

# Credit Suisse Investment in Change Management Pays Off

## A Credit Suisse Success Story



Stephan de Diego  
Midrange Dynamics Managing Partner  
Credit Suisse



## At Credit Suisse, the investment in Midrange Dynamics pays off every day

Credit Suisse is a leading financial services company with approximately 46,200 employees, including about 21,000 in Switzerland, and 530 locations in more than 50 countries worldwide. This global bank relies on Midrange Dynamics solutions to manage its entire software change process—from project management, development and testing, through distribution and installation on production systems.

In this Q&A interview, Rainer Fürst, Head of IT Leasing & ESOS (Employee Share Ownership Services) at Credit Suisse discusses their mutually beneficial relationship with Midrange Dynamics Managing Partners Michael Morgan and Stephan de Diego.

### **Stephan de Diego (SD): How would you describe your long-time association with Midrange Dynamics?**

**Rainer Fürst (RF):** Our collaboration dates from 1998. Initially we focused on the “Y2K” problem. The MD products enabled us to analyze our systems quickly and efficiently, affirming our selection of Midrange Dynamics as our solutions provider.

Credit Suisse is also a long-time “beta” customer for new releases. We appreciate this close relationship since we can send ideas and enhancement requests directly to the manufacturer. Generally these features are quickly incorporated in subsequent releases to benefit all Midrange Dynamics customers.

**Michael Morgan (MM):** We also appreciate Credit Suisse’s role as a pilot customer. We are able to install product enhancements and new releases in a dynamic IT environment with multiple developers, diverse applications, many test and production environments, and numerous systems.

### **SD: What are the top benefits of this collaboration and your use of the Midrange Dynamics products?**

**RF:** First and foremost, reliability! Since 1998, we have distributed countless application changes through all levels of testing on production systems, and we have never had a ‘weird’ installation. MDChange brings indispensable stability to our software management processes, which gives all parties involved a lot of

confidence. We know that ‘the bank will be ‘up and running’ on Monday morning!

We have implemented intensive test scenarios and procedures at Credit Suisse. The comfortable rollback features in MDChange keep our test environments clean. For example, if a decision is made shortly before promotion that only some of the new features will go into production, we can rollback objects at all stages automatically, disconnect specific features, and migrate objects back through all test levels.

**MM:** MDChange provides functions to rollback individual objects or entire installations with the click of a button. The challenge is managing the many affected programs. MDChange ensures you avoid conflicts between versions, identify interdependencies among these objects, and migrate changes in an orderly fashion through installation in all environments.

**RF:** Even for installations via an emergency path we fully rely on the monitoring and control functions in MDChange.

**SD:** Credit Suisse has a lot of developers, applications, test and production environments, and systems. How do you keep track of the ongoing work?

**RF:** The close link between MDChange and MDWorkflow enables our staff performing parallel development and testing to work efficiently, control minor changes for larger installation packages, and subdivide large packets into several smaller installation packages. With MDWorkflow developers, project managers, test managers, user representatives, and release managers engage in a pre-defined process. All parties involved

**“With deployment there are no unpleasant surprises.”**

—Rainer Fürst  
Head of IT Leasing & ESOS  
Credit Suisse

always know the status of work on new releases. In addition, the subdivision of requests into tasks brings a lot to larger and more complex projects.

**MM:** For many participants in a project, it is also important that you can understand the individual steps, because every change is relevant in the system audit.

**RF:** Right! Audit requirements have increased massively in the past 10 years, starting in 2003 with the Sarbanes-Oxley Act (SOX Section 404). An audit of Credit Suisse had MDChange classified as “SOX compliant.” Direct contact with Midrange Dynamics was very helpful to discuss changes and suggestions to optimize Credit Suisse’s internal SOX processes. The close link between MDChange, MDOpen, MDXREF, MDSEC, and MDWorkflow provides Credit Suisse with a complete audit trail at the deepest level: who, what, when, and why. Who made a change and released it? Why? When did it happen? What type of system was it installed on? We can trace this down to the code level for the last 99 changes. We create audit-related checks such as object installation reports, overviews of permissions, and configurable reports on request.

## “The investment in the MD products pays off every day”

—Rainer Fürst  
Head of IT Leasing & ESOS  
Credit Suisse

### **SD: Considering role allocation for users, how does Credit Suisse handle reports for the audit department?**

**RF:** We define the desired evaluations once and save those definitions. Reports are created automatically without manual intervention, and PDF, Excel, or other formats are sent by email.

**RF:** I would like to mention another important department: Production Support. Production Support employees use MDXREF every day. It is their most important resource to help them respond to all sorts of queries. For example, they can reply to requests for transaction journaling within a very short time using a comfortable-to-

use analysis screen. MDXREF is an indispensable tool for our IT support organization!

### **SD: To conclude our conversation, how does Midrange Dynamics assist with the overall challenges that software management presents for Credit Suisse?**

**RF:** Orderly and structured management of changes amid continual requests from the banking operation is the biggest challenge for our IT organization. IT must support business goals, and the organization must change continuously to handle evolving requirements. Planned changes obviously benefit the bank and the users. Unexpected and unplanned demands can have a negative impact on IT systems and processes—and thus on banking operations—if not managed very carefully.

IT organizations are responsible for a complex structure of interconnected systems. Each component must work together properly with all other components of the overall system (applications, databases, middleware, directory services, operating systems, networks, etc.).

I believe that the management and fast, efficient, and non-intrusive implementation of these many changes in a large and complex system—and the rising cost pressure—are the biggest challenges for today's IT organizations. Midrange Dynamics products, especially MDChange and MDWorkflow, have helped us meet these challenges for many years. Without these tools, we could never get as many changes, using clean, transparent, and cost-effective processes, into production.

**SD: Mr. Fürst, thanks for the interesting conversation. |**



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