

## CASE STUDY

## Charles Schwab

San Francisco, CA

Expershare was contracted by Charles Schwab to provide mentorship and hands-on experiential training in support of a firm-wide process implementation. The project was based on a corporate decision to adopt the Rational Unified Process, and the team included experienced process engineers from Rational/IBM, Expershare and other third parties. Expershare's specific role was to embed senior consultants with development teams at Schwab, to act as coaches and advisors on effective use of the RUP for risk management. Development teams were of varying sizes, working on a variety of different projects so each team required individualized assessment and treatment of RUP artifacts to realize value in the process, and to achieve an appropriate level of formalism commensurate to the level of risk.

Project:	SDLC Process Implementation
Year:	2000-2001
Professional Services:	<ul style="list-style-type: none"><li>• SDLC Process Implementation</li><li>• Infrastructure, Training, Documentation</li><li>• Current and Future state process modeling, gap analysis</li><li>• Leading multi-vendor and cross departmental teams</li></ul>
Key technologies:	IBM/Rational RUP, RequisitePro
Key Business Problem:	Lacking a common set of requirements and design artifacts prevented teams from effectively sharing resources, and identifying common, reusable components.
Solutions/Deliverables:	Schwab had made a commitment to standardizing on Rational tools and methods as a key step toward bringing teams together. Expershare contributed mentoring and coaching on effective application of the recommended tools in actual project context, thereby bootstrapping the teams, accelerating acceptance of the process and returning value on the investment.

*"... practical expertise shared with the teams was invaluable in demonstrating real return value in the process... "*

-Program Manager