

CASE STUDY

Global Financial Services Client Banks on Agile PPM

Background

The client is a global investment banking firm with more than 200 years of dedicated customer service managing more than half a trillion dollars in assets across 5 continents. The company prides itself on responsible investment of their stakeholders' assets with a commitment to delivering the best outcomes through sustainable management.



The Challenge

With a team of more than 5,000 employees spread across 32 countries on five continents, the client found it difficult to maintain the level of comprehensive global reporting required to maintain strict delivery standards and exceptional customer service. Multiple projects and workflows were confined to a single portfolio, which hampered visibility and stymied the management of the company's massive resources. Additionally, there was no ideal, foundational platform upon which the company could begin to develop and implement the Scaled Agile Framework necessary for high-level performance and expanded operations.

The Journey

The client sought a new vendor who could provide them with a project and portfolio management tool that would increase visibility, re-organize their existing projects across management disciplines and create a powerful foundation for a new, scaled Agile methodology. After researching a variety of vendors, the client decided to partner with KeyedIn. The driving factors in this selection included:

- KeyedIn's single unified platform for project and portfolio management and ability to integration with complementary systems. Project execution occurs in Jira and TFS, with all approvals, work, financial tracking and high-visibility reporting in KeyedIn
- The solution's ability to control visibility and auditing across the portfolio, independent of methodology
- The Agile Portfolio Management approach that enabled the team to transition key elements of the company's operations to SAFe



The KeyedIn team met with the client to determine what capabilities would be required to support their unique requirements. Due to the organization's broad global footprint, special care was necessary to ensure that the new solution would meet their current needs and allow them room for growth as they developed their processes. Additionally, both KeyedIn and the client wanted to establish an onboarding process that would streamline implementation across teams in every country and allow for configuration to avoid disruptions to existing processes that were working. This process included:

- Meetings with implementation consultants to support the success of the process
- Requirement and configuration workshops to prepare for implementation
- Customized configuration
- User testing
- Continuous support
- Training
- Detailed manuals and materials

The Results

After a careful onboarding process, the client enjoyed a variety of new benefits that made it easier to report across multiple reporting lines including financial governance, resource management and project execution. All projects, tasks and deliverables are now accessible from a single source, increasing visibility and overall control, no matter where the software is being used — any region, any time, any methodology. Other benefits include:

- Enhanced dashboard that standardizes reporting
- Easy allocation of teams and resources
- Increased access to information across teams and departments
- Improved engagement with stakeholders and key decision-makers
- Enhanced communication across teams worldwide
- Advanced tracking at a global level
- Accurate time tracking anytime, anywhere in the world
- Improved resource management and capacity planning
- Scenario planning
- Advanced forecasting
- Better budgeting

According to the Head of the PMO, “The whole team was very happy with the way the implementation turned out. We love to meet our objectives in helping our clients achieve their PPM objectives, especially when they support important company objectives.”

About Keyedin™

At Keyedin, our mission is to make our customers more successful by empowering them to place the right bets, turn quickly and deliver faster. As a leader in Agile Portfolio Management, Keyedin offers a suite of SaaS solutions that support business transformation, strategy realization and organizational change. The company's award-winning products go beyond simple project management to encompass portfolio analysis, scenario modeling, capacity planning, product management, strategic resource management and more – supporting the evolving needs of PMOs, ePMOs and SROs. Join the hundreds of customers that have partnered with Keyedin, including Walgreens Boots Alliance, Universal Electronics and Office Depot. Learn more by visiting www.keyedin.com.

For more information, visit www.keyedin.com



Copyright © 2020 Keyedin Solutions. All rights reserved.

Corporate Headquarters

8500 Normandale Lake Blvd
Suite 400
Bloomington, MN 55437, USA
p +1 866 662 6820

EMEA Headquarters

Maple House
Woodland Park
West Yorkshire, BD19 6BW, UK
p +44 (0)1274 863300

www.keyedin.com