



PORTFOLIO AND BUSINESS IMPROVEMENT

Established a structured approach to portfolio and project management, enabling the justification, development, and deployment of capable resource to deliver profitable growth.

The Client:

Customer communications division in a global financial services business, with a turnover of £250 Million.

The Challenge:

The client was struggling to implement a growing portfolio of work. Limited resources were available to provide service to the core business while improving processes and keeping systems up to date. Improvement projects were not being completed, due to a lack of prioritisation and focus between functional members of the leadership team.

Our Approach:

Our review identified the need for a basic portfolio management solution with supporting infrastructure. We implemented a portfolio management capability, a gated approval process and

resource forecasting. This was achieved using a combination of SharePoint and Excel tools designed specifically for the organisation. We went on to develop and deliver a package of training for all project managers, closely aligned the Association of Project Management Body of Knowledge.

We then advised that a more structured approach was required for improvement management, introducing LEAN 6 Sigma thinking, and establishing a weekly planning process. This enabled the leadership team to review progress through the DMAIC (Define, Measure, Analyse, Implement, Control) phases. Support was provided to the management team through all phases of the improvement lifecycle ensuring buy-in and success. An audit programme was also established to confirm



that improvements were real and benefits were being achieved.

An additional 50% more developers were recruited to deliver the increased workload, improve service, and increase contribution to the bottom line. The business now has a robust approach to approving and progressing all project based work.

Written by Mike Coveney



Outcomes:

- ▲ Resources justified to meet forecast load.
- ▲ Systems updated and resource assigned to future upgrade programmes.
- ▲ Projects understood by the leadership team with necessary effort co-ordinated across the business.
- ▲ Programme of process control risk assessments established.
- ▲ Improvement projects prioritised and managed through to completion.
- ▲ Improved understanding and mitigation of all risks.
- ▲ Technical debt visible and in control.
- ▲ Leadership team able to flex capability to meet demands from COVID.