

ENTERPRISE FINANCIAL SERVICES TEAM USES PLANVIEW LEANKIT TO INCREASE AGILITY AND ADAPTABILITY

“We don’t have to chase each other down to know what to do, since the Planview LeanKit boards communicate so much of what we need to know.”

IMPROVING COLLABORATION AND PRODUCTIVITY

Before Planview LeanKit®, a compliance team at one of the nation’s leading financial services companies used spreadsheets and other documentation to plan and track their work. They had little insight across the group’s status, progress, and priorities, which often caused last-minute scrambles to pull together the data. By adopting LeanKit, the team gained a shared, real-time view of their work, helping to increase their collaboration and productivity. Using LeanKit has also enabled them to evolve to a Lean-Agile way of working that they’ve termed an “adaptive workforce.”

The team realized these benefits within their first three months of using LeanKit:

- » **IMPROVED COLLABORATION** | The team has gained collective awareness of their work, which has contributed to greater collegiality, cross-training, and knowledge sharing.
- » **EFFICIENCY GAINS** | The team’s weekly delivery meetings run better, and they have decreased their reliance on emails and meetings.
- » **GREATER AGILITY** | The team has the capability to better forecast strategic initiatives and more quickly identify and adapt to changing priorities.

A SUCCESS STORY PRESENTED BY



From the Customer

OVERALL, HOW HAS USING LEANKIT HELPED YOUR TEAM? With a quick glance at our LeanKit boards, we can tell if we're on track to reach our monthly goals, and which cards (i.e., work items) need attention. We can also determine the cards that won't be delivered this month and will return to the backlog, which helps us be more agile.

HOW DOES YOUR TEAM USE LEANKIT TO ESCALATE CRITICAL INFORMATION? We use a LeanKit feature called "card tags" to spotlight issues with major deliverables. The tags are just one of the many card attributes that we can compile into a customized report that shows a three-month view of work we completed last month, what we're working on this month, and what's ahead for next month.

HOW ARE YOU USING LEANKIT TO PLAN AND FORECAST YOUR INITIATIVES? Using a delivery board and a roadmap board together allows us to forecast how much time we think we need to complete a task or project. We do this by using the card size field to show the number of hours we estimate that the work will take to complete.

HOW HAS USING LEANKIT EVOLVED HOW YOU WORK AS A TEAM? Adopting LeanKit has had a very positive domino effect on our team. After we started using the tool to plan and track our work, we noticed we could also use LeanKit to drive our Lean-Agile transformation. Within three months, we were able to radically evolve our way of working, by making a shift from silos to becoming an adaptive workforce. I don't think we could have made that much progress in such a short time without LeanKit.

WHAT ADDITIONAL BENEFITS HAS YOUR TEAM EXPERIENCED? From a collaboration perspective, it's been huge. When we gather for our weekly delivery meetings, our team is much more vocal now. We're volunteering to lead or work on projects, sharing any challenges we've run into, and are actively engaged in discussions. The ability to reference our LeanKit boards helps make these conversations happen.

TOP REASONS FOR CHOOSING PLANVIEW LEANKIT

- » Excellent visual components
- » Highly flexible board layout
- » Quick to learn and easy to use



Ready to see Planview LeanKit® in action? Watch a product overview or register for a live demo.

[Planview.com/Products/LeanKit](https://planview.com/Products/LeanKit)