Industry: Consumer Finance

Services Provided: PMO Team Development, Program Management, Project Scheduling, Business Process Improvement, Methodology Enhancement, Measurement and Metrics, Mentoring / Coaching, Agile Techniques, Workflow Monitoring and Management

Company: A consumer finance company with locations across North America

Challenge: Changing state and federal regulatory compliance challenges caused this company to reinvent its custom-built storefront and home office systems. The IT and PMO teams were geared more for operational maintenance rather than for the complexities of developing new systems. This resulted in an overwhelming workload and schedule overrun measured in years. Project personnel had suffered through turnover of staff and technologies, requiring numerous restarts and integration challenges. Even basic business requirements needed to be re-initiated. Little progress other than some “wire frame” models and discarded technologies had been realized.

Solution: The company reached out to PM Solutions for a senior-level program manager to take charge of the situation. He recommended a “back to basics” approach, including a full project review and the establishment of stakeholder ownership and project governance. Business requirements were then developed to guide the team in the work necessary to succeed. Gradually introducing agile techniques permitted a quick restart, with a series of sprints to develop “proof of concept” components of the system.

The company already had Atlassian’s JIRA system for operational maintenance, and PM Solutions expanded JIRA’s use by creating workflows and tools to apply

$ VALUE DELIVERED
A years-overdue project was brought to Operational Pilot, saving millions in development time. By applying agile techniques the throughput of task completions over time improved by 400%, while rejection rates of work submitted for QA testing dropped from 30% to 5% over six months.

Agile Tools and Methods
- Scrum meetings
- Small team leadership
- Sprint planning sessions with BA, QA, and business owner inputs
- Bimonthly sprints
- Information radiators using Atlassian’s JIRA
- Burndown progress charts
- Completion metrics
- Quality assurance metrics
- Kanban for process flow tracking
- Work in Progress (WIP) limits for improved time management
- Use of story formats for task naming
- Use of EPICs to sync with the work breakdown structure

PM Solutions is a project management consulting firm that helps PMO, project, and business leaders apply project and portfolio management practices to drive performance and operational efficiency. Comprehensive offerings include PMO transformation, project portfolio management process improvement, program and project management resources, and corporate training and competency development delivered through the training division, PM College.
the agile approach to a new development project. Embedding the PMO business analysts and quality assurance personnel with the developers helped to improve timeliness and success rates for delivered work.

To help pace the work, a Kanban approach was introduced; this also assisted project management in tracking deliveries and reporting progress to the stakeholders. Workload assignment overloads in a department tasked with supporting both new development and operational systems, threatened to derail the project; however, introducing work in progress (WIP) limits improved work throughput, and management effectiveness for the team.

The company next employed PM Solutions to develop a change management system that emphasized the early management review of requirements and authorizations prior to work being assigned. This reduced the overall workload for the IT Department and permitted company leadership to take part in priorities and resource utilization decisions, and focus on the “must haves” before the “nice to haves.” Transparency in the system reduced the impact of politics in getting tasks and projects prioritized in the information systems departments.

“PM Solutions was a tremendous help in getting us organized and focused. The implementation of agile methodology with a Kanban approach was great for getting our development team workload to a manageable level and thus improved our output. 

“Our PM Solutions’ consultant was professional and a great mentor and coach, introducing many new ideas to help the PMO.”

— PMO Manager