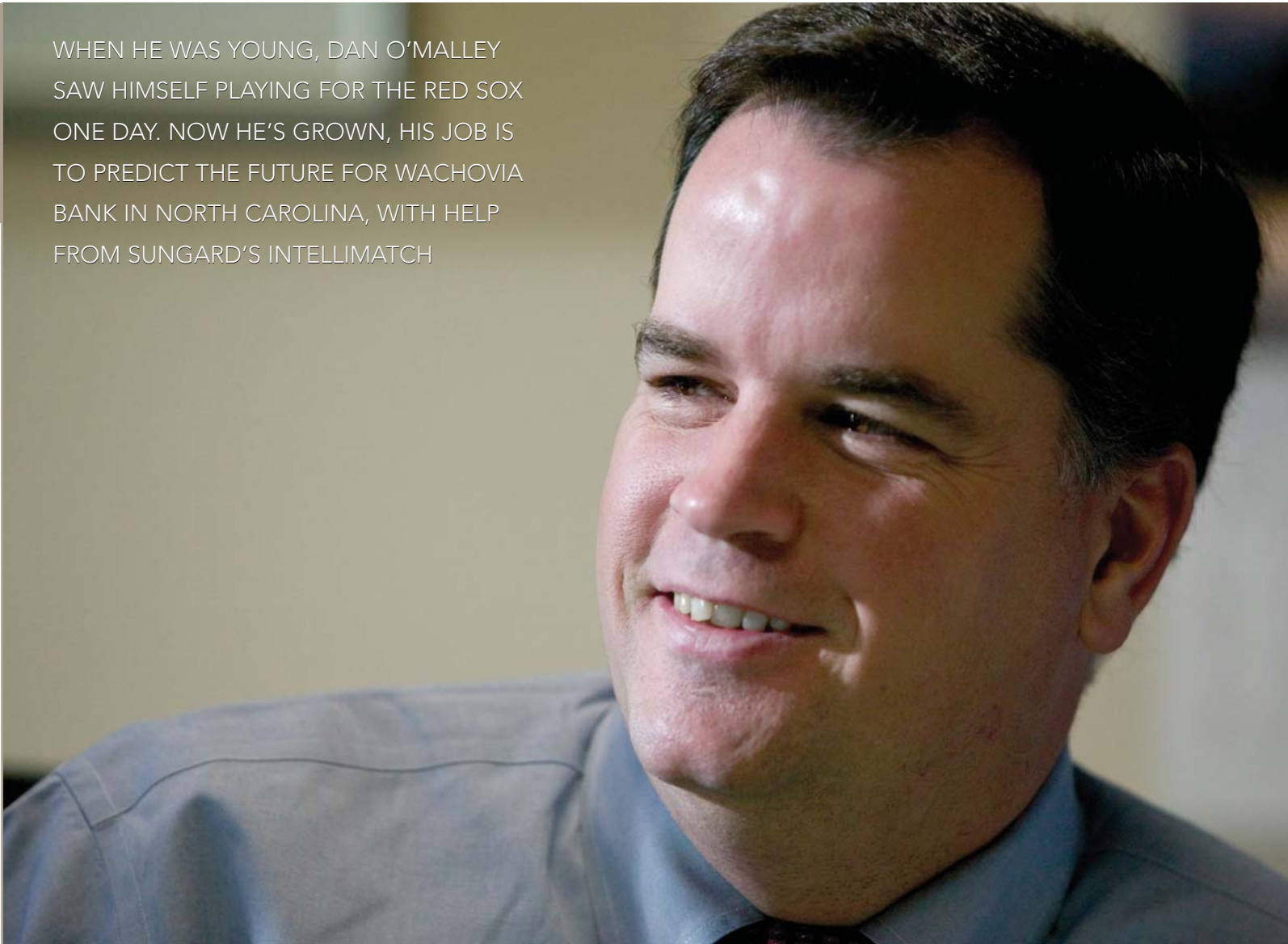


WHEN HE WAS YOUNG, DAN O'MALLEY SAW HIMSELF PLAYING FOR THE RED SOX ONE DAY. NOW HE'S GROWN, HIS JOB IS TO PREDICT THE FUTURE FOR WACHOVIA BANK IN NORTH CAROLINA, WITH HELP FROM SUNGARD'S INTELLIMATCH



Dan O'Malley works diligently with his peer group each day and enjoys a rare luxury in dealing with the world of IT: he is not directly responsible for the demands of production deadlines and daily operations. In fact, it's sometimes the opposite: in his role with Wachovia Bank, NA, Dan's main focus is to think strategically about the future – specifically, the changing needs of the bank's wholesale operations division.

"My team and I have the ability to sit outside the box and creatively assess our business and what's next on the horizon," Dan says. "In fact, we have an agreement with our colleagues that we will not try to process their day-to-day transactions, so long as we can help shape their long-term technical plans."

THE NEXT BIG THING

Dan heads a group called Operations, Products and Solutions (or OP&S), which supports back-office functions for Wachovia's corporate investment banking, commercial loan and international divisions. Among other responsibilities, the group has a direct impact on a range of IT initiatives. "Specifically, we write the functional requirements for new development projects and then manage the user acceptance testing as the projects are completed,"

Dan says. "In other words, we make sure that we're asking for precisely what we need, and that the finished system does precisely what we asked."

At any given time, OP&S is likely to have 50 or more projects under way, ranging from those Dan calls "tweaks" to major strategic initiatives – "multi-year implementations, with large dollar spends, and impacts on multiple systems". As these projects proceed, Dan and a team of six direct reports, each focusing on a line of business, are also continually looking forward, as he says, "to see what's the next big thing coming down the pike – a new product, a new process refinement, or a new use of technology".

Keeping his vision fresh and relevant means maintaining strong connections across the organization. "I sit with my peers on quite a number of steering committees in diverse areas, from international products to corporate investment banking to commercial lending," Dan says. "This gives us the chance to take part as our strategic direction is decided – sometimes playing

HOME LIFE

FAMILY: "Kimberly, my wife of 16 years, and I are the proud parents of three children: an 11-year-old, Colleen; a nine-year-old, Ryan; and a three-year-old, Brendan."

HOME: "We live about 15 miles south of Charlotte."

PASTIMES: "I'm an avid golfer, recovering from a rotator-cuff repair."

VACATION: "We're beach people. We have a place on Oak Island, near Wilmington, NC. We also get to Disneyworld."

HOMETOWN: Long Island, New York.

EDUCATION: Bachelor's degree in MIS from Iona College.

CHILDHOOD DREAM: "To replace Fred Lynn in centerfield for the Red Sox."

CURRENT DREAM: "I'd like to teach – near a beach."



"THERE IS NO ONE SOLUTION YOU CAN APPLY TO EVERY MERGER. OUR APPROACH IS TO LOOK THOUGHTFULLY AT EACH ORGANIZATION, DEFINE THE BEST GO-TO STATE, AND THEN DECIDE TOGETHER HOW TO GET THERE"



devil's advocate, sometimes bringing in an idea from elsewhere in the bank or the industry."

Dan describes one of the most rewarding dimensions of his job as the chance to follow a project from idea through to completion, and then to see its impact. A good example, he says, is IntelliMATCH from SunGard. "This is a system we brought in 1998/99 as a reconciliation tool," Dan says. "It matches records from our general ledger system and various other internal systems to help make sure we are in balance. Our group facilitated the purchase, install and testing of the product and it's now one of the most widely used systems throughout our customer's footprint."

Dan says that the implementation of IntelliMATCH involved a new way of thinking about a familiar challenge: "We changed our business model significantly, from having individual business units each handle their reconciliations independently to a much more centralized approach. Since then, IntelliMATCH has become a core functionality for us. It's grown as we've grown, and we've done a lot of development around it." And he points out that the success of IntelliMATCH is not unique: "At any given point, Wachovia is running at least 25 SunGard products," he says.

MANY MERGERS

Dan's job would be challenging and varied even if the bank he worked for were a static organization. In reality, nothing could be further from the truth: "I've been with Wachovia for eight years," Dan explains. "In that time we've gone through seven or eight major mergers."

Of course, each merger has an impact on wholesale operations, presenting two sets of business processes and IT systems that need to be unified, or at least brought into peaceful

WORK LIFE

BUSINESS HOURS: "I drive my children to school every morning, which I love; get in the office by 8:30 a.m.; and leave around 6:00 or 6:30 at night."

OFFICE: "A nice-size space on the eighth floor with a good view."

LOCATION: "I'm in downtown Charlotte in one of Wachovia's buildings – the Charlotte Plaza building – looking out at Wachovia Tower 1."

BEST THING ABOUT CHARLOTTE: "I love Charlotte. I worked on Wall Street for over 10 years and did the two-hour commute in and out. Here, although people complain about traffic, there really isn't any."

PERSONAL ORGANIZATION: "I rely on my admin, Karen Lambert. I'm on the PC all day and I want nothing to do with it afterwards, so I do not have a Palm Pilot."

DESK HYGIENE: "I'm relatively neat. I try to touch a piece of paper once and then action it appropriately."

DRESS CODE: "Business casual, but I have a jacket within reach."

CORPORATE CULTURE: "Family-friendly and community-oriented."

COMMUNICATION STYLE: "I'm the youngest of seven. I can talk fast, loud, or both."

coexistence – all under tight deadlines and with investors, central banks and regulators looking on. Typically, about half the project volume in Dan's group is driven by merger activity, the most recent event being Wachovia's merger with South Trust Bank.

"One of the things we've discovered through experience," Dan says, "is that there is no one solution you can apply to every merger. Our approach is to look thoughtfully at each organization, define the best go-to state, and then decide together how to get there."

THE SUNGARD SOLUTION: INTELLIMATCH

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