



PLANVIEW DAY 2022 ROADSHOW

CHICAGO | June 28th

Huntington Agile Journey

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Huntington National Bank

Huntington National Bank is a \$177 billion asset regional bank holding company headquartered in Columbus, Ohio.

Founded in 1866, The Huntington National Bank and its affiliates provide consumers, small and middle-market businesses, corporations, municipalities, and other organizations with a comprehensive suite of banking, payments, wealth management, and risk management products and services.

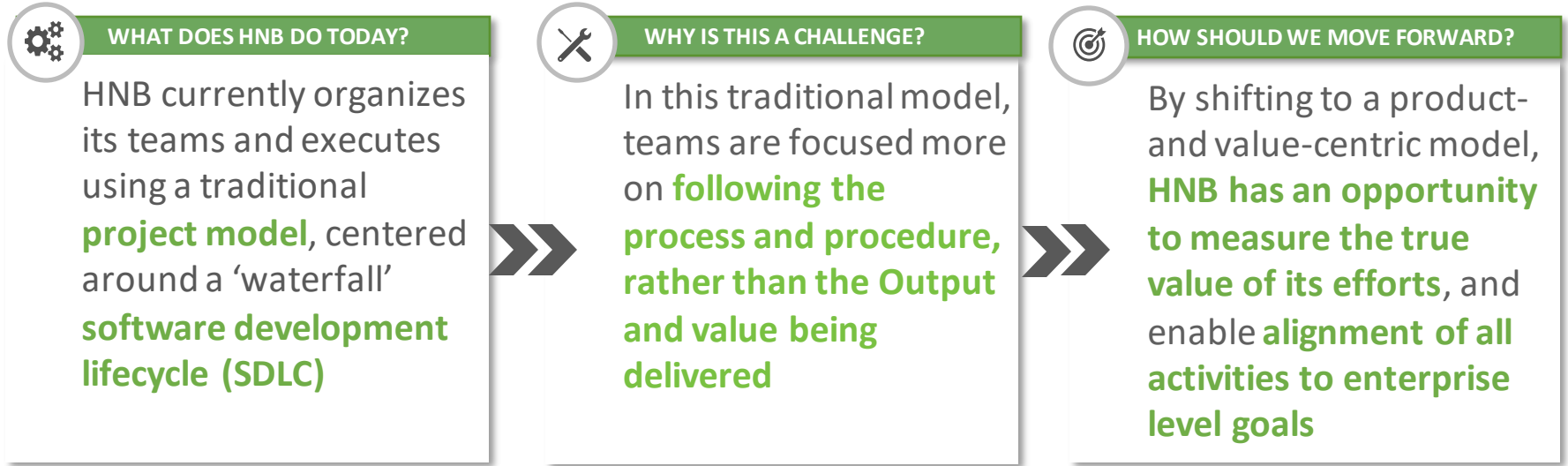
Huntington operates more than 1,000 branches in 11 states, with certain businesses operating in extended geographies.

Huntington is in the second year of an enterprise-wide agile transformation.



Project to Product: A Case for Change

HNB has an opportunity to evolve how the portfolio of business solutions is delivered, funded, prioritized, and governed, by shifting focus away from ‘project-oriented’ delivery to ‘product-centric Value Streams’. Business Outputs will be enabled via a dedicated, appropriately sized technology budget (people and capital) to deliver the maximum value to the business at a sustained cadence



Current vs. Future State: An Operational and Behavioral Shift



TODAY
Projects

Thinking about **tech capacity in terms of projects that deliver a specified scope** within a specified timeframe

Success is **defined by being on-time and under budget**; Reporting tells us if we will “spend” all the investment - success is to underspend

“**My IT Hours**”: the number of hours available isn’t a valuable measurement of investment capacity

Defining a **list of projects** as part of annual or quarterly planning and **handing them off** for IT estimation to assess hours and size

Measuring SDLC Milestones: A project is “on time,” “in scope,” or “on budget” is not a full representation of what value was added to the business once delivered

Annual Plans: Planning processes result in a list of projects to project hours available and IT project plans for resources.

Business Cases: Requires a new business cases for every new feature, business driven enhancements, system upgrade, etc. as a new project.



Capacity



Definition of Success



Metrics



Project Planning



Reporting



Forecasting



Strategy

Establish fixed capacity teams that are fully dedicated to a product portfolio** and can deliver value iteratively as long as the product exists

Success is **measured by improvements** in metrics tied to business Output; Reporting tells us if will are on track to deliver desired Outputs and if we need to re-align investment dollars

IT capacity is fixed and therefore the measure of the teams is no longer hours but predictable output that is mapped to the OKR's and goals

Business leaders' role in annual and quarterly planning is to identify and prioritize Outputs. IT enables business Outputs through technology. **Business and tech should partner** throughout the process; **no handoffs**.

Measuring Business Outputs: Progress against measurable business Outputs provides clarity into whether the product is still worth the investment

Perpetual Planning & Prioritization: Business and IT should plan collaboratively. Continuous review of progress against OKRs, and re-prioritization of work as needed.

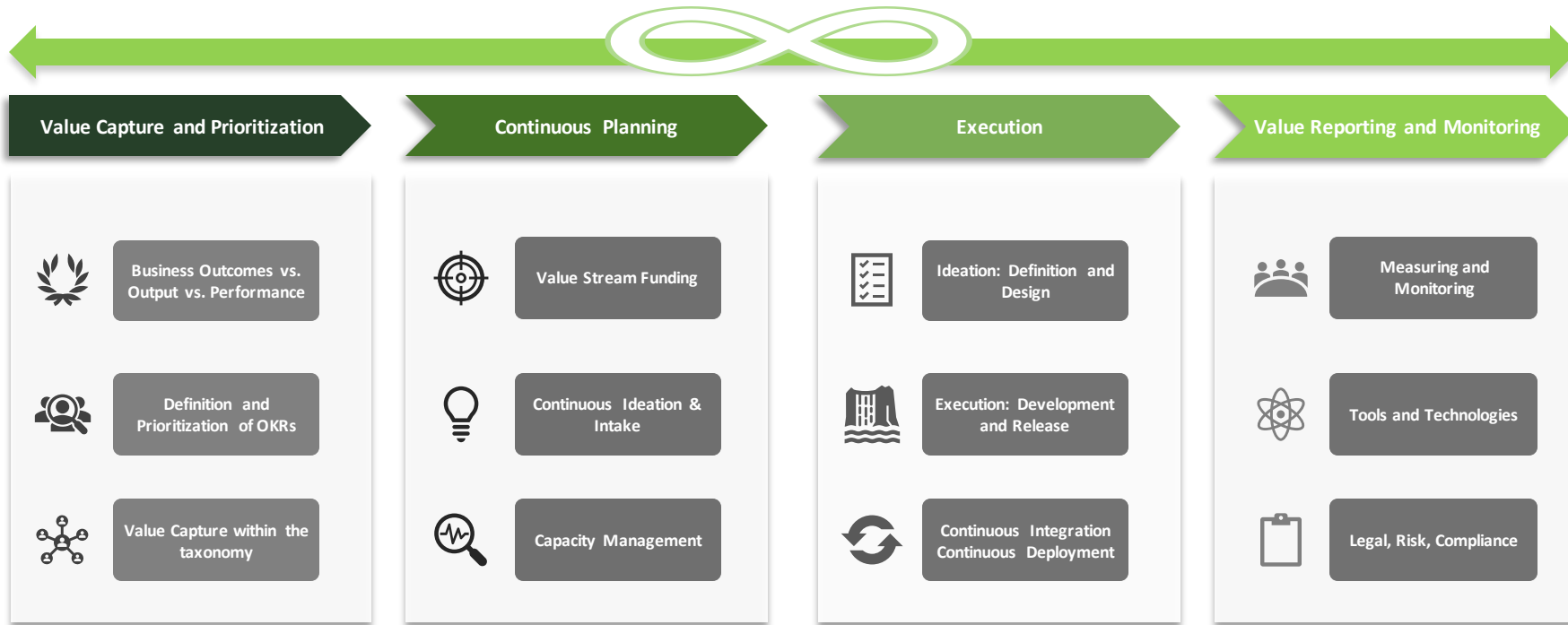
Value Proposition Over Time: Understands the overall level of investment made compared to the ongoing value it drives for the business; making adjustments to investment based on strategic priority.

FUTURE
Value Streams



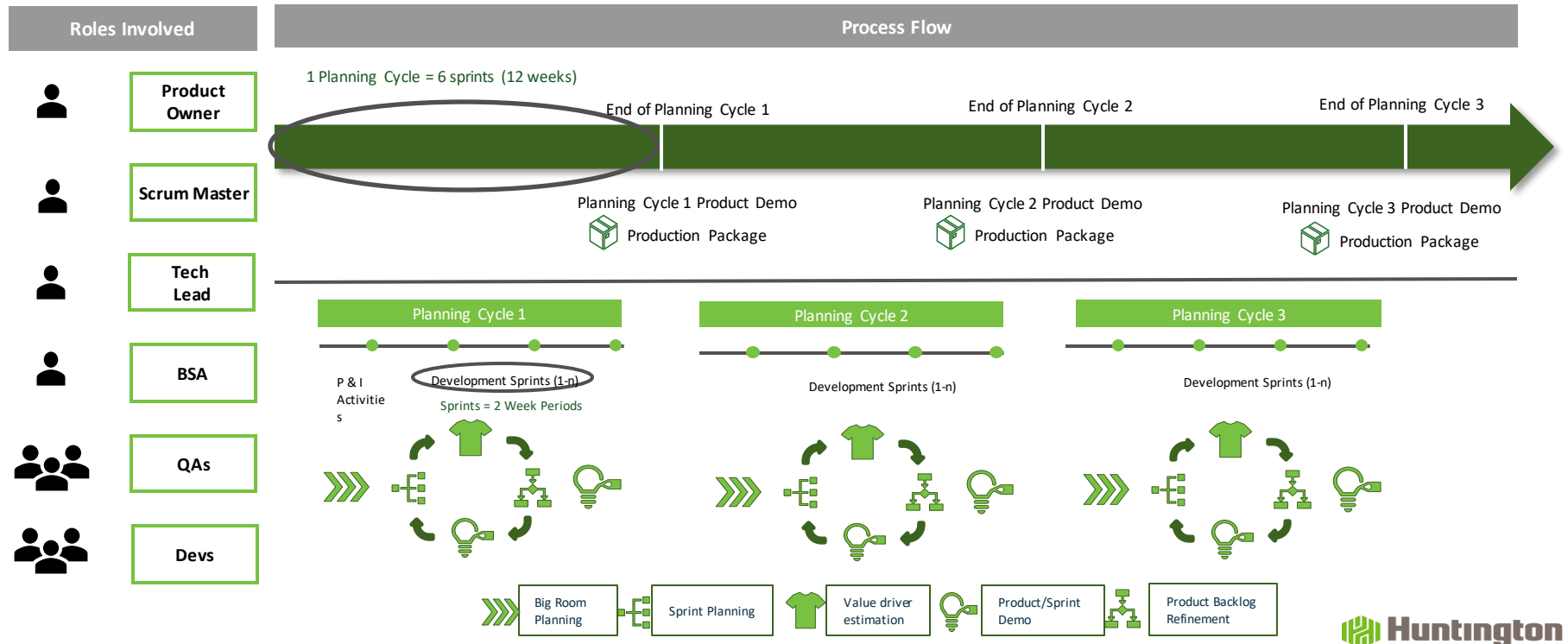
Value Stream Delivery E2E Lifecycle

Defining the E2E lifecycle up front will allow Huntington to proceed incrementally, developing capabilities and processes to address the most immediate needs and pain points



Execution: Process Flow

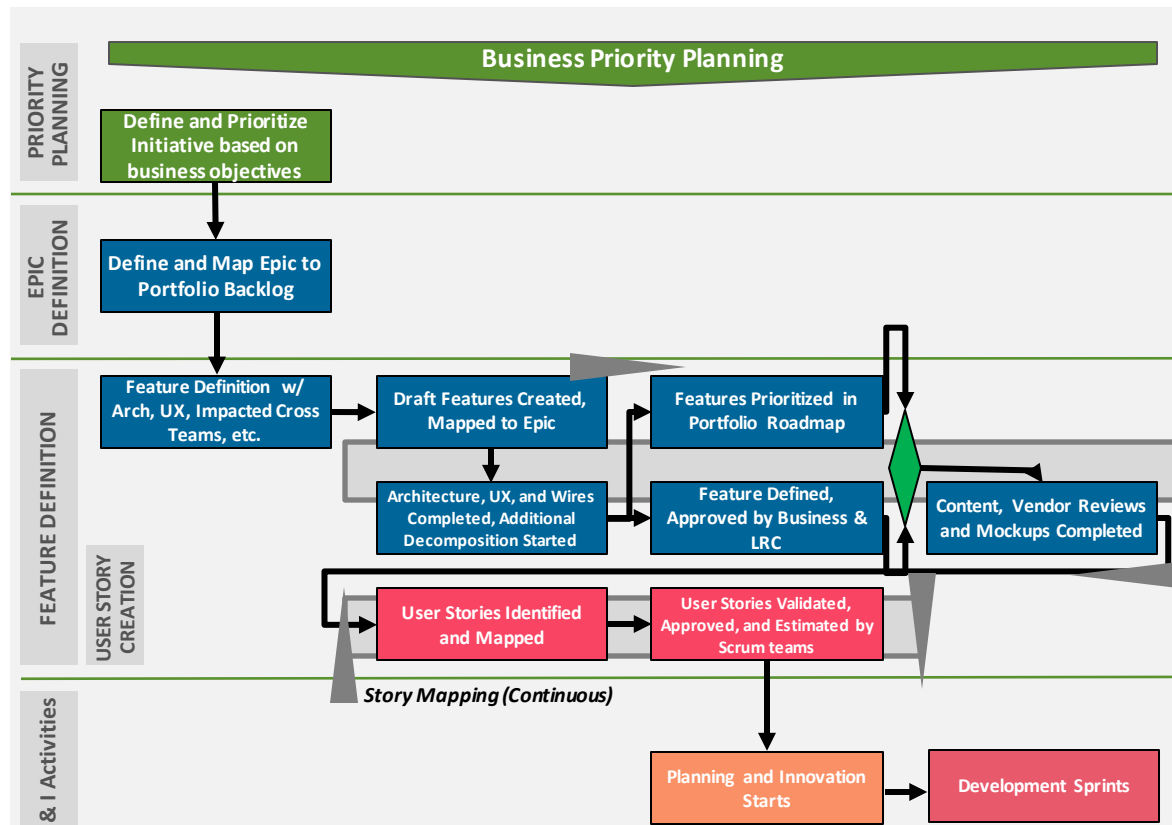
Modern agile practices break down workflows into continuous Planning Cycles, allowing teams to steadily provide the most valuable releases to Customers while also maximizing team efficiency





Preparation: Ideation to Decomposition

Business leaders define high-level objectives which are broken down in several iterations to prepare User Stories for Sprints



ADDITIONAL DETAILS

The business team **builds a prioritized, lean portfolio of work** to deliver value as quickly as possible via initiatives

Big Room Planning periodically selects next highest priority work, validates prior work completion, and coordinates cross-teams to **determine a 30-60-90-day plan**, including interdependencies. This is a **continuous, on-going process**.

Feature Definition identifies and prioritizes features for scrum team backlogs. The outputs are Story Mapping Inputs. Sessions identify acceptance criteria and secure approvals from stakeholders

Within **Story Mapping**, scrum teams **refine Features into user stories**, completes additional backlog refinement to ensure all user stories are in ADO, and receive approval to begin development work (user stories meet the definition of done)

This **workflow enables the Planning and Innovation Activities readiness**, expediting alignment through upfront cross collaboration and due diligence to enable delivery teams to quickly move from Story Mapping to development

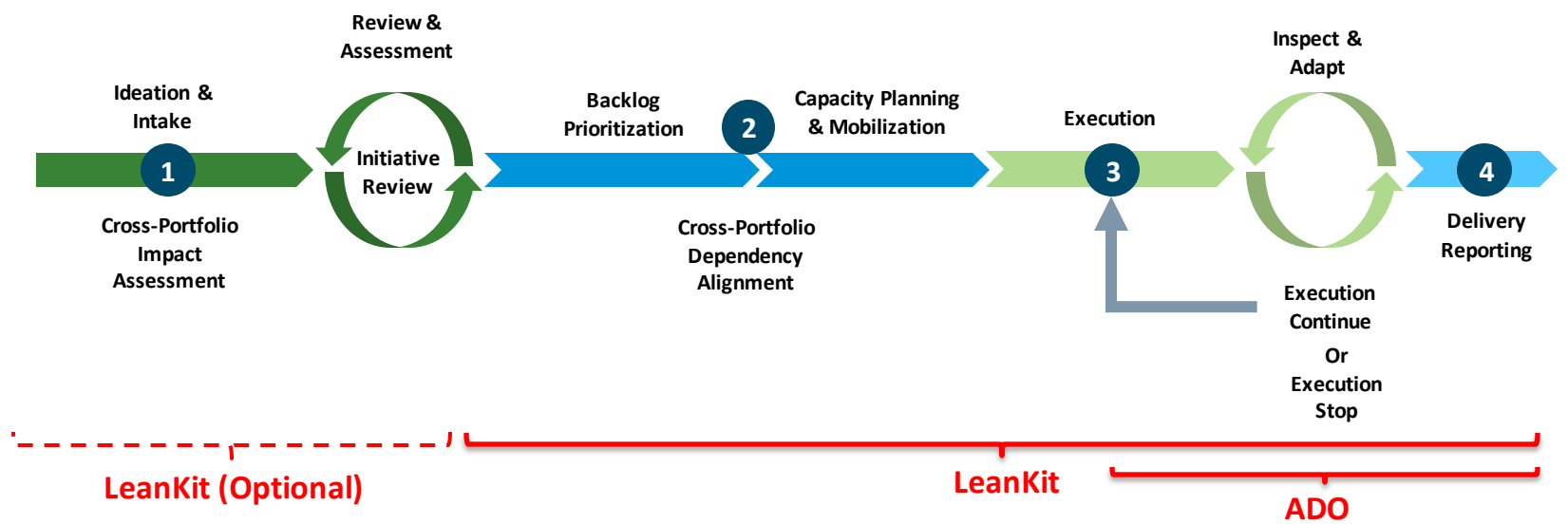
Activities that may go through multiple cycles before moving forward



Overlay of Tools and the Delivery Lifecycle at HNB

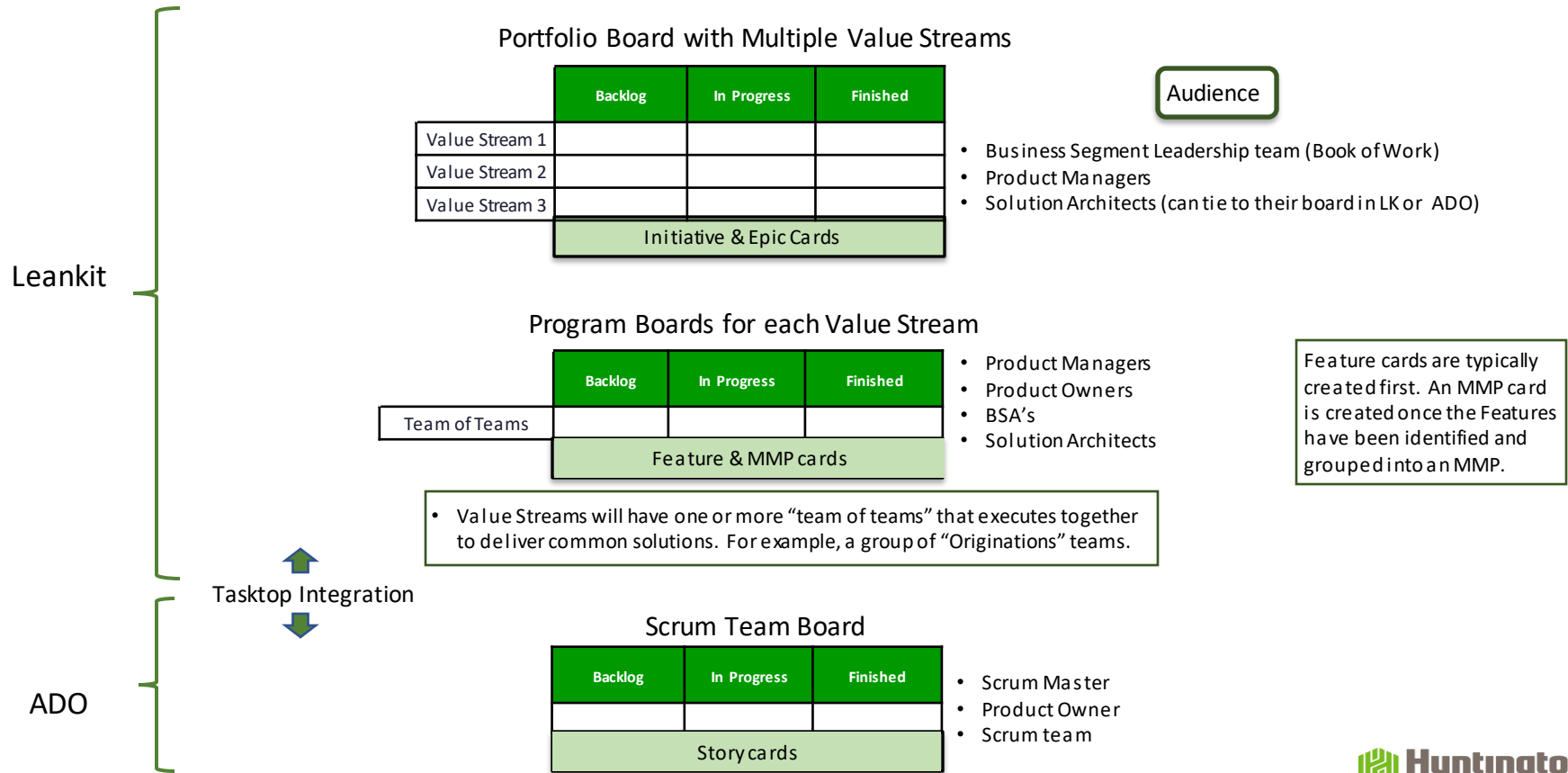
HNB tools are enablers to drive measurable, consistent, and predictable governance within segments to accelerate and optimize value delivery across the enterprise

LeanKit is used at the Portfolio & Value Stream level ; ADO is used at the Scrum Team level



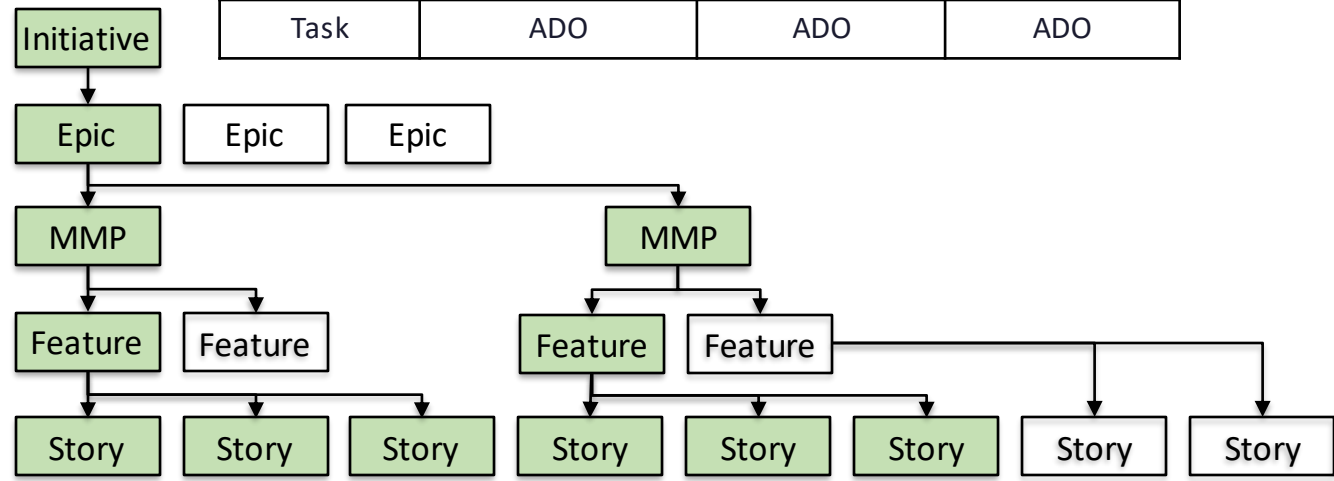
Legend	Value Capture and Prioritization	Continuous Planning	Execution	Value Monitor and Reporting

Portfolio Flow & Boards



Data Hierarchy

	Created in	Visible	Edit
Initiative	Leankit	Leankit only	Leankit
Epic	Leankit	Both	Leankit
MMP/MVP	Leankit	Both	Both
Feature	Leankit	Both	Both
Story	ADO	Both	ADO
Task	ADO	ADO	ADO





Flow Metrics

Flow is also the measure of how efficient an organization is at delivering value. The Flow Framework was created by can be used to measure different aspects of flow. In addition, Business Value is used to measure how portfolios, value streams and teams are delivering against their planned business objectives. Managing exceptions and blockers is also important for achieving effective Flow.

Metric	Description	Reporting
Business Value	Planned vs. actual business value	Leankit OKR reporting
Flow Distribution	The portion of each backlog item type in the flow	Leankit Flow Distribution report
Flow Time (Lead/Cycle Time)	Is time-to-value getting shorter? Time elapsed from when an item enters the workflow to when it is released to the customer	Leankit Speed Report
Flow Load	Is demand outweighing capacity? Total work in progress across the steps in the flow	Leankit Flow Report (Cumulative Flow Diagram)
Flow Efficiency	Is work upstream in a wait state holding up delivery? The portion of the time backlog items are actively worked on vs. the total time elapsed	Leankit Efficiency Report
Flow Velocity	Is value delivery accelerating? Number of items completed in a given time (e.g. Story Points)	ADO velocity reporting
Exceptions & Blockers	Blockers impact Flow; persistent Blockers are areas for improvement	Leankit Exceptions Report





Accomplishments and What's Next

Accomplishments

- Established a Value Management Office (VMO) to lead the transition
- Engaged executive leaders to gain support for the transition
- The majority of the portfolios in the Consumer and Commercial Banks have adopted our Value Stream model
 - Includes funding by value stream and initiating continuous planning
 - Moving to our agile execution model
- Established a coaching origination to train and coach new portfolios joining our model

What's Next

- Complete the integration of Leankit and ADO to manage flow, provide end to end visibility of all work with consistent metrics and reporting
- Implement the use of OKRs across all portfolios
- Bring the remaining portfolios into our Value Stream model... expand the breath and depth of the transformation
- Drive continuous improvement and correct any regression
- Add Continuous Delivery practices and tools to drive more automation and efficiency including a release when ready capability



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Thank you!

