



PLANVIEW DAY 2022 ROADSHOW

LONDON | 16th June

WoW* by Stealth

How driving adoption of LeanKit
made us more agile

Kevin Meddeman

EPM Transformation Manager,
NatWest

*Ways of Working



NatWest
Group



The NatWest Group

The NatWest Group's origins date back to the 1640's and today it serves over 19 million customers with our recognisable brands



- Continuous, on-going changes including becoming purpose-led
- Our purpose is to champion potential, helping people, families and businesses to thrive



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Group



Who Are We and What Do We Do?



What are we called?

EPM Transformation

Where do we work?

Finance, Risk, Audit &
Legal Tech



Who are our partners?

Change Centre of Excellence

Transformation

Finance

Data & Analytics



Who are our customers

~ 250-350 Programmes & ARTS

~ 3,500 Projects

~ 3,500 E1 Users

~ 10,000 LeanKit Users



What do we do

We support:

- The NatWest change tool suite
- Change Framework, Ideal To Value
- A hybrid Investment Portfolio
- Integrated scaled agile architecture



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Our Journey So Far



What Did We Do?

- 1 Started small (100-200), mix of different teams, Minimum control, and best practices
- 2 Slowly grew the pilot organically, leveraged Learning and Development collateral. Diverse teams
- 3 Decentralised support & user mgmt. – 2 guides, with detail linked to the success centre, centralised license mgmt.
- 4 Organisational unit onboarding and board structures introduced (5.5k active users), began developing metrics at scale

4 Structuring & Optimising Boards and Their Uses

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Next Steps

Outcomes & Lean Portfolio Management

Integrated Architecture

Cross-team Planning & Agile Delivery

Team Delivery (JIRA, LeanKit)

Increase Userbase +7k

Industrialise & Leverage Metrics

Learn Fast & Try New Ideas

Standardise Taxonomy

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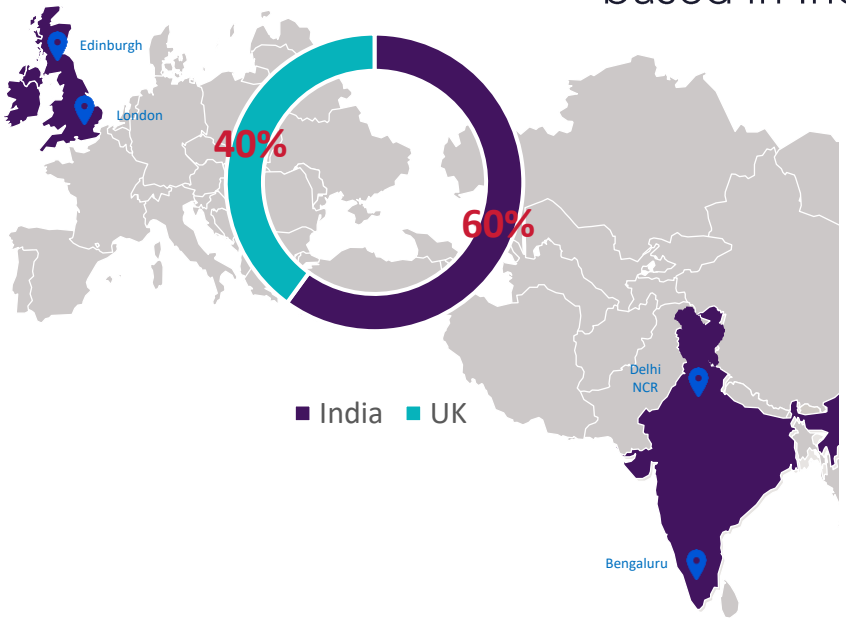
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Where Are We Now

Most of our change and services teams are geographically distributed, with **60%** of Technology based in India.

Technology



The increase of our user base over the last 2 years was in the backdrop of the Covid Pandemic.

Did this help or hinder us becoming more agile?





Generalised Characteristics for Approaches

ID	Task Name	Duration	Start	Finish	Predecessors	Sep 21 '22	Sep 28 '22
						S	M
1	Get data about Mortgage	2 days	Wed 9/21/22	Thu 9/22/22			
2	What is a derivative?	2 days	Fri 9/24/22	Thu 9/29/22			
3	Financial Instruments	2 days?	Fri 9/24/22	Mon 9/27/22			
4	credit swaps	2 days	Fri 9/24/22	Mon 9/28/22			
5	interest rates	2 days	Fri 9/24/22	Mon 9/28/22			
6	treasury bills	2 days	Fri 9/24/22	Mon 9/28/22			
7	bank assets	1 day?	Fri 9/24/22	Fri 9/24/22			
8	Compliance Meetings	2 days	Tue 9/28/22	Wed 9/29/22			
9	Deliverable Oversight	2 days	Tue 9/28/22	Wed 9/29/22			
10	Golden Parachute/T	1 day	Tue 9/28/22	Tue 9/28/22			
11	Pro	1 day	Tue 9/28/22	Tue 9/28/22			
12	Con	1 day	Tue 9/28/22	Tue 9/28/22			
13	Wall Street Reaction	2 days	Wed 10/1/22	Thu 10/03/22			
14	Main Street Reaction	2 days	Wed 10/1/22	Thu 10/03/22			
15	Introduit Real SE	0 days	Thu 10/03/22	Thu 10/03/22			



- Plan
- Execute
- Review
- Retro

- Difficult to consume and digest
- Requires line by line reviews
- Centralised ownership & technical
- Epic replans efforts required for changes

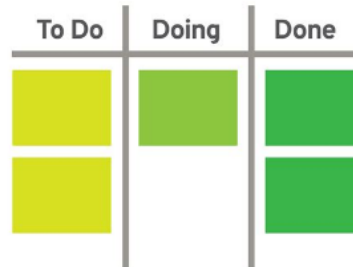
- Visually easy to consume
- Decentralised board designs & management
- Democratised display of work
- No Single Point of failure



Generalised UX for Approaches

ID	Task Name	Duration	Start	Finish	Predecessors
1	Get data about Mortgage	2 days	Wed 9/24/00	Thu 9/25/00	
2	What is a derivative?	2 days	Wed 9/24/00	Thu 9/25/00	
3	Financial Instruments	2 days?	Fri 9/26/00	Mon 9/29/00	1, 2
4	Profit Issues	2 days	Fri 9/26/00	Mon 9/29/00	3
5	Interest rates	2 days	Fri 9/26/00	Mon 9/29/00	3
6	Necessary info	2 days	Fri 9/26/00	Mon 9/29/00	3
7	Bank assets	1 day?	Fri 9/26/00	Fri 9/26/00	3
8	Compliance Meetings	2 days	Tue 9/28/00	Wed 9/29/00	3
9	Deliverable Oversight	2 days	Tue 9/28/00	Wed 9/29/00	3
10	Golden Parachutes?	1 day	Tue 9/28/00	Tue 9/28/00	3
11	Pro	1 day	Tue 9/28/00	Tue 9/28/00	3
12	Con	1 day	Tue 9/28/00	Tue 9/28/00	3
13	Wall Street Reaction	2 days	Wed 10/1/00	Thu 10/2/00	11, 12
14	Main Street Reaction	2 days	Wed 10/1/00	Thu 10/2/00	11, 12
15	Introduit Real SE	0 days	Thu 10/3/00	Thu 10/3/00	13, 14

- Capacity drain on your time / productivity
- You have limited input /influence on delivery style and
- Siloed working through task assignment



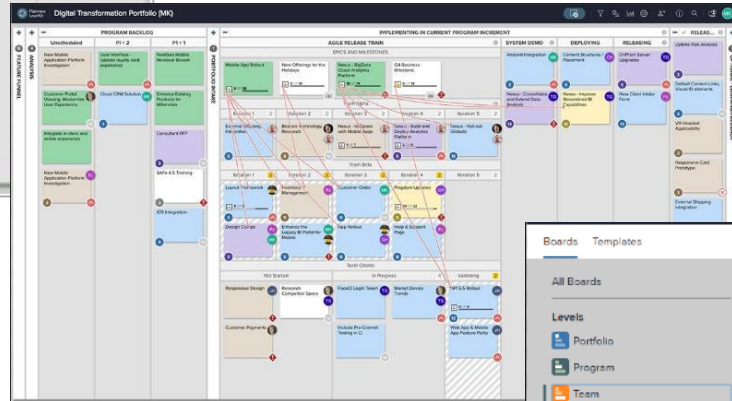
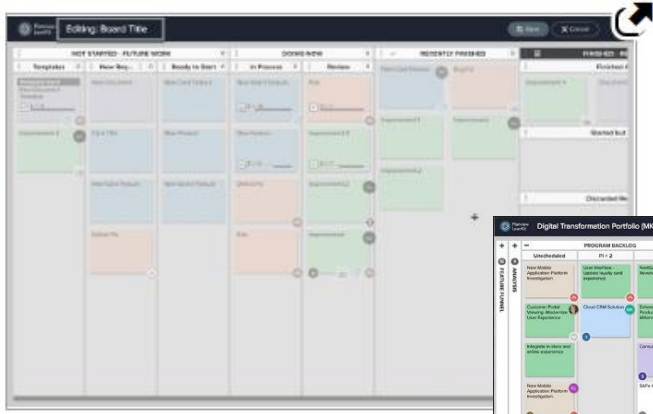
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Level 1 Visibility

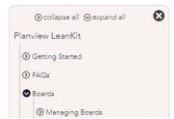


1 Visibility

- Team level collaboration
- Visualising work
- Visualising the work flow
- Breaking down work
- Connecting work

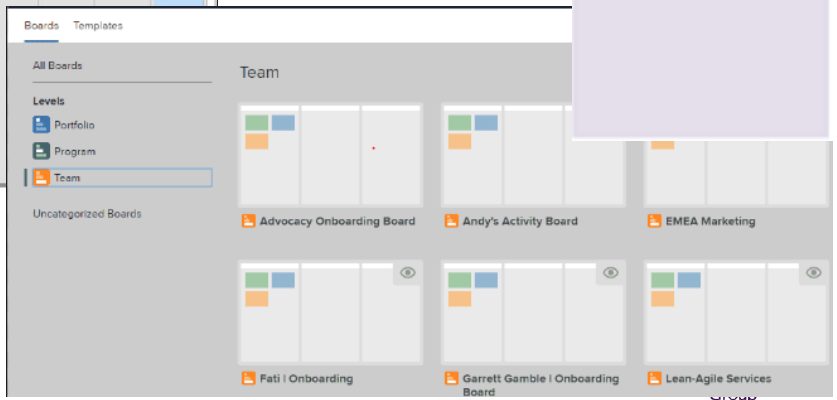
UNDERSTANDING BOARDS

How to Conduct a Board Review



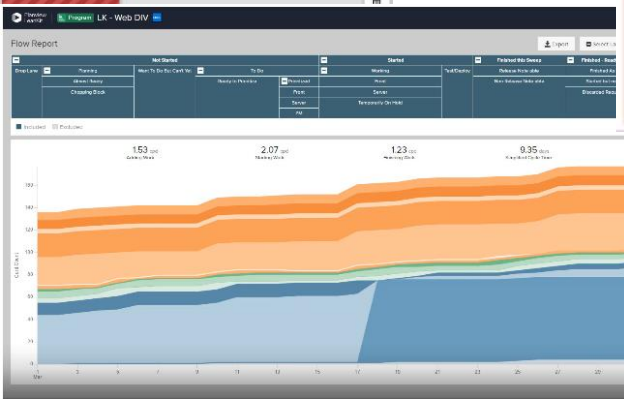
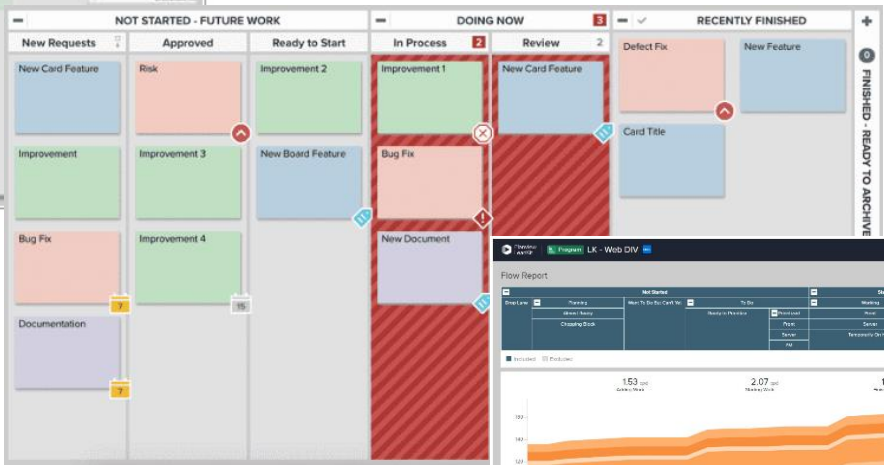
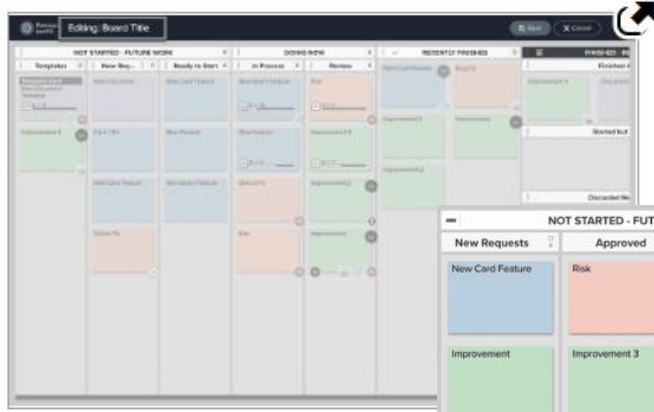
The main goal of Kanban is to make issues rise to the surface. Visualizing our work via LeanKit's Kanban boards gives us a way to better see and manage the flow of that work as it moves through our process. We then use work-in-process limits and the concept of a pull system to constrain how much work we tackle at one time. These constraints keep our tendency to ignore our pain points in check by forcing them to the surface of our visualization, allowing us to find ways to solve them. But, in order to insure that your board can help you identify these problems, sometimes you need to reevaluate your board setup.

Your Board Should Accurately Represent Your Work.





Level 2 Sustainability & WIP



2 Sustainability

- Introducing WIP limits, controlling context switching, bottlenecks and avoiding over burdening
- Pulling work from left to right (Backlog, in Progress, Done) in the work flow
- Early learning and continuous delivery





Level 3 Measurement

Details

Title
[Input field]

Description
Use "@Jane_Smith" to notify a teammate.

Assigned Users
No Assigned User

Planned Start DD/MM/YYYY **Planned Finish** DD/MM/YYYY

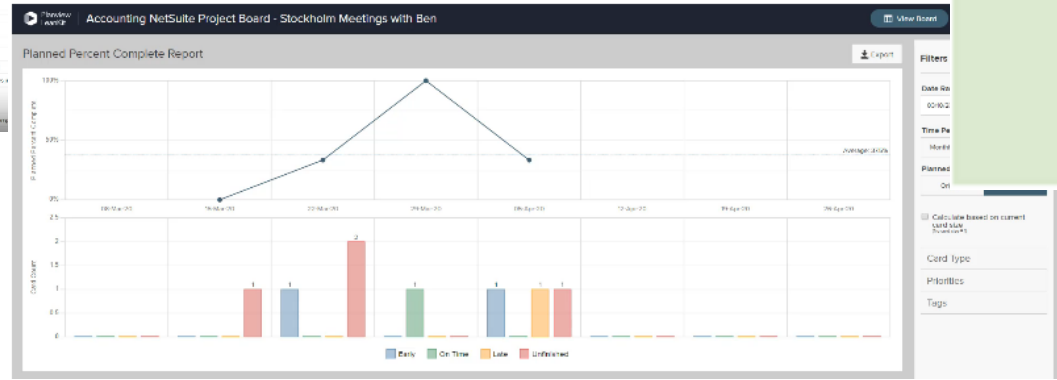
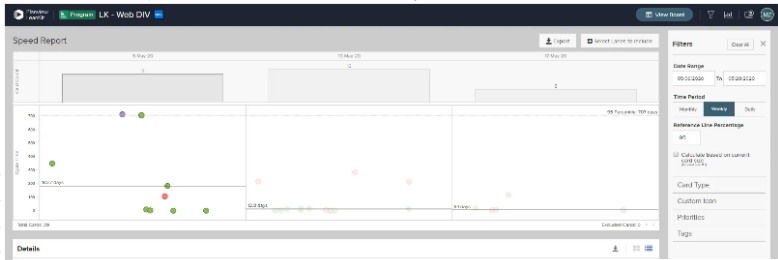
Header
Auto-increment

Priority

Card Type
User Story

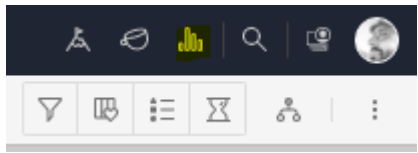
Tags

Save & Close Cancel



3 Measurement

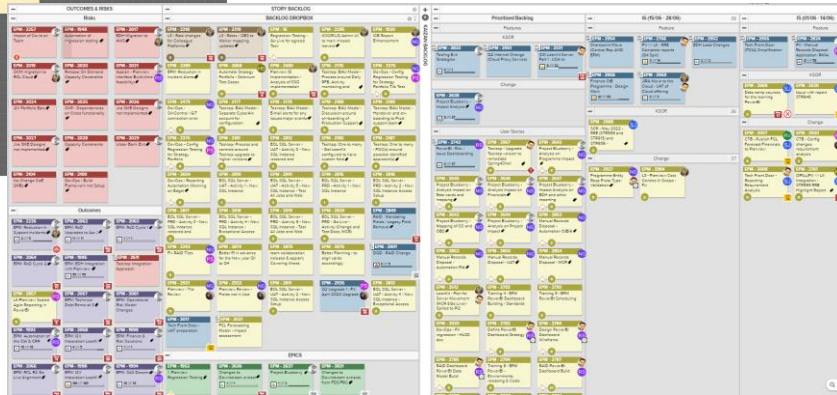
- Team driven policies
- Metrics – output, flow and velocity
- Delivery cadence
- The Idea to Value metric – from inception to outcome





Level 4 Continuous Improvement

<p>MORE</p> <ul style="list-style-type: none"> Working as a single team and having flexibility in our collective approaches Break down changes logically into smaller logical issues IS/CS Transformation - Leuker's JPB Transformation flow - Considering changes for planning before formal drop of TDS 	<p>BETTER</p> <ul style="list-style-type: none"> We need the right level of governance within Data and modelling to assess and clear to go back to TDS version 4 - sprint implementation and communicate to both Better visibility into which changes are assessed and clear to go back to TDS version 4 - sprint implementation and communicate to both
<p>DIFFERENT</p> <ul style="list-style-type: none"> Review the changes in each Tech Spec version for CS and assign priority Incorporate complexity dimension when assessing impact assessment How we track issues/defects from TDS through to delivery Specify changes / additions when publishing TDS 	<p>LESS</p> <ul style="list-style-type: none"> Don't reconcile the full set of requirements for few changes in requirements Reduce number of tickets across data, modelling and tech



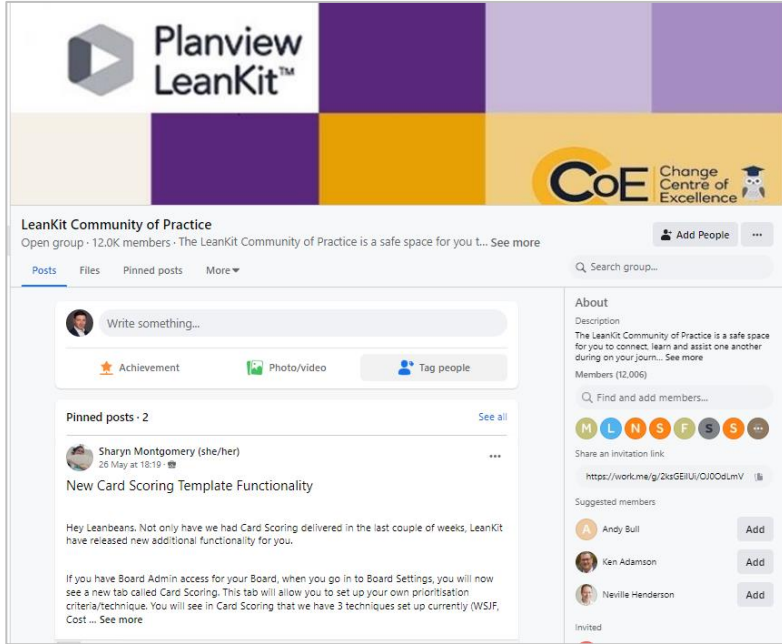
4 Continuous Improvement

- Team measure effectiveness by tracking flow, quality and throughput lead times
- Processes and ways of working are modified, reviewed and improved
- Board is reviewed and reflects any new process changes





Collaborative Support Model & Community



The creation of an active CoP with 12k in the group, where users actively support each other across the levels of maturity

Provides confidence that the application does benefit teams for those who are about or new to adopting

This is not an Agile CoE or Kanban CoE



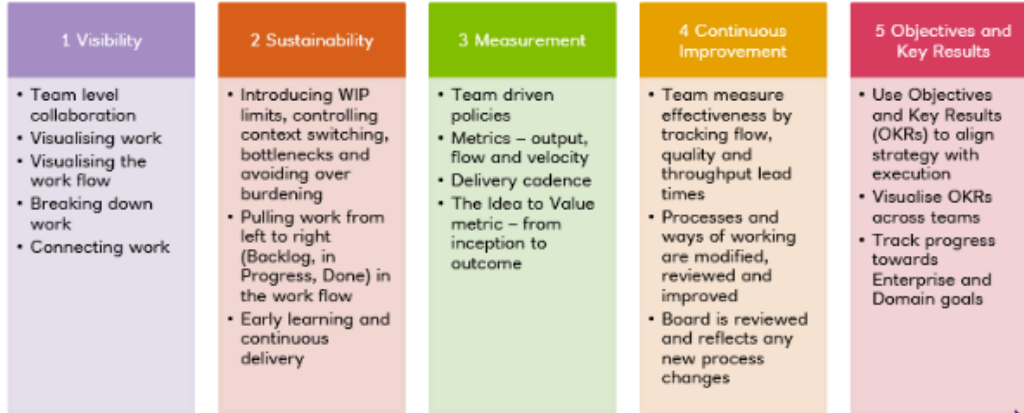


Let Usage Naturally Drive Maturity

We have just given people enough support to get started and then at each step up in their maturity

It is now starting to happen with our integrations pilot as people mature, they contact us to onboard

LeanKit Maturity Model



Maturity





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Thank you!

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