

CASE STUDY

BECU Drives Agile Adoption Beyond IT, Increasing Transparency Across the Organization

B|E|C|U

INDUSTRY:

Banking

GEOGRAPHIES:

Washington, South Carolina

EMPLOYEES:

2,000

PLANVIEW PRODUCT:



PLANVIEW SOLUTION:

**Work Management with
Planview® AgilePlace****CHALLENGE**

Boeing Employees Credit Union (BECU) was siloed and unable to effectively collaborate or share data to inform decisions because there was little visibility into work across teams and the organization. Each team was managing work manually in different ways with limited automation or remote access updates. While Agile principles were bringing benefits to the software development team, they were yet to be adopted by the rest of the organization.

SOLUTION

With recognition that Agile is not a tool but a mindset that drives decisions and how work is executed, BECU initiated a program to promote Agile across the organization. Planview® AgilePlace provides the foundation for Agile delivery, making all work visible in a single location to promote a greater focus on the customer, cross-team collaboration, and delivering value quickly.



“Planview AgilePlace is so easy to use, other departments are utilizing it in their own ways to manage work and projects. It’s highly flexible to meet their unique needs while still giving us an organizational view of what is happening across teams and departments”

– SHERI KELLER, AGILE COACH
AT BECU

ABOUT BECU

Founded in 1935 and based in Seattle, Boeing Employees Credit Union (BECU) is the fourth largest member-owned, not for profit cooperative in the U.S. The credit union has more than \$20 billion in assets, 1.1 million members, and over 2,000 employees across 50 locations in Washington and two locations in South Carolina.

CHALLENGE: EXPANDING AGILE PRINCIPLES ACROSS THE ORGANIZATION

In 2015, BECU's new CIO reorganized the IT division to include business solutions teams and equipped them with some Scrum training in an effort to make them more Agile. Unfortunately, they lacked the desired cross-team transparency for work in progress, and teams weren't able to effectively collaborate internally or with other teams. Teams were disconnected, using various methodologies and tools, physical Kanban boards, spreadsheets, or even Word documents to manage work, and they struggled to prioritize and manage constant unplanned work. With a desire to bring the Agile mindset to IT teams and the rest of the organization, an Agile Program team was formed to support the initiative. They were also asked to choose a tool that would bring stakeholders together to drive business value.

SOLUTION: LEVERAGING PLANVIEW AGILEPLACE AS AN AGILE ENABLER

The Agile team found Planview® AgilePlace to be the most powerful online system and introduced it first to a few IT teams who were asking for an electronic version of Kanban boards. Within three months, the 30 users were on board giving the Agile team justification for IT to purchase more licenses. Through word of mouth, AgilePlace has quickly gained popularity. BECU currently has nearly 400 licensed users and over 175 boards in use in less than one year, with only 50 percent of those users being in IT.

"We discovered AgilePlace was the enabler to extend the Agile mindset beyond the IT department, helping teams who benefit from using Kanban boards," says Sheri Keller, Agile coach at BECU. "It's so easy to use, other departments are utilizing it in their own ways to manage work and projects. It's highly flexible to meet their unique needs while still giving us an organizational view of what is happening across teams and departments. We never had this capability before. Business leaders and executives now have a visual to take into meetings and use to drive conversations and build confidence around decisions."

BECU's Community Service team uses AgilePlace to manage large events in real-time, eliminating the time

and effort used in manually creating hundreds of work items on laminated cards for a physical board. Now, they have all their work in one place, making it easy to see progress and timelines. Finance, too, replaced manual boards with AgilePlace. With all work visible on Parent and individual Team boards, everyone can easily collaborate and coordinate larger initiatives. Rich metrics provide the Director with the needed insight to understand costs and work, fostering more productive meetings.

HR let go of manual spreadsheets that provided little visibility across teams in favor of AgilePlace. Today, they have a Roadmap board that tracks projects and ongoing efforts, and a Task board that shows work associated with the roadmap items. All of the work is in one place, facilitating capacity planning. "In HR, we were using word processor software to capture work, spending more time fighting the technology during presentations than informing," says Janette Brace, Agile coach at BECU. "Now, we have sophisticated presentations and visual reports that engage people and spark effective conversations."

RESULTS: ORGANIZATIONAL VISIBILITY INTO WORK AND DATA THAT DRIVES DECISIONS

AgilePlace is helping drive the organizational adoption of the Agile mindset, giving multiple departments at BECU instant, real-time access to work status no matter people's physical location. Morale is higher, conversations are richer, and there is greater trust between teams. With work more transparent and visible, teams not only have a better understanding of how their work impacts others, but they are also able to prioritize work delivery and use metrics to drive continuous improvement. "Agile is a journey, but what's great about having AgilePlace is people can finally see value in what we are asking them to do," says Brace. "When everybody is engaged, they don't wonder why they're doing something. They can see how their efforts roll up into achieving overall organizational goals."

FUTURE: LAYING THE FOUNDATION FOR DEVOPS TRANSITION

As BECU transitions to DevOps, AgilePlace will be part of the toolchain used for integration as they start to build value chains. Given the flexibility of AgilePlace, Keller expects more teams across the organization will leverage it in their own ways as they become more Agile and drive continuous improvement opportunities. No matter how they choose to design their digital boards, they will be able to see work across their teams, as well as other teams in the organization, bringing a cohesiveness as they work towards a common vision.

See what Planview solutions can do for your organization. View demos on demand at [Planview.com/demos](https://planview.com/demos).

