



Custom Software Solutions for **Benefits Management**

LEADING AGILE TRANSFORMATION ON A NEW EMPLOYEE BENEFITS PORTAL

THE CLIENT:

A global consulting leader in retirement benefits and investments whose clients include employers, institutional investors, and non-profits in over 130 countries. Their consultants deliver what each client needs to meet the client's pension portfolio and retirement program objectives. Their broad range of advisory and administrative services include offerings such as strategies and tools for retirement plan designs, asset allocation, and administration. As a research and technology leader, this company also provides comprehensive analysis tools, information, and platforms that are used world-wide for managing portfolios and pension risks.

THE BUSINESS NEED:

This company continuously enhances the platforms used by their consultants, advisors, clients, and client's employees to address their investment and retirement plan needs. Delivering on a world-wide scale means creating solutions that are flexible to meet in-country regulations and client specific outcomes while at the same time providing visibility and risk management at an enterprise level and across the client's diverse pension investment portfolios.

To address market, security, and governance changes of clients in the European market, the client envisioned a new pension portal. It was designed to attract new clients and surpass competitive offerings in the market. It would also enable the company to sunset a 10-year-old legacy application that was costly to maintain and difficult to enhance due to the complexity of the client customizations.

The company assembled a delivery program comprised of 7 agile teams. The teams were created from internal departments and external 3rd party specialist firms. The new pension portal was cloud-based and built on a MEAN stack, incorporating the latest technologies. A team of business stakeholders was identified to participate in the project. The business team was very comfortable working in a waterfall delivery program and had not participated on an agile team. They had concerns about the ability for the agile program to deliver what they wanted in budget and on time.

WHAT GENECA DID:

This company had looked to Geneca many times during our longstanding partner relationship to help them lead their complex, multi-workstream, agile programs because of the positive results we deliver together. We also had built a track record of success in leading and guiding business teams who are comfortable with waterfall delivery (and who may be

resistant to change) to become effective participants on agile teams. Once again, this company asked for our help to provide a versatile leader with both technical project management capabilities to manage development workstreams and the business acumen (both financial and operational) to lead stakeholders through the transition to a new way to work.

The first 2 months of the 14-month project had elapsed when Geneca joined the project. Team members logged a lot of time on the project, but there was no visibility to dependencies across workstreams. There was also a lack of understanding and definition for what constituted 'done' when it came to completed work between teams. There was not a common understanding of what it would take to hit set milestones, so progress was measured as 'Time elapsed' equaled 'Percent complete'.

Over the course of the roughly year-long project, Geneca implemented program changes for the delivery teams to uncover cross team dependencies and ownership for resolution. We brought some much-needed focus and created an elastic project completion approach where none existed at the outset. This helped the team pivot when challenging obstacles arose such as re-direction from the parent company, resource challenges of 3rd party firms, or an unexpected, extended absence of a key member of the team.

We also used several techniques to enable the business team to learn a new way to work. By the end of the project, the business team learned that through their participation and awareness of the cost implications of the decisions made along the way, they could actually control budget and timeline better than they had experienced in the past with their waterfall projects.

THE RESULTS:

We supported the company's leadership objectives and ultimately completed the project on-time and under budget.

The business team learned how to participate effectively as part of an agile delivery team and dispelled some misunderstandings. They learned that:

- Breaking the project into smaller capabilities provided better control of scope
- Story estimates provide budget control and bigger wins for investment
- Business team visibility and dependency gave them improved control over timeline
- Story session agendas allowed the business to manage their time and make decisions faster

The company will also be able to reduce their application maintenance cost by an estimated 50% when comparing the new portal to the legacy platform.

- Cloud-based platform, updated architecture, and MEAN stack allows for easier, faster implementation of highly specific capabilities and requirements.
- Development teams gained velocity and provided support for assumptions made about on-going maintenance costs

We created an approach for reconciling agile development principals with program governance needs. These objectives were initially at odds with one another.

- Provided a common approach for several agile teams coming from different companies to deliver together
- Defined 'accountability' and 'completed work' so project leadership could meet the company's governance objectives
- Created program inventory and delivery plan to enable visibility need to meet governance requirements.
- Gave agile delivery teams necessary tools to manage their work using their agile techniques

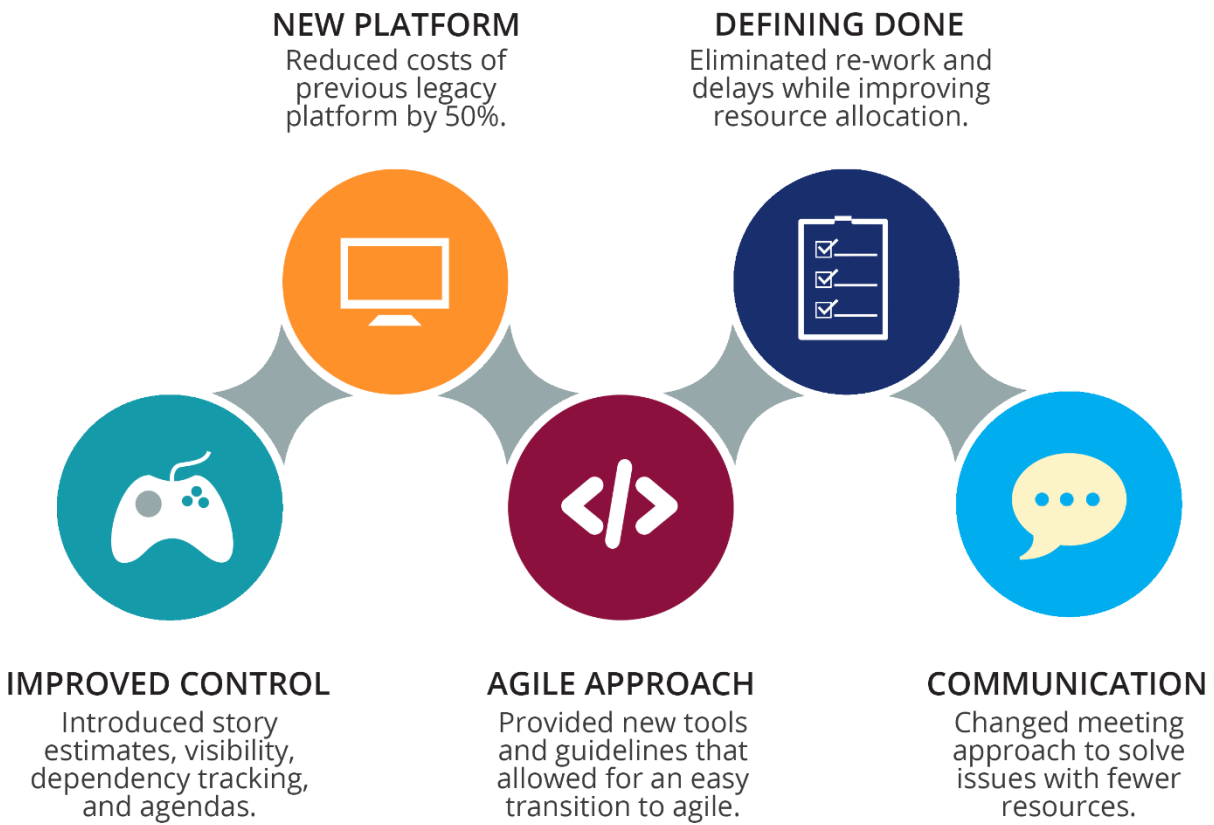
By defining 'done' at the task level within stories, we eliminated re-work, delays, and duplicate work and also improved resource allocation.

- Helped the team create a [shared language](#) to reduce friction and smooth user story handoffs
- Stopped duplicate hour charges by teams for work on the same project activities

- Complete cache of unfinished user stories existing when we joined the project
- Taught teams agree on delivery items for each team to collectively complete user stories

We improved cross team communication and make better use of meeting times, turning them from status focused to working sessions.'

- Shifted meeting focus to identification and ownership of cross team dependencies
- Changed meeting approach to reduce the number of staff involved and dedicate a team lead to schedule time as needed for a resolution
- Saved team members time and the client money with the enhanced ability to resolve issues with fewer resources



Let's Talk!

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