

planview®  
**ACCELERATE™**  
COLLABORATE. INSPIRE. GROW.

September 13-14, 2022

# Agile by Stealth

## How Driving the Adoption of Planview LeanKit Made Us More Agile

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NatWest



# 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

# 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

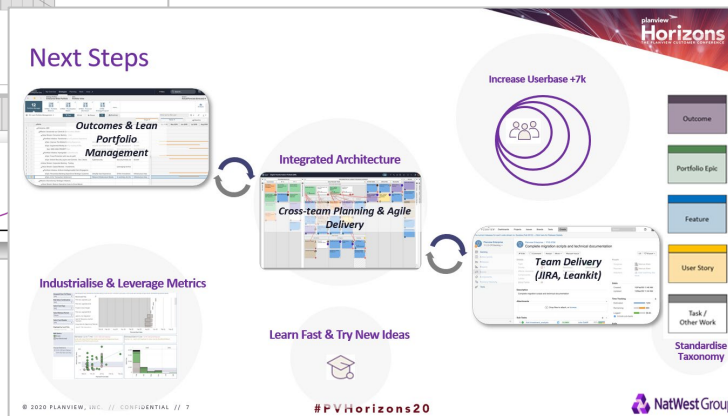
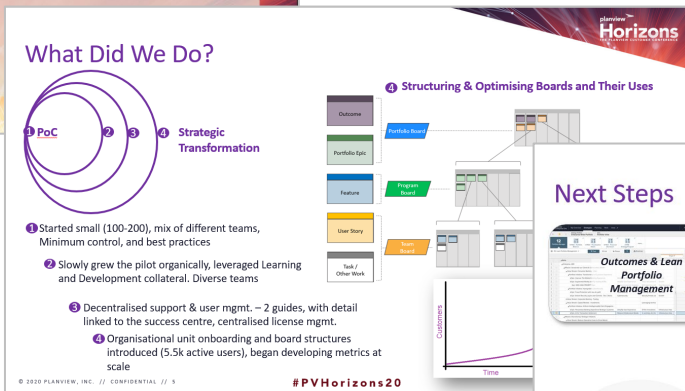


## What do we do

We support:

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

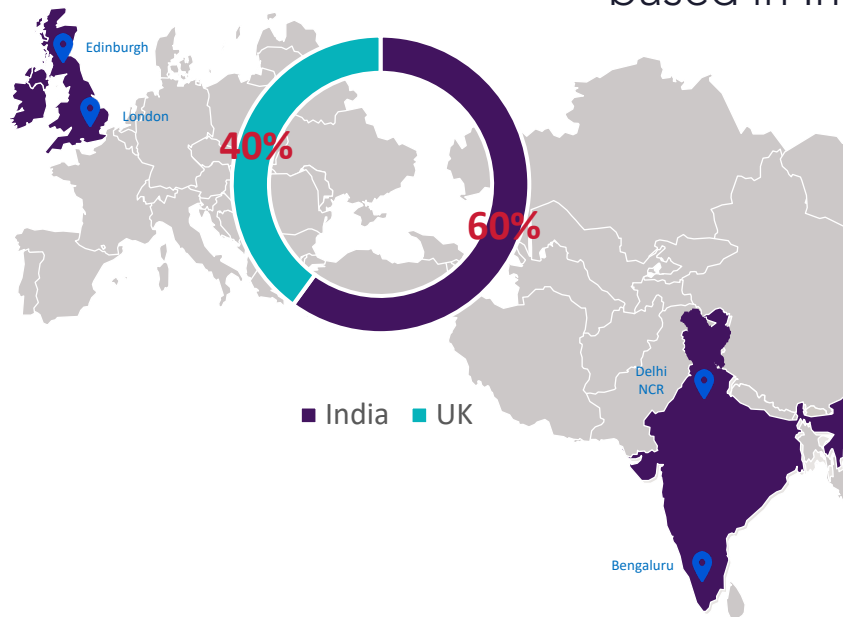
# Our Journey So Far





# Where Are We Now

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



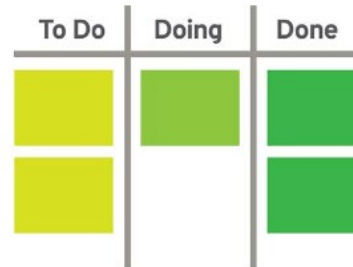
The increase of our user base over the last 2 years was in the backdrop of the Covid Pandemic.

Did this help or hinder us becoming more agile?

# Generalised Characteristics for Approaches



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



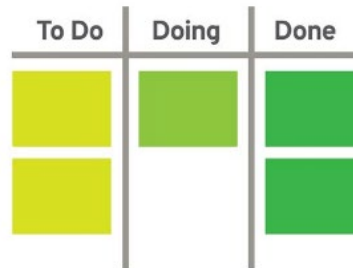
- Plan
- Execute
- Review
- Retro

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

# Generalised UX for Approaches



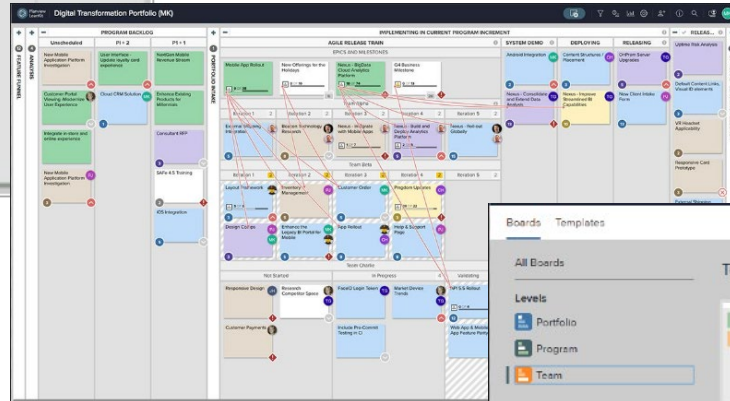
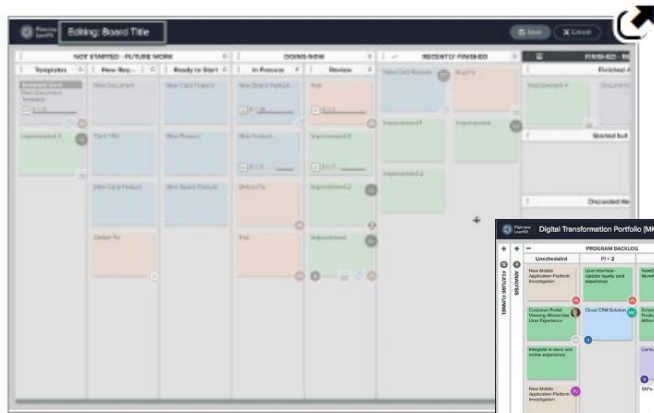
- Capacity drain on your time / productivity
- You have limited input /influence on delivery style and
- Siloed working through task assignment



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



# Level 1 Visibility

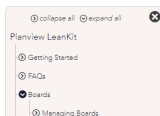


## 1. Visibility

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

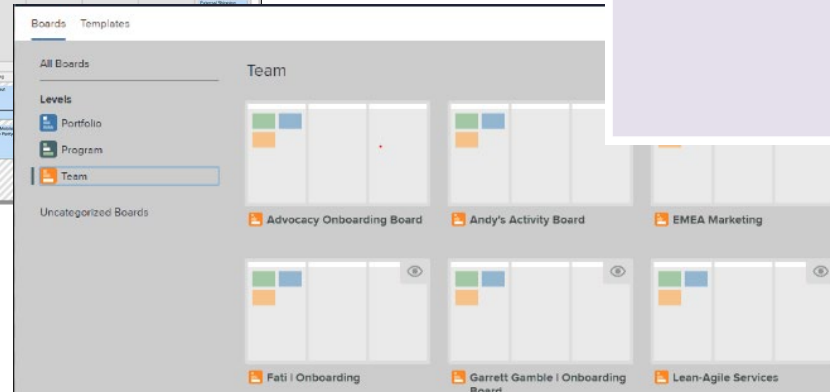
### UNDERSTANDING BOARDS

## How to Conduct a Board Review

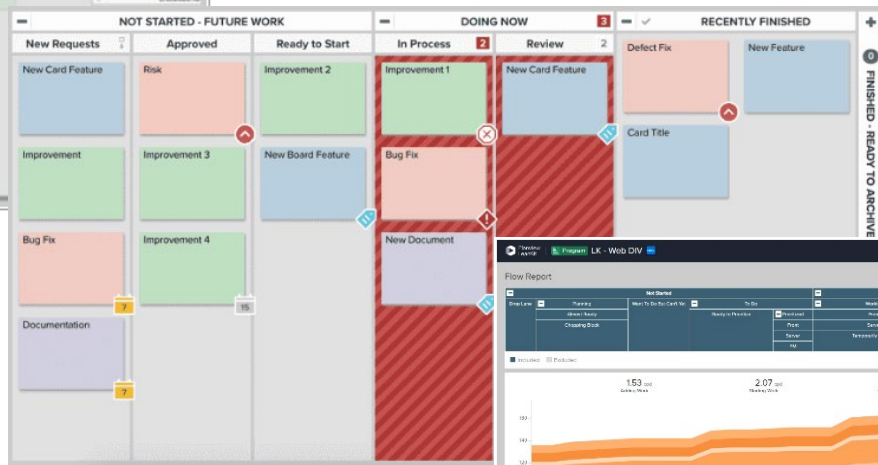
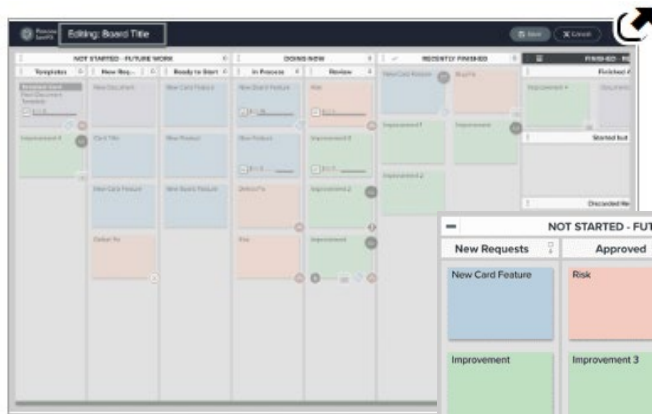


The main goal of Kanban is to make issues rise to the surface. Visualizing our work via LeanKit's Kanban boards gives us a way to better see and manage the flow of that work as it moves through our process. We then use work-in-process limits and the concept of a pull system to constrain how much work 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 (Blocking, in Progress, Done) in the work flow
- Early learning and continuous delivery



# Level 3 Measurement

Details

Title

Description

Use "gJane\_Smith" to notify a teammate.

B

I

U

11pt

Assigned Users

No Assigned User

Planned Start

DD/MM/YYYY

Planned Finish

DD/MM/YYYY

Header

Auto-increment

Priority

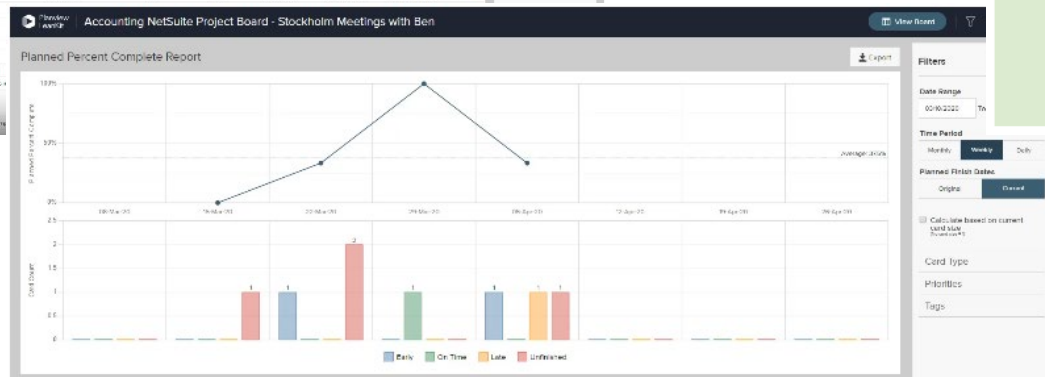
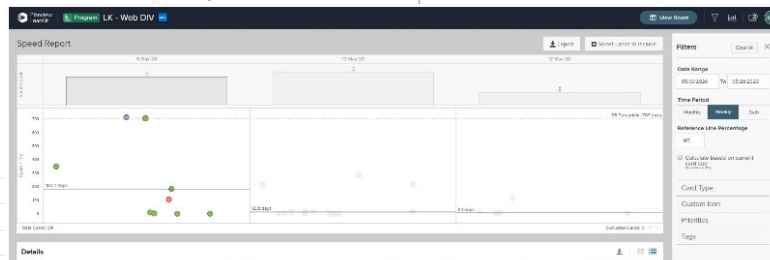
Card Type

User Story

Tags

Save & Close

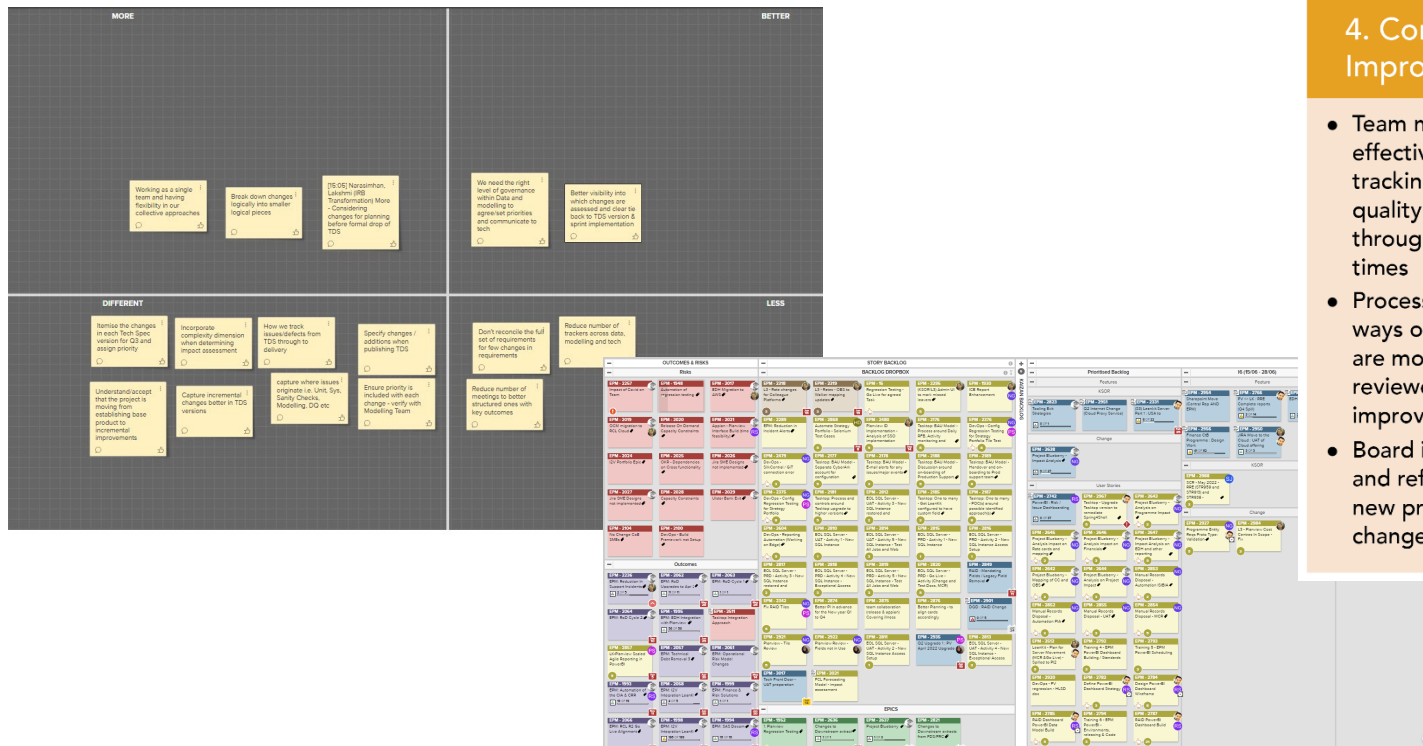
Cancel



## 3. Measurement

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

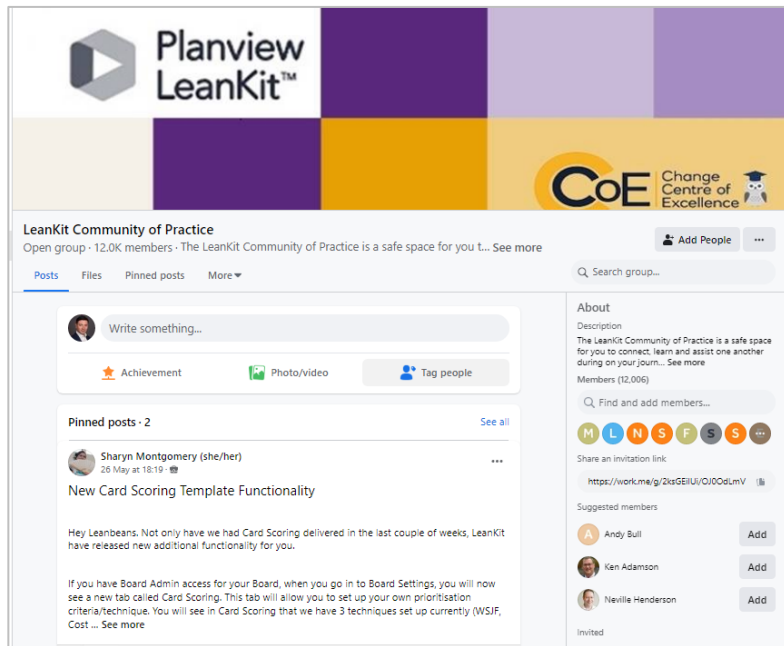
# Level 4 Continuous Improvement



## 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

## Planview LeanKit Maturity Model



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### 5. Objectives + Key Results

- Use Objectives and Key Results (OKRs) to align strategy with execution
- Visualise OKRs across teams
- Track progress towards Enterprise and Domain goals



MATURITY



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# Thank You!

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