



Transitioning a National Bank's Controls Teams to an Agile Project Management Framework

The Opportunity. Our client's Operations Controls team needed to improve team velocity, increase productivity and provide transparency across their operations and development activities. They historically favored waterfall project management and manual reporting to track progress against their team's backlog; but, when the program expanded, the backlog became unmanageable with their traditional methods and tools.

The Client.

A Fortune 200 company and top-10 national bank that offers a broad array of financial products and services to consumers, small businesses and commercial clients.

"I was a little resistant to the change to Agile and VersionOne due to worry that the learning curve would slow us down. But the exact opposite happened. It was like upgrading from a moped to a race car."

Client Team Member

The Obstacles

The client's willingness to go Agile was affected by the Controls Team's unfamiliarity with the methodology and inability to fully understand the benefits.

In addition, the Operations team was accustomed to using Excel and white boards for tracking progress against their backlog and providing visual management.

Lastly, it would be logistically difficult to efficiently implement the change in methodologies given the Operations teams distribution across three locations and time zones. The client sought additional firepower and agile expertise to drive the program flow.

The Acceleration

The client engaged Celerity's Business Process Management (BPM) Team to bring Agile expertise and management capabilities to their Card Operations teams. Celerity began by first easing the team into Agile with the creation of a storyboard in the Controls area, which was designed with story cards to indicate the "status" of work.

As the transition to Agile matured, the process of creating and updating story cards, while also maintaining the Excel documents and the tracker on the white board, became increasingly time-consuming, effectively breaking team momentum.

The BPM team recommended that the client utilize VersionOne, an Agile project management application, to facilitate a collaborative virtual environment for management activities, like creating and updating the story cards. Upon introduction of the tool, the Excel data was fully transferred to VersionOne and a **customized Kanban storyboard** was digitally implemented for better insight into the controls development status. Team members were then trained by Celerity's Agile experts in two-day planning sessions (performed at each site by the Celerity team) on using both VersionOne and the Agile Kanban methodology.

In subsequent weekly planning sessions, Celerity assisted the Operations team as needed to complete the transition to Agile for the management, development, and continuous improvement of process controls. The client's team quickly embraced the new **Agile framework and collaborative tool, using VersionOne** to

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manage the backlog to completion, and reduce daily progress updates in favor of **real-time updates** made possible by the application.

VersionOne, used within the Agile environment that Celerity helped to create, **accelerated identification of roadblocks and constraints**, improving the team's ability to take appropriate action for resolutions, to effectively distribute tasks among the developers, and to increase development delivery.

Lasting Results

Celerity's BPM experts enabled four nationally distributed Operations Controls teams for one of the nation's leading banks to successfully transition to an Agile project management framework by training team members on the Agile methodology, and leveraging an online collaborative tool to manage and track their work.

As a result, client management recognized the teams for their **remarkably improved delivery results**, and team members quickly became resources for guiding other groups through Agile implementations. Lasting benefits for the client include:

- **Tripled the previous month's delivery output** and **doubled the year-to-date average** in the first month of implementation
- Establishment of a **new baseline for performance** and execution through data analytics around variance of cycle time, capacity and workload management, and forecasting
- A **VersionOne application** tailored to manage each team's unique backlog of work, with materials specific to team member project roles
- **Transparent, real-time status and performance metrics** through the VersionOne reports

Tools and Methodologies Used

- Agile project management
- Scrum roles, artifacts, and ceremonies
- Customized Kanban storyboard and pull system
- VersionOne enterprise software

About Celerity

Celerity is a modern consultancy that helps businesses win and thrive in the digital economy. We bridge gaps between technology, process, and digital creativity by designing experience-driven solutions that deepen engagement with your customers and employees alike.

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