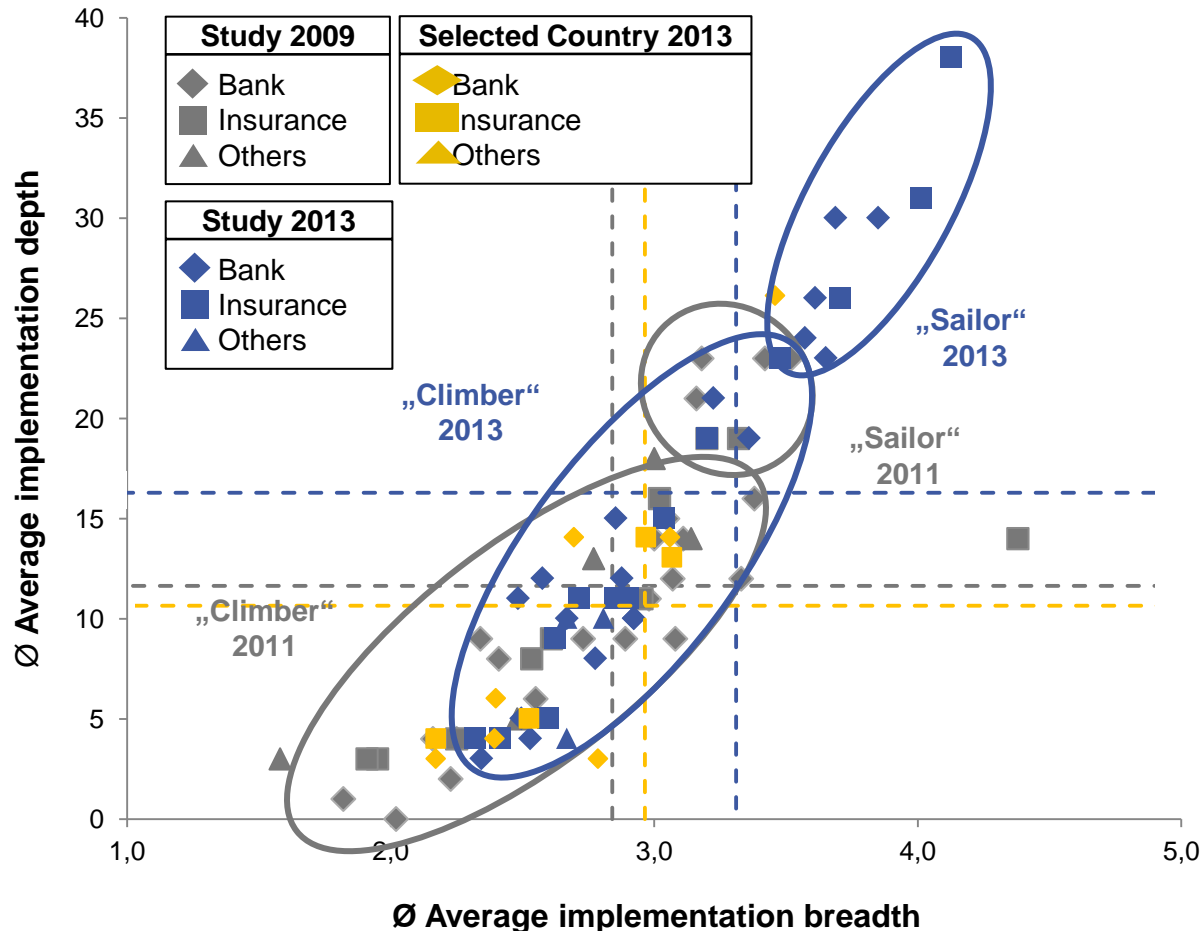


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- **OpEx Trends in the European Financial Industry**

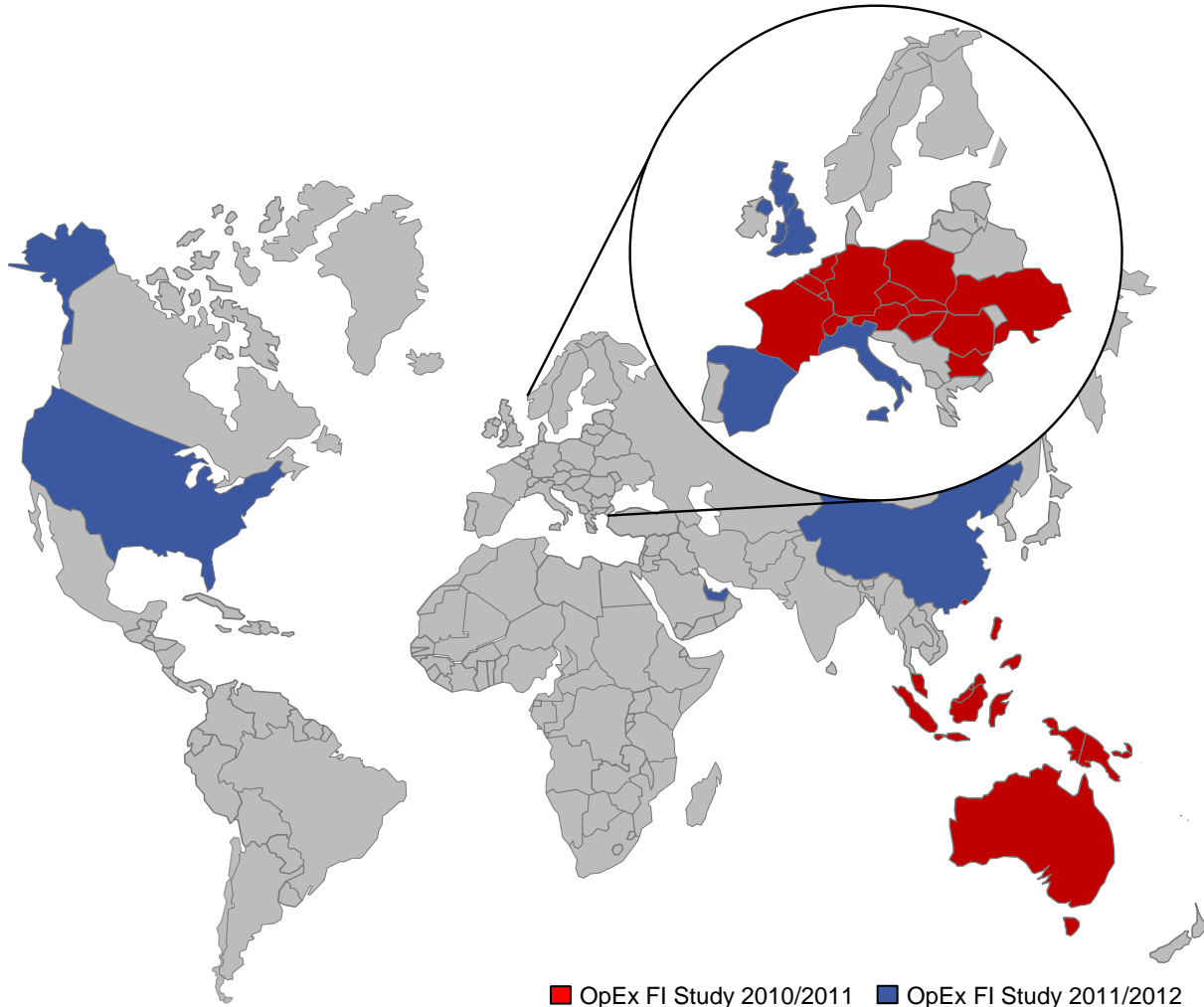
Remarkable performance drift in the OpeX FI Level of maturity portfolio in Europe

Average breadth of implementation and depth of specification in OpEx fields of action and development of all participants



- The „**Climbers**“ have to invest into balance as well as in the specification of the topics to be competitive
- The group of „**Sailors**“ is able to achieve further Operational Excellence fields by controlling systematically
- Most of the selected participants are categorized as „**Climbers**“ in the OpEx-Level of maturity portfolio
- **Large Potential** for improvement in Operational Excellence is appraised by the selected "climbers"

Outlook OpEx FI Study 2013: Comparison of the most important financial regions worldwide



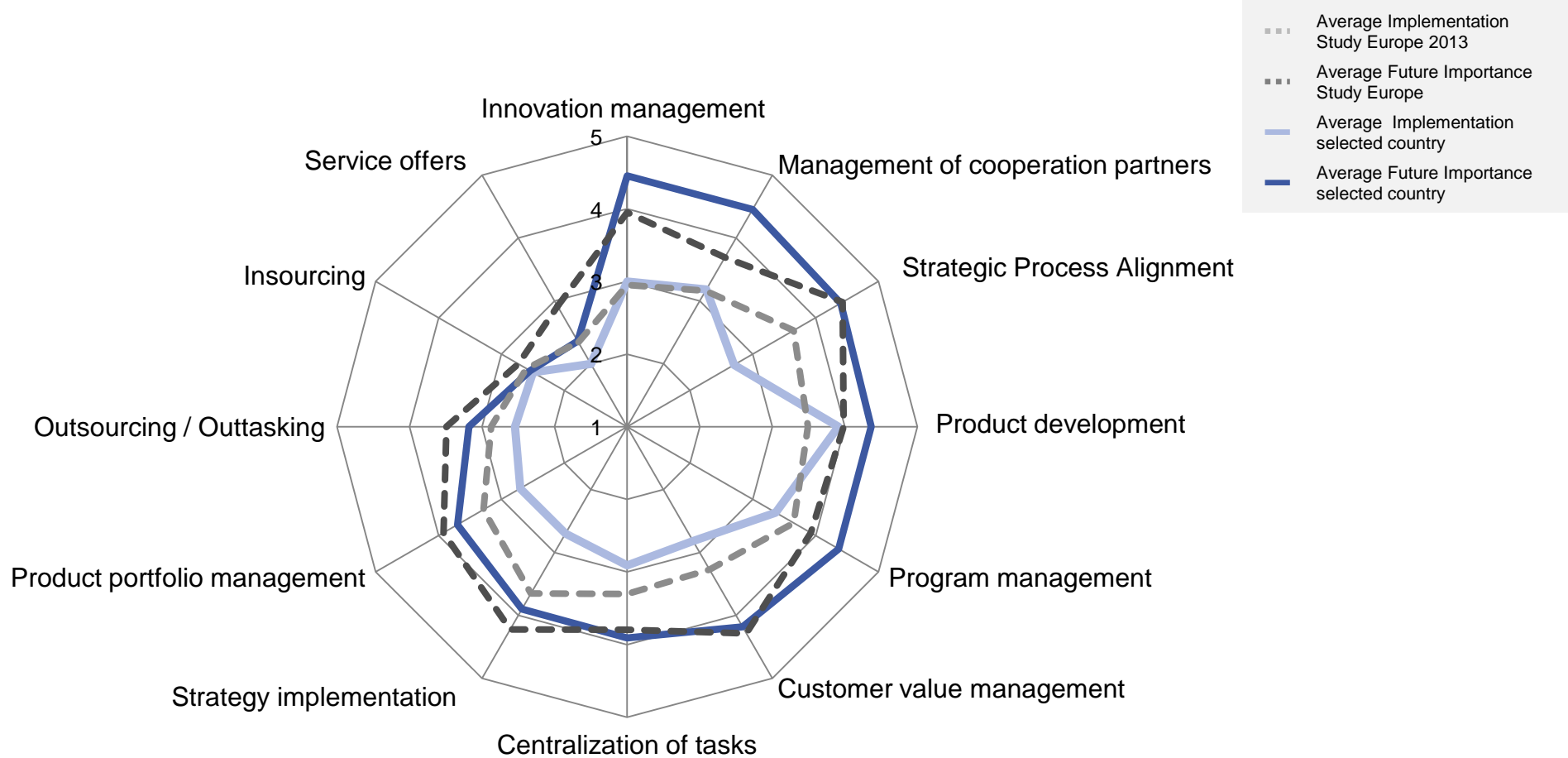
Study 2013

- Germany
- Austria
- Switzerland
- CEE
- Benelux
- France
- Spain
- **Italy**

■ OpEx FI Study 2010/2011 ■ OpEx FI Study 2011/2012

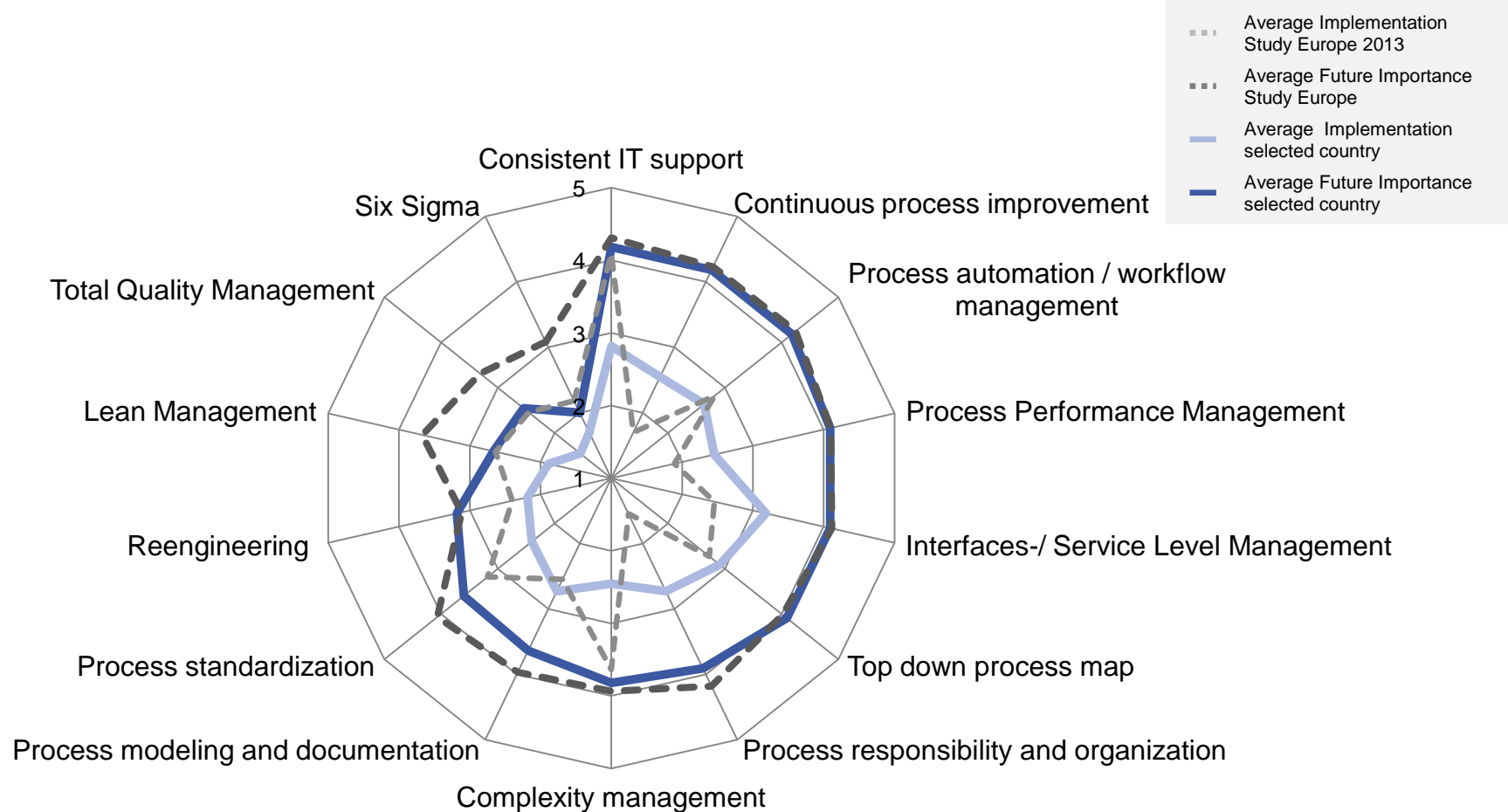
Core category Strategy Alignment

Current level of implementation and future importance of the topics regarding Strategy Alignment



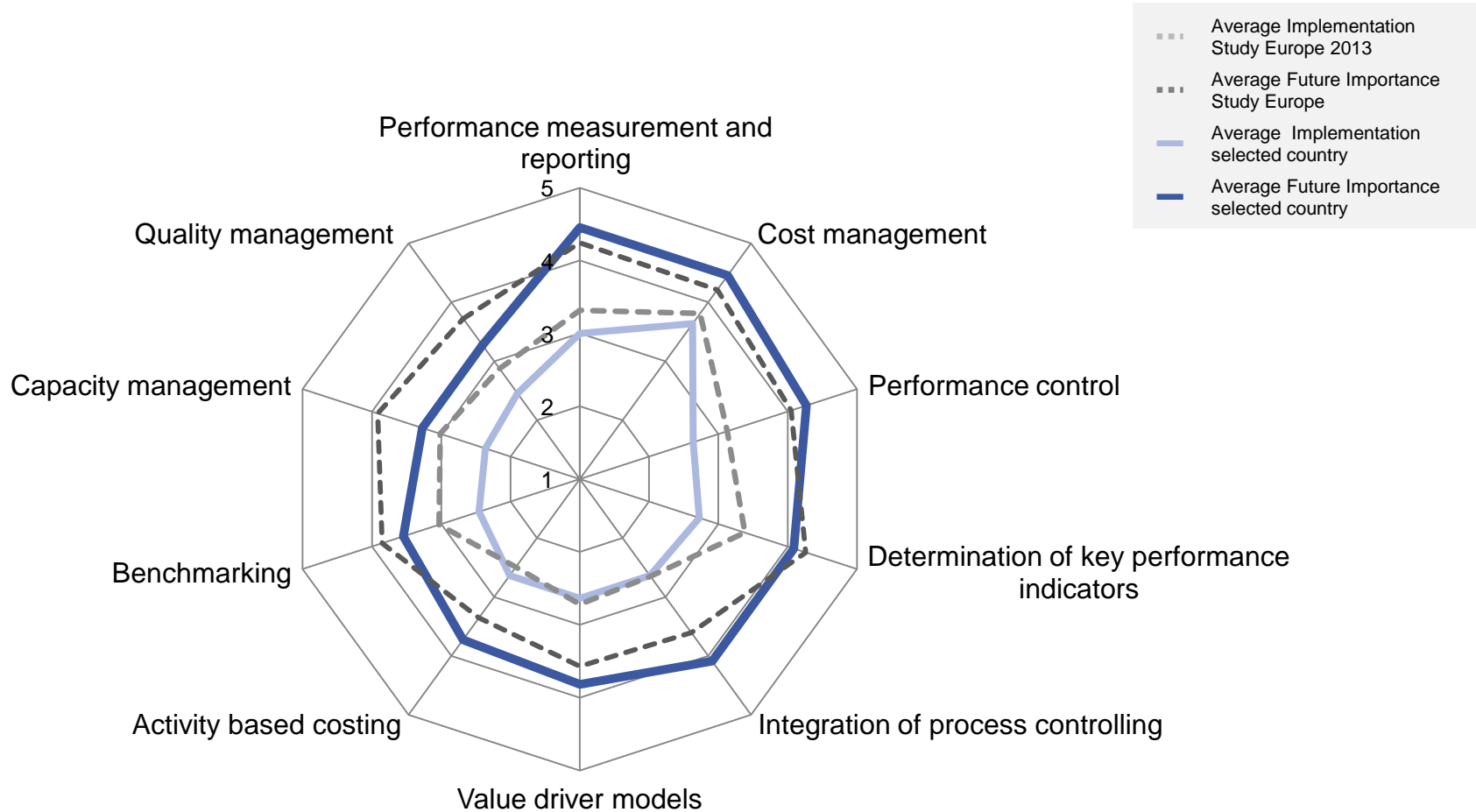
Core category Process, Organization and IT Management

Current level of implementation and future importance of the topics in the process, organization and IT management



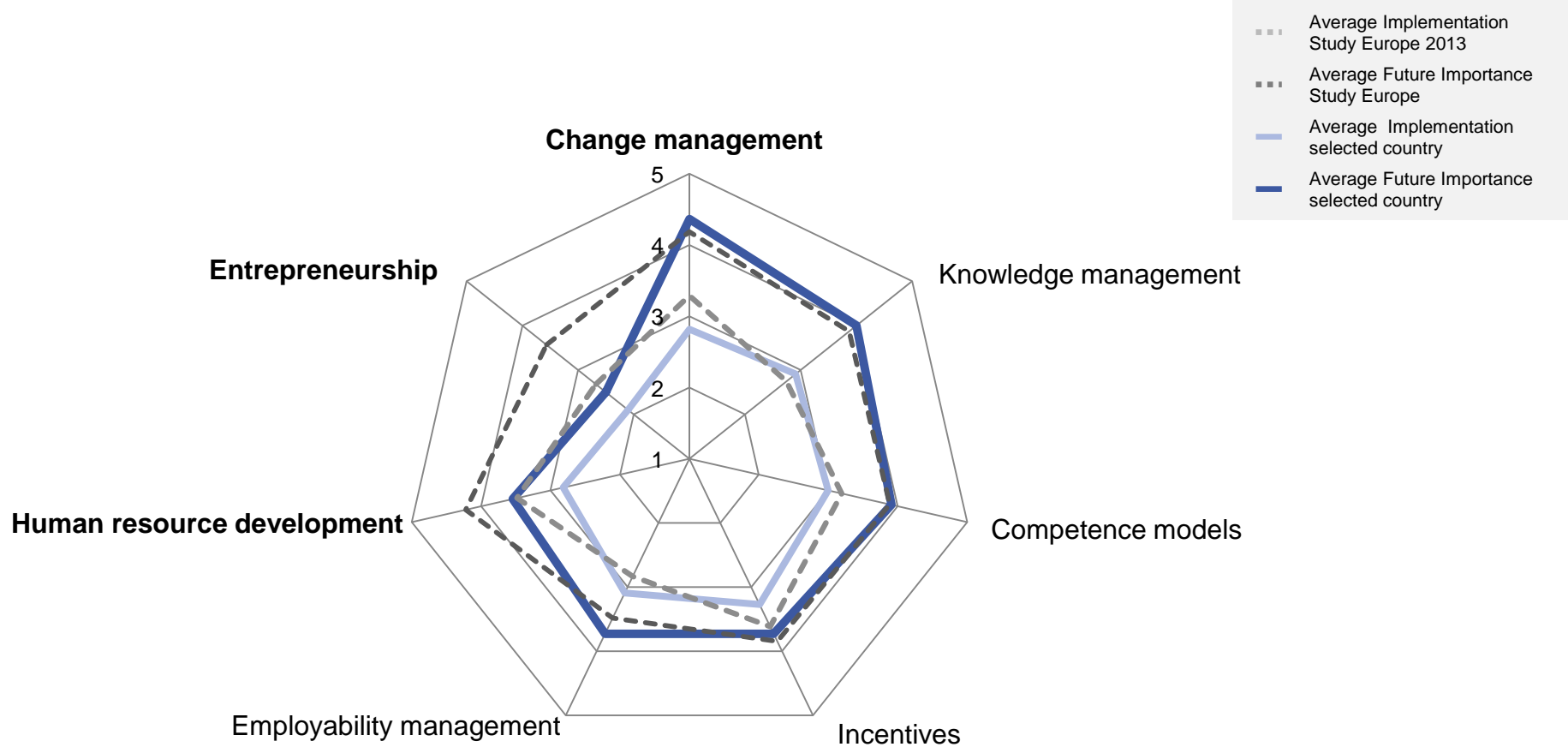
Core category Performance Management

Current level of implementation and future importance regarding performance management



Core category Human Capital Management

Current level of implementation and future importance of topics in the Human Capital Management



European results and trends

Operational Excellence in Europe

The future importance of the OpEx topics is recognized, but the implementation is recurrent and behind the estimated performance

Customer value management and strategic process alignment are considered as the most important future topics

The continuous process improvement and process performance management are identified as fundamental fields of action

Performance control based on determined key performance indicators has to be improved on a high level status

Human Capital Management is of high importance with incentives as the most applied method

Thank you for your attention!