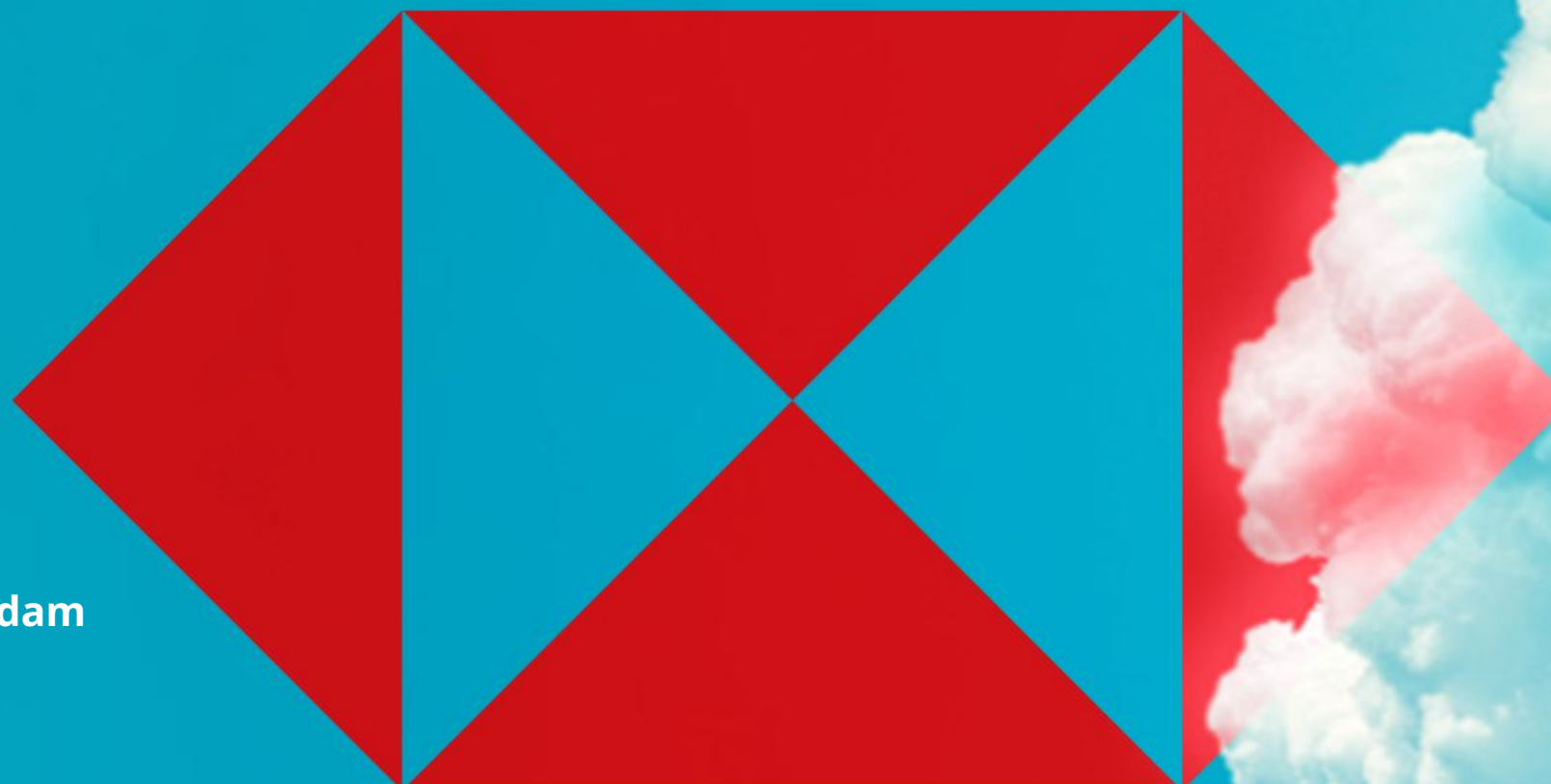


Redefining the customer journey at scale



CamundaCon Amsterdam

Dan Avidan

5/14/2025



Introductions



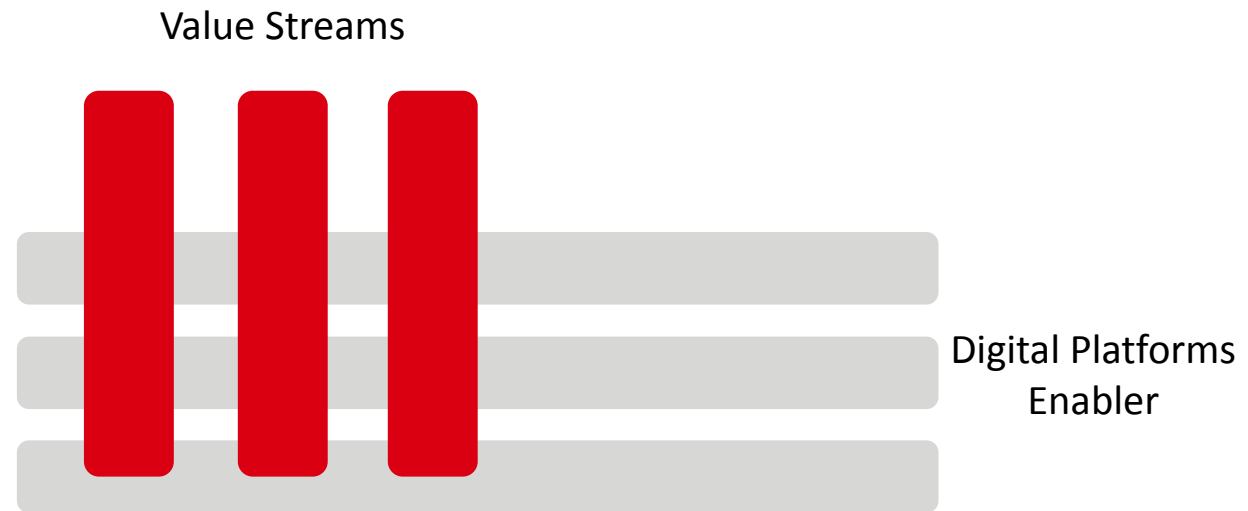
Dan Avidan

Lead Platform Architect

HSBC IWPB – International Wealth and Private Banking

We build tools, that make tools...

We are digital enablers...



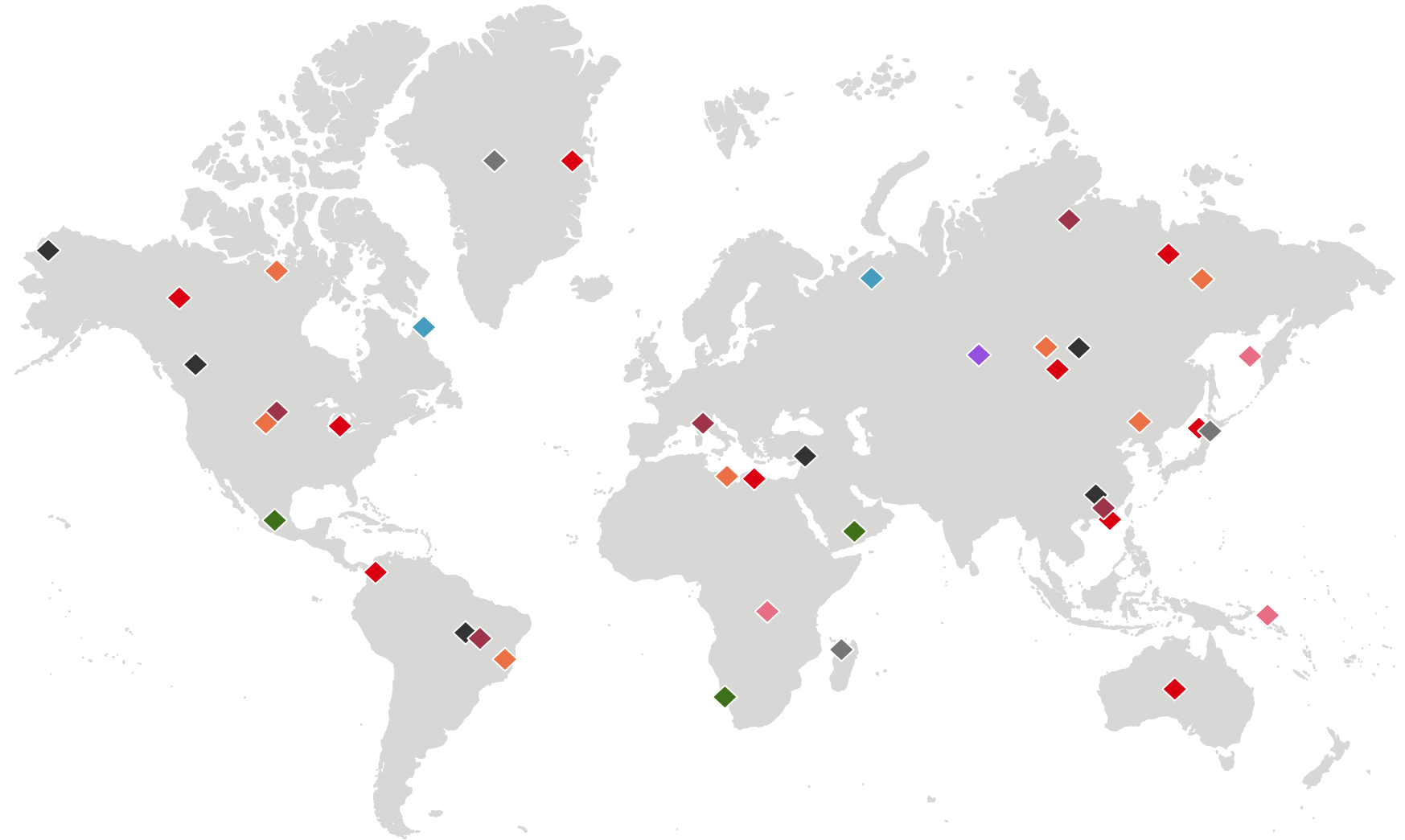
About HSBC

Overview

Founded: **1865**
Assets: **\$3+ trillion**
Customers: **~41 million**
Markets: **58**
Value Streams: **Multiple**

Challenges / Opportunities

Internal complexity
Legacy systems
Efficiency/compliance
Digital-first service



Local
Solutions

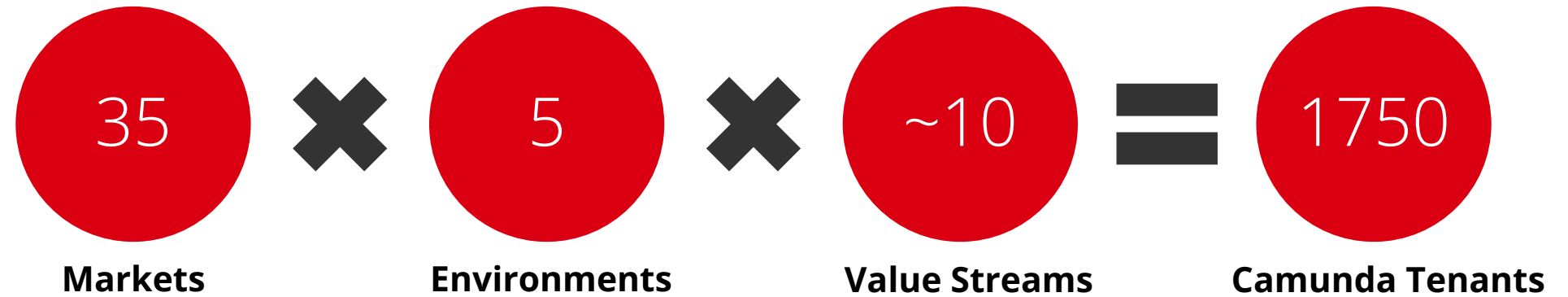
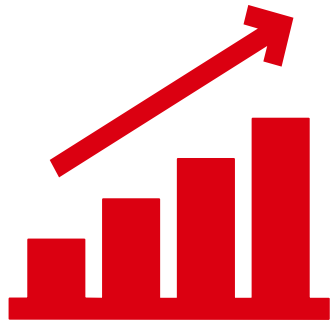


Global Solutions
Deployed Regionally

Expectations -

The end goal

- ♦ 35 Markets x Multiple value streams = Huge impact

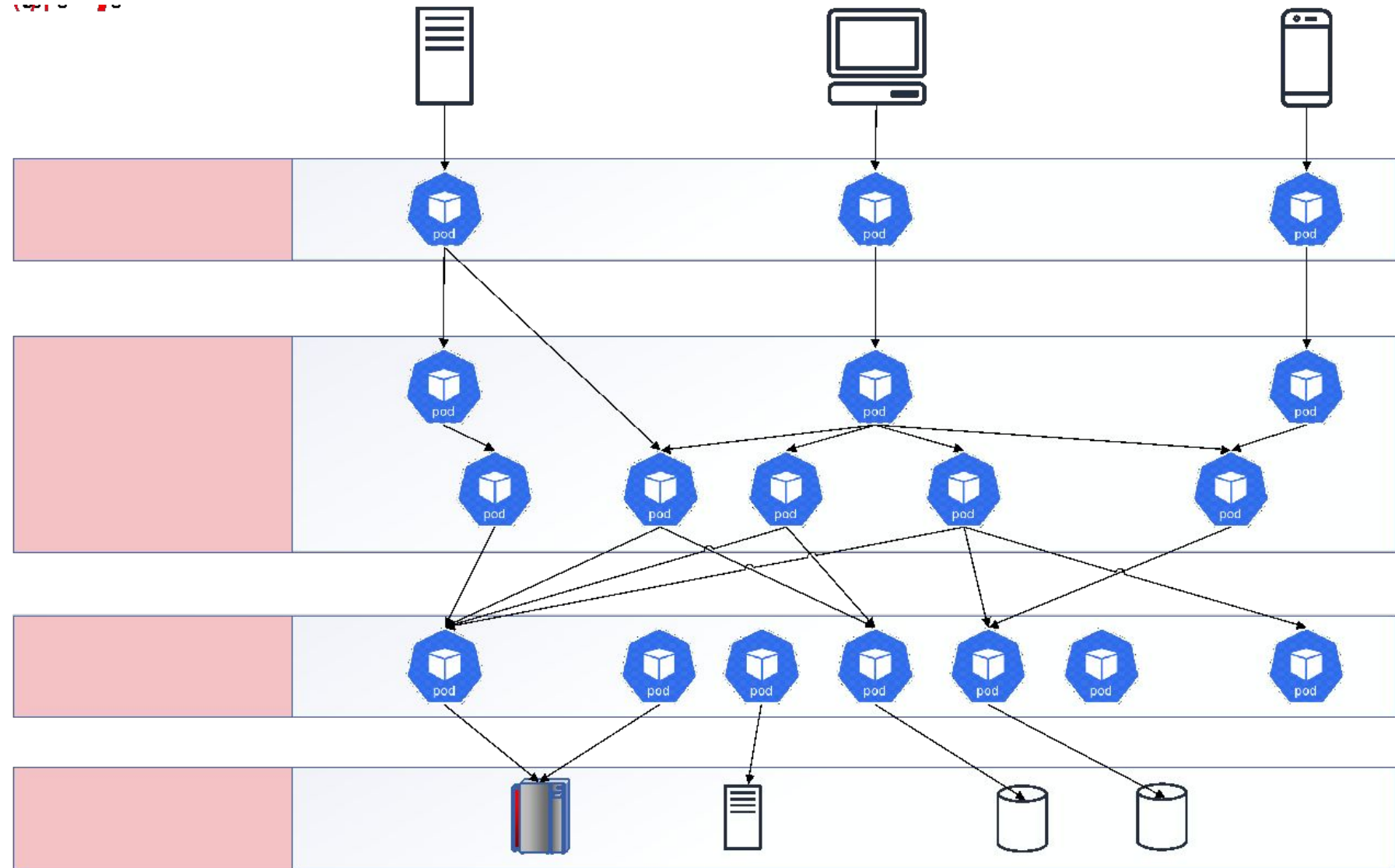


> 200 OpenSearch Domains
> 400 Databases

Architectural challenges

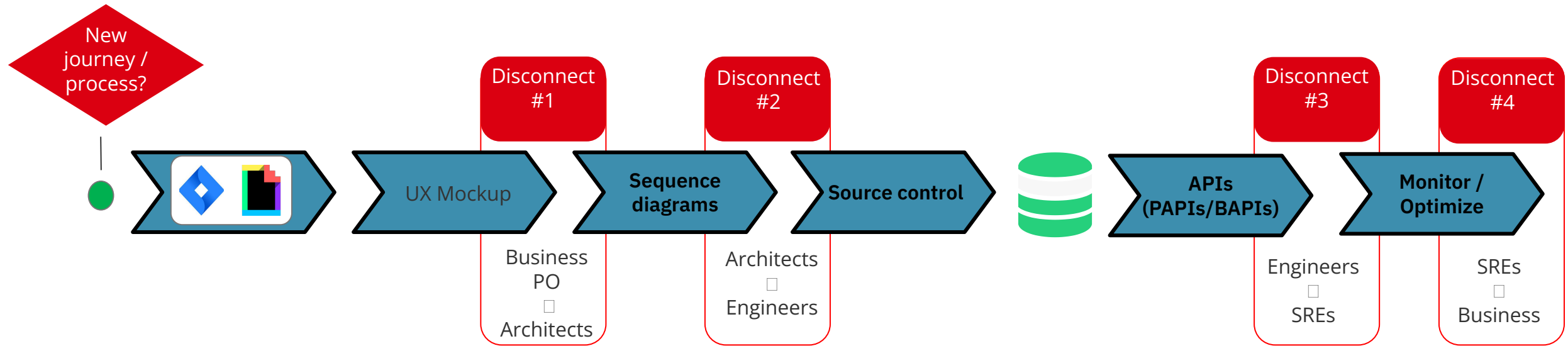
Before - Legacy structure

- ◆ High complexity
- ◆ Multiple technologies
- ◆ Multiple value streams
- ◆ Thousands of micro services / APIs
- ◆ Multiple endpoints
- ◆ Regulatory constraints
- ◆ Risk and Compliance
- ◆ Cyber
- ◆ Governance
- ◆ On-prem + Cloud
- ◆ Operational stability and resilience



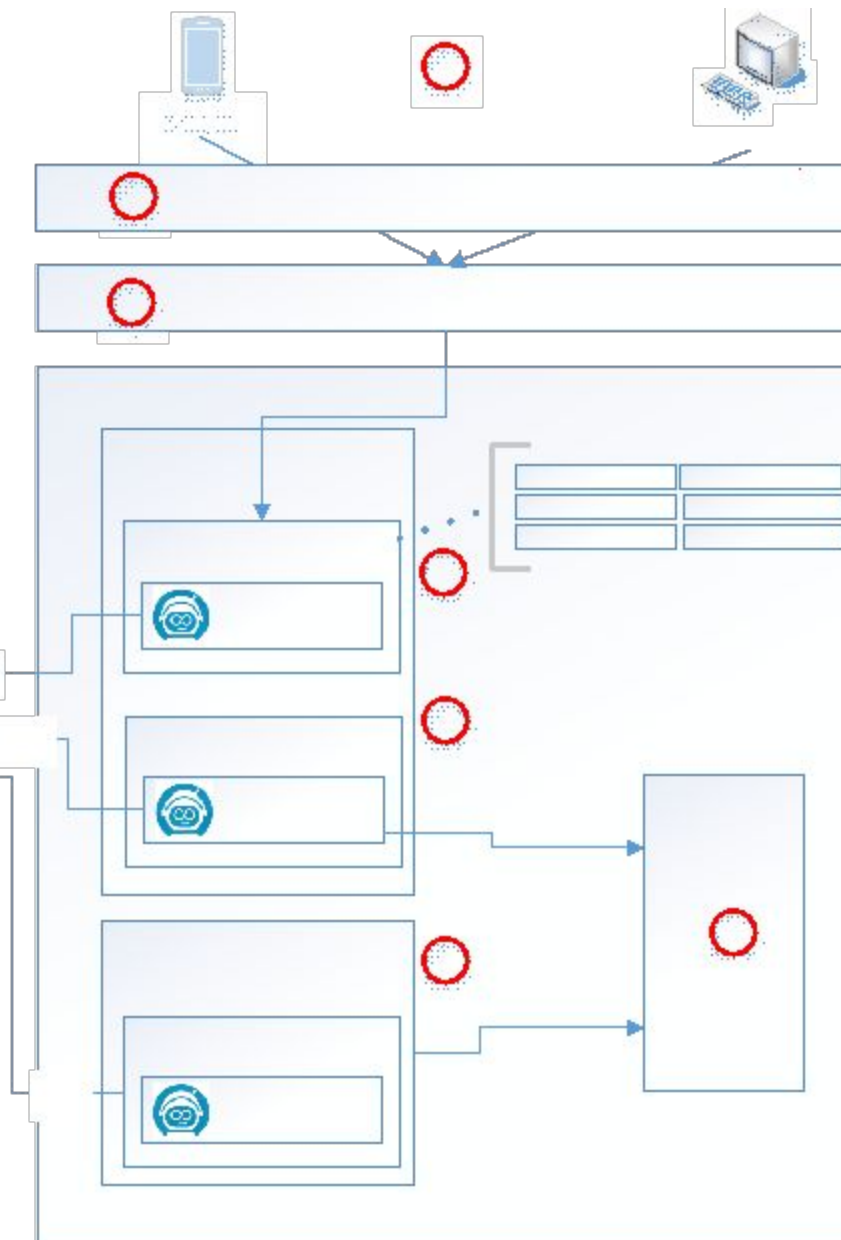
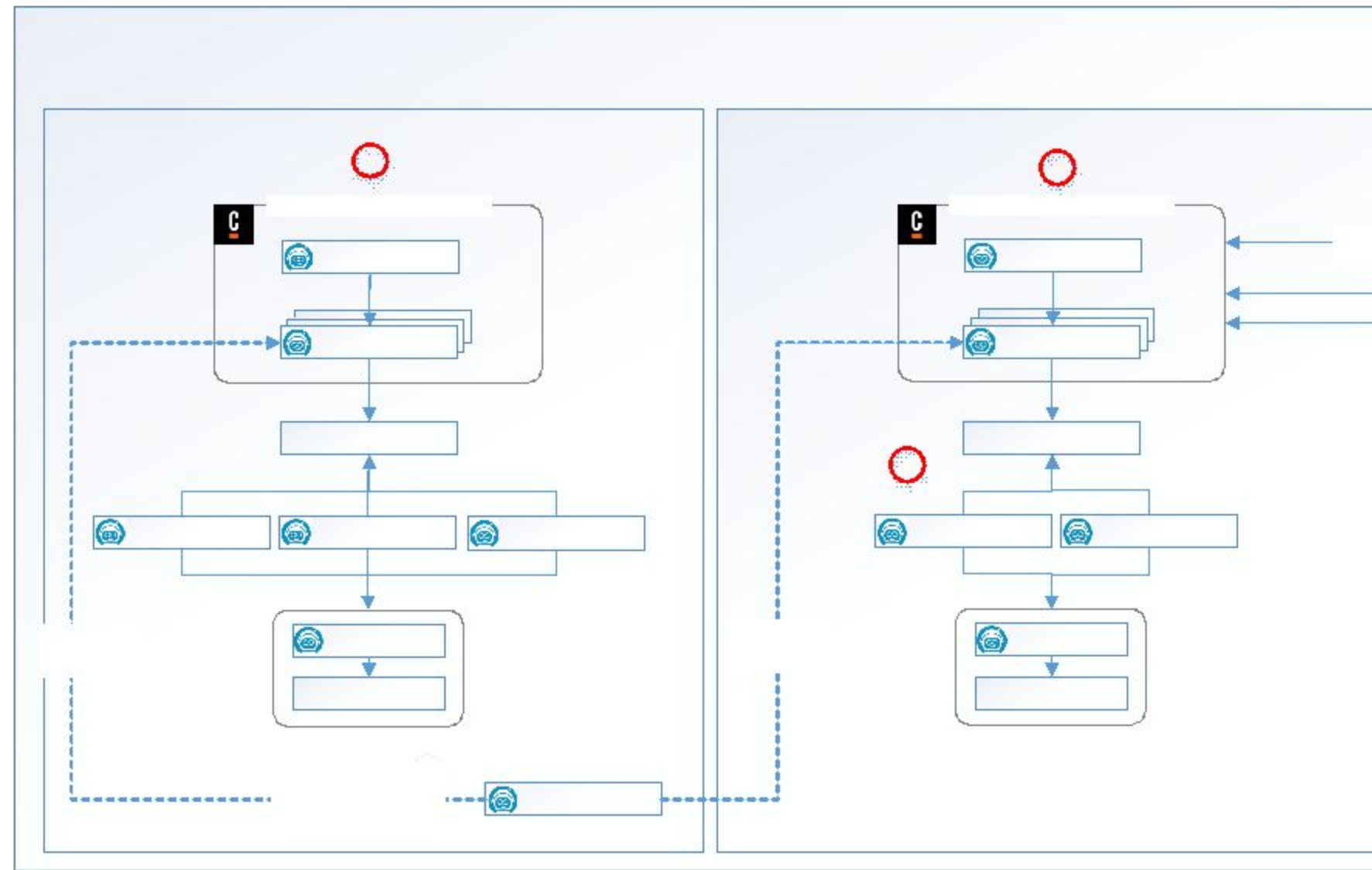
Sample scenario

Orchestrating processes without DSL / orchestration engine



Our vision

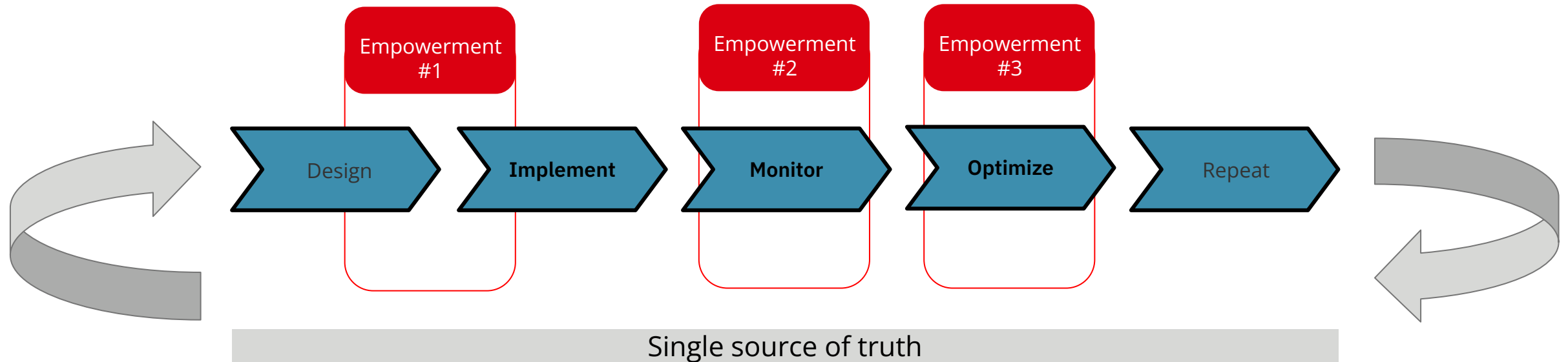
After - Journey Orchestration & Choreography



- ◆ Started in 2023
- ◆ Centralized execution
- ◆ Decentralized event actions
- ◆ Digitized customer journeys

Business empowerment scenario

What we design...
is what we implement..
is what we monitor...
is what we optimize...



Our unique approach

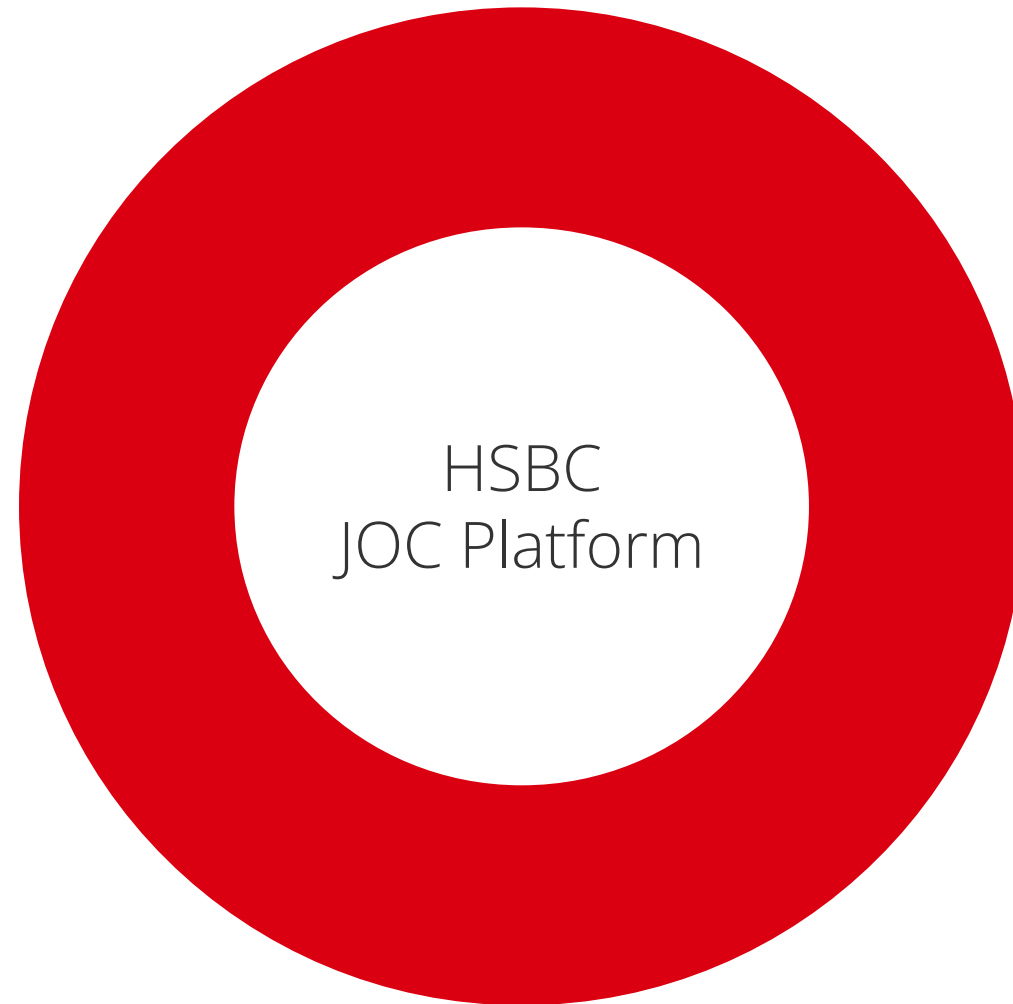
Self-funding model

PRO

- ◆ Minimal investment
- ◆ Prioritizes staying current
- ◆ Proves ROI

CON

- ◆ Circular dependency
- ◆ Higher cost for initial tenants



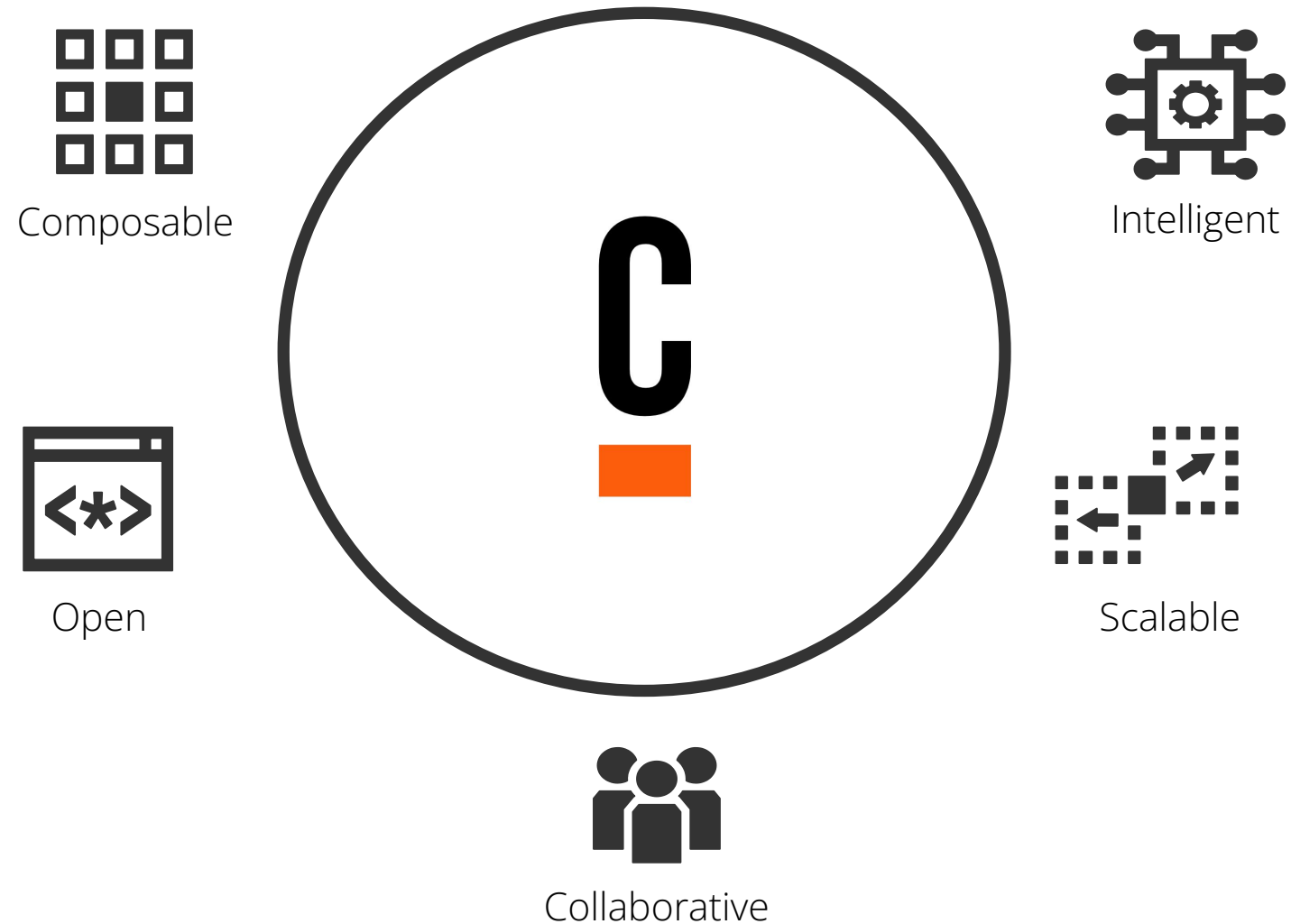
Why Camunda

TECHNOLOGY

- ◆ Process Orchestration
- ◆ Lightweight engine
- ◆ Scalable
- ◆ BPMN / DMN
- ◆ No vendor lock-in

SUPPORT

- ◆ Responsive & collaborative team
- ◆ Product roadmap



Outcomes

Platform Layers

Value Streams

- 2 uses cases live
- Regulatory approvals
- Tens of POCs / POVs

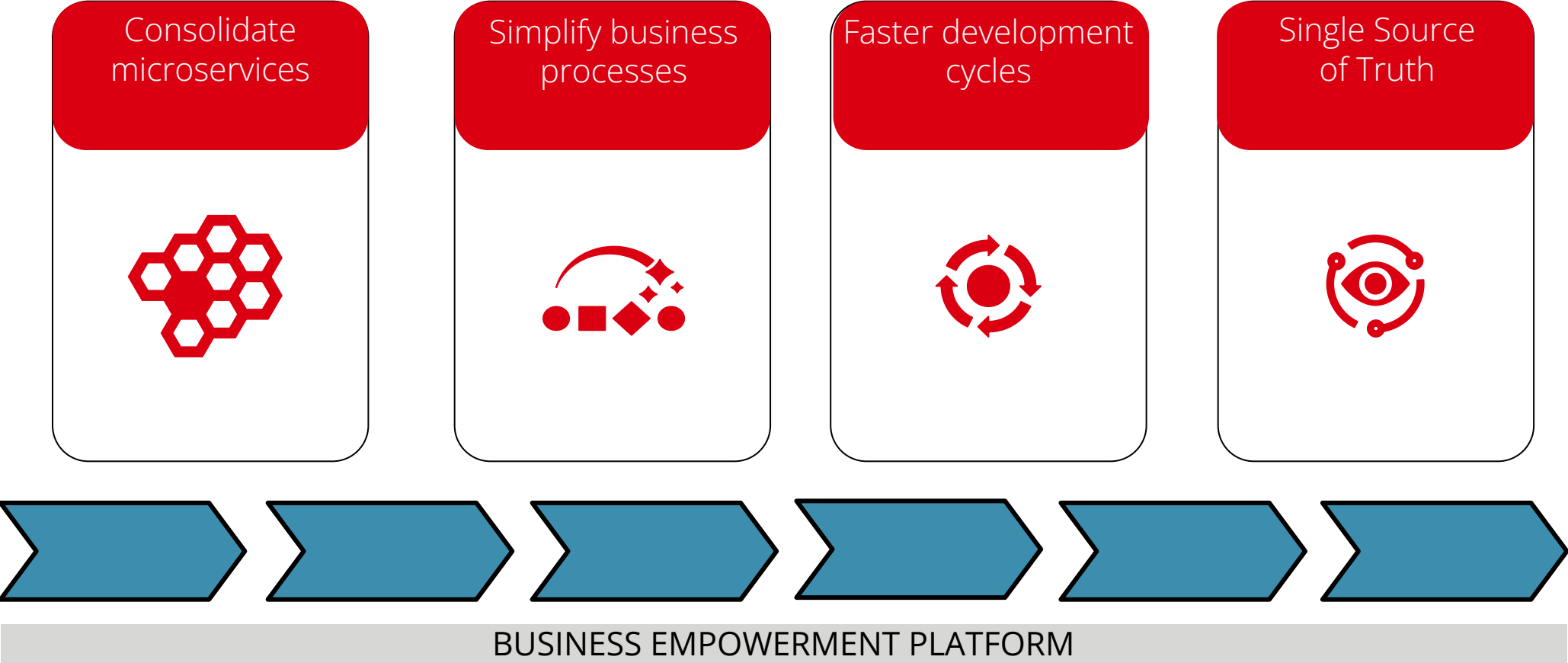
Engineering

- Common APIs / Connectors
- Creative Camunda use for service chains health checks
- BPMN pipeline
- BPMN COE / consulting to value streams

Infrastructure

- 2 points of presence
- ~ 100% IaC automation
- 8.1 □ 8.3 □ 8.6 Installs
- PostgreSQL / Elasticsearch □ RDS / OpenSearch
- Tier 0 designed - Tier 2 certified
- RPO ~ 5 mins (RPO point of failure is allusive!)
- RTO of mins
- 99.9% uptime (10 mins downtime every week)
- Logging, Monitoring, Backups, Recovery, Pen Testing, Capacity & Perf testing

Expectations



Lessons learned / food for thought

- ◆ Kubernetes is hard
- ◆ Move 4th party dependencies to managed services
- ◆ Does your team have database and Elasticsearch skills?
- ◆ Your use case will most likely require updates to the Helm Chart
- ◆ IAC is your friend
- ◆ Air-gapping is tricky
- ◆ Multi-tenancy requests require a call to Identity
- ◆ Zbctl cmd doesn't support Multi-tenancy
- ◆ Connectors have a small dependency on Operate.
- ◆ For REST APIs, think about authentication, availability, performance, etc
- ◆ Stress test your use case.
- ◆ Think through required target RTO and RPO – replication is not a substitute to disaster recovery!
- ◆ Logging, monitoring, alerting

What's next

Platform Layers

Value Streams

- 4 additional uses cases this year

Engineering

- Connector Templates
- Additional Connectors
- Authorization

Infrastructure

- +1 point of presence
- 8.6 → 8.7 → 8.8 Upgrade
- 8.8 Enhancements:
 - Backups
 - Unified Rest API
 - Identity APIs (for 100% IaC automation)
 - WebApp Scaling (for 100% uptime)
 - Optimize support for OpenSearch
 - Tier 0 certification

Thank you

