

Case study:  
Nationwide Building Society

# Nationwide Building Society: Integrating Portman

## expert

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**Campion Willcocks Associates played key roles in the successful integration of the Nationwide and Portman, helping deliver a wide-ranging programme £10m under budget and months ahead of schedule.**

With the Nationwide already the UK’s biggest building society and Portman the third largest, their merger created the country’s second largest mortgage lender and savings provider, with 13 million members and £160 billion in assets. As you’d expect, a huge amount of work was required to integrate the businesses effectively and achieve significant cost efficiencies.

### **The challenges of change**

“I ran the integration,” says Phil McCabe, Portman’s former CIO and Programme Director (now Programme Director of Voyager – a programme to modernise Nationwide’s technology with an integrated, next generation technology platform). “This broke down into 20 major projects to be completed in two years, achieving total integration and the resulting cost efficiencies by then. However, there was a serious staff shortage in the Change and IT Divisions so we went to the market. Engaging trusted contractors would ensure work was done properly without diverting too many of our own people.” The business short-listed five suppliers, with Campion Willcocks providing high-level people. “We found very few expert

providers - Campion Willcocks is clearly one of the top,” says McCabe. “They put a small number of highly skilled candidates forward, so immediately they’ve reduced your work in sifting through CVs. I’ve never failed to choose a candidate from a list put forward by them. They’re very good at matching the requirement with the right people; plus, they understood our business and how we work.”

### **Complex requirements**

Associate Hermione Dixon was Programme Manager for Payments Migration, managing 40 people and a budget of £3 million. This work, which involved complex deliverables and inter-dependencies, covered a solution for investment payments, implementing outbound payments functionality for Nationwide, and migrating mortgage and investment payments for ex-Portman accounts as well as inbound and outbound bank transfers, and statement and cashbook reconciliation feeds.

“We wanted someone to take stock of a struggling project and move it forward with minimal input from us,” says McCabe. “Hermione had exactly the right experience and attitude. She fitted in perfectly and hit the ground running; she saw what was wrong and created a plan to sort it out. Four weeks later, the programme sponsor called to say she had transformed the situation. Dixon delivered on time and to budget. She cut through some of

## SUCCESS

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the more old-fashioned ways of working. Her approach was very refreshing.”

Another key project was supporting historic records in the data migration from Portman legacy systems, which had major implications for how the business interacted with large numbers of customers. For example, if someone visited a branch with an old Portman passbook, the business had to be able to update it, so all data required had to be available. As a result, this project involved five million savings records going back 15 years, 300,000 mortgage records and 200,000 insurance policies, with data in different formats and needing alignment with Nationwide’s numbering system.

“This was solid, heavy lifting work,” says McCabe. “If it didn’t finish as planned we couldn’t decommission the Portman systems, which was imperative in driving the cost efficiencies. We had to be able to identify every single account.” Associate Chris Andrews joined as Senior Project Manager, heading a team of 20 and a £1.6m budget. “Chris also brought a fresh pair of eyes,” McCabe says. “He said ‘we can do this and in the time, but what’s the best way?’ He engaged very professionally with suppliers to help offload project risk, and we had a way to transfer data without using internal resources. Chris delivered everything asked of him and on time. He also had to catch countless things thrown in his direction, and dealt with all those unexpected changes and additions admirably.”

In addition, Associate Steve Ball was Implementation Manager for the Mortgage Migration. “We’d introduced the concept of trial

runs early and wanted someone to own overall implementation from end of testing onwards,” says McCabe. “Steve grasped the concept fast and we had a great start-up as a result.” Implementation was a huge success, with 85,000 accounts migrated safely from three systems.

### Successful outcomes

The integration programme was completed five months ahead of schedule and £10 million under budget. 100% of the cost savings of £90 million, anticipated over three years, were achieved. “It was very important to get excellent people in fast so we could move things forward, and Campion Willcocks provided a significant number of the people we needed to achieve that momentum,” says McCabe. “We delivered ahead of schedule and under-budget overall. You might think getting people in like this is costing you too much initially but, actually, the work ends up having a shorter duration and you achieve cost-efficiencies earlier. So it ends up saving you money.”

### About Campion Willcocks

Campion Willcocks has been providing contract and interim professionals to more than 3,000 clients in the private and public sectors for over 40 years. Campion Willcocks' continued success reflects an in-depth understanding of the market in which its clients operate and the ability to match the best candidates with the right roles.

**Campion Willcocks & Associates Ltd**  
Oakfield House, 59 Hill Avenue,  
Amersham, Bucks HP6 5ED  
Telephone 01494 725885 Fax 01494 728039  
info@campionwillcocks.co.uk www.campionwillcocks.co.uk