Case Study

Extended Enterprise Architecture

Sam Ishak P.Eng
Director, Strategy & Enterprise Architecture
First Canadian Title
Agenda

- Background
- Introduction
- Business Objective
- Solution Approach
- Q&A
Sam Ishak, Director, Strategy and Enterprise Architecture of First Canadian Title. Previously, he was the Enterprise Architect of Insurance Bureau of Canada (IBC)

Certified Master IT Architect by the Open Group, TOGAF 8 certified.

Mr. Ishak is the Treasurer of the Toronto Chapter of the Association of Open Group Enterprise Architects (AOGEA)

Mr. Ishak has a B.Sc. degree in computer science and he is Licensed Professional Engineer of Ontario (PEng.)
First Canadian Title is Canada’s leading provider of title insurance, and other related products and services for residential and commercial real estate transactions.

Founded in 1991 and based in Oakville, Ontario, Canada

First Canadian Title employs approximately 1000 people

Its customers include more than 15,000 lawyers and notaries nationwide, every major Canadian chartered bank, credit unions, other lending institutions, real estate agents, mortgage brokers and builders.
Case Study:

Extended Enterprise Architecture

“How can you deliver business services that go beyond the boundary of your Enterprise?”
Business Objective

- This initiative started with the following statement:

  "How we can partner with three companies to provide Integrated Lending Solution to maximize our offerings to our lender customers?"
AN INTEGRATED LENDING SOLUTION

Business Objective
**Approach**

- **Analyze**
  - High Level Current Business Process Modeling (AS IS)
  - Identify Different Order Scenarios
  - Model the Target Integrated Business Process

- **Decide**
  - Identify/Resolve Gaps/Overlaps
    - For each Scenarios: People -> Who will do what?
    - Technology -> Which Party’s Technology to use?

- **Automate**
  - Develop High Level Integration Architecture
    - Develop a Roadmap: Projects Sequence High-level Timeframe
    - Projects will include: PoC and Prototypes Integration project Development projects
Approach

Analyze

- High Level Current Business Process Modeling (AS IS)
- Identify Different Order Scenarios
- Model the Target Integrated Business Process

Decide

- Identify/Resolve Gaps/Overlaps
  - For each Scenarios: People -> Who will do what?
  - Technology -> Which Party's Technology to use?

Automate

- Develop High Level Integration Architecture
  - Develop a Roadmap: Projects Sequence High-level Timeframe
  - Projects will include: PoC and Prototypes Integration project Development projects
Approach - Analyze

✓ High Level Current Business Process Modeling (AS IS)
Approach

- High Level Current Business Process Modeling (AS IS)
- Identify Different Order Scenarios
- Model the Target Integrated Business Process

- Identify/Resolve Gaps/Overlaps
  - For each Scenarios: People -> Who will do what?
  - Technology -> Which Party’s Technology to use?

- Develop High Level Integration Architecture
  - Develop a Roadmap: Projects Sequence High-level Timeframe
  - Projects will include: PoC and Prototypes Integration project Development projects
Approach - Analyze

✓ Identify Different Order Scenarios

<table>
<thead>
<tr>
<th>Scenarios</th>
<th>Requested Services</th>
<th>Lender</th>
<th>Dorado</th>
<th>FCT</th>
<th>3rd Party</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Origination, Valuation, Closing</td>
<td><img src="image1" alt="Diagram" /></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Valuation, Closing</td>
<td><img src="image2" alt="Diagram" /></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Origination</td>
<td><img src="image3" alt="Diagram" /></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Origination, Valuation</td>
<td><img src="image4" alt="Diagram" /></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Origination, Closing</td>
<td><img src="image5" alt="Diagram" /></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Approach - Analyze

✓ Identify Different Order Scenarios (Continue …)

<table>
<thead>
<tr>
<th>Scenarios</th>
<th>Requested Services</th>
<th>Lender</th>
<th>Dorado</th>
<th>FCT</th>
<th>3rd Party</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2'</strong></td>
<td>Origination</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Valuation</td>
<td>+</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Closing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Or</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>5'</strong></td>
<td>Origination</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Closing</td>
<td>+</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Optional (Case by case)
**Approach - Analyze**

1. **Analyze**
   - High Level Current Business Process Modeling (AS IS)
   - Identify Different Order Scenarios
   - Model the Target Integrated Business Process

2. **Decide**
   - Identify/Resolve Gaps/Overlaps
     - For each Scenarios: People -> Who will do what?
     - Technology -> Which Party’s Technology to use?

3. **Automate**
   - Develop High Level Integration Architecture
     - Develop a Roadmap: Projects Sequence High-level Timeframe
     - Projects will include: PoC and Prototypes Integration project Development projects
✓ Model Target Integrated Business Process Utilizing Agreed Upon Guiding Principles:

- Integrated Lending Solution will provide Menu of Service
- Seamless Business Process for our Customer
  - Capture Data Once
  - Single Point of Contact
- Leverage the Core Competencies of each Partner
- Minimized Redundancy & Integration
- Minimized Time to Market
Approach - Analyze

- High Level Current Business Process Modeling (AS IS)
- Identify Different Order Scenarios
- Model the Target Integrated Business Process

**Analyze**

- Identify/Resolve Gaps/Overlaps
  - For each Scenarios:
    - People -> Who will do what?
  - Technology -> Which Party’s Technology to use?

**Decide**

- Develop High Level Integration Architecture
  - Develop a Roadmap: Projects Sequence High-level Timeframe
  - Projects will include: PoC and Prototypes Integration project Development projects

**Automate**
Approach - Decide

✓ Resolve Gaps/Overlaps

<table>
<thead>
<tr>
<th>Loan Business Process</th>
<th>Optional?</th>
<th>People</th>
<th>Technology</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Lender</td>
<td>DRN</td>
</tr>
<tr>
<td>Origination</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Loan Initiation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Request Credit Report</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Search Qualifying Products</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Order Mortgage Insurance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Loan Processing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Order Valuation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apply Underwriting Rules</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prepare the Commitment Letter</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collect Supporting Docs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Order Title Insurance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Process Title Insurance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Order Title Search</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Feb 3rd 2009                      21st Enterprise Architecture Practitioners Conference – San Diego
Approach - Automate

Analyze

- High Level Current Business Process Modeling (AS IS)
- Identify Different Order Scenarios
- Model the Target Integrated Business Process

Decide

- Identify/Resolve Gaps/Overlaps
  - For each Scenarios: People -> Who will do what?
  - Technology -> Which Party’s Technology to use?

Automate

- Develop High Level Integration Architecture
  - Develop a Roadmap: Projects Sequence High-level Timeframe
  - Projects will include: PoC and Prototypes Integration project Development projects
ILS Sample Integration Architecture Artifact

Approach - Automate
Approach - Automate

Analyze

- High Level Current Business Process Modeling (AS IS)
- Identify Different Order Scenarios
- Model the Target Integrated Business Process

Decide

- Identify/Resolve Gaps/Overlaps
  - For each Scenarios: People -> Who will do what?
  - Technology -> Which Party’s Technology to use?

Automate

- Develop High Level Integration Architecture
  - Develop a Roadmap: Projects Sequence High-level Timeframe
  - Projects will include: PoC and Prototypes Integration project Development projects
Approach - Automate

✓ Sample Roadmap

High Leve Roadmap Timeline

<table>
<thead>
<tr>
<th>Month 1</th>
<th>Month 2</th>
<th>Month 3</th>
<th>Month 4</th>
<th>Month 5</th>
<th>Month 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>W1</td>
<td>W2</td>
<td>W3</td>
<td>W4</td>
<td>W1</td>
<td>W2</td>
</tr>
<tr>
<td>W1</td>
<td>W2</td>
<td>W3</td>
<td>W4</td>
<td>W1</td>
<td>W2</td>
</tr>
<tr>
<td>W1</td>
<td>W2</td>
<td>W3</td>
<td>W4</td>
<td>W1</td>
<td>W2</td>
</tr>
<tr>
<td>W1</td>
<td>W2</td>
<td>W3</td>
<td>W4</td>
<td>W1</td>
<td>W2</td>
</tr>
</tbody>
</table>

- Business Process
- Phase 1 (FCT – Dorado integration)
- Phase 2 (External Integration)
- Phase 3 (Servicing)
- Phase 4 (Recovery)

Deliver Business Process
Deliver FCT-Dorado Integration
Deliver External Integration
Approach - Automate

Analyze

- High Level Current Business Process Modeling (AS IS)
- Identify Different Order Scenarios
- Model the Target Integrated Business Process

Decide

- Identify/Resolve Gaps/Overlaps
  - For each Scenarios: People -> Who will do what?
  - Technology -> Which Party’s Technology to use?

Automate

- Develop High Level Integration Architecture
  - Develop a Roadmap: Projects Sequence High-level Timeframe
  - Projects will include: PoC and Prototypes Integration project Development projects
Approach - Automate

✓ Sample Storyboard - POC

- Process Origination
- Request Valuation
- Request Closing

FCT Portal
Dorado UI
Delta360 UI
DRN UI
Summary

- How can you deliver a business services that go beyond the boundary of your Enterprise?
  - leverage the three steps approach Analyze, Decide, then Automate

- Questions & Answers

Thanks for Listening

For more information, feel free to contact Sam Ishak at:

SAISHAK@FIRSTCDN.COM