

NatWest Finds their Key to Agile Transformation



Industry:
Financial Services

Geographies:
United Kingdom

Employees:
62,000

Planview Solution:
Planview Enterprise Agile Planning

Planview Product:



CHALLENGE

Being no strangers to change, NatWest – like the 19 million customers they serve – found themselves on the cusp of unprecedented digital and economic disruption. Against a backdrop of emerging technology, changing populations, and a highly uncertain economic (and governmental) environment, this leading UK-based banking and financial services company decided it was time to simplify their business and further invest in tools to drive efficiency. That meant implementing Lean and Agile more broadly across their large, complex, and geographically distributed organization.

SOLUTION

NatWest didn't know what to expect or to what extent their adoption of the Planview Enterprise Agile Planning solution would help them on their "New Ways of Working" journey, but they quickly discovered it would become a significant catalyst in driving adoption and managing Agile at scale throughout the organization. Complimentary to NatWest's Agile mindset and culture, Planview LeanKit™ made change easy, and has proven to be a key component in their journey to transformation.

"We are using the Planview LeanKit to scale Agile across our organization. LeanKit makes it easy for change to happen, and that's a permanent and sustainable change."

– Paul Hickman, Senior Business Analyst

About NatWest Group

Today's NatWest Group (formerly Royal Bank of Scotland) and its brands are comprised of hundreds of past financial institutions, some dating back over 300 years. Headquartered in the United Kingdom and powered by innovation and partnerships, the group provides a wide range of products and services to personal, commercial, large corporate, and institutional customers.

Challenge: The Journey to Transformation

You don't survive centuries of mergers, acquisitions, and rebrands without knowing a little something about how to evolve as an organization. NatWest Group is no stranger to change.

As with any organization, they need to continue to adapt to their ever-changing environment and execute the right changes at the right time. To help with the journey, they began implementing more Agile approaches and adopting Lean principles to manage and deliver their work. They call it their "New Ways of Working" initiative and Kanban is a fundamental component.

In the NatWest environment, there are over 4,000 projects delivering into more than 400 multiyear programs, each one directly aligned to their strategic initiatives. As more teams adopted Kanban, they had physical whiteboards popping up all around the office and, of course, Post-It Notes everywhere. Despite a plethora of tools available within their environment to help with the "New Ways of Working" there was no proven, consistent, dominant tool to help across the entire organization.

"We had a lot of plans while operating in a hybrid portfolio where we had Agile and waterfall, and everything in-between. Both planning and reconciling the work was sometimes very different and very difficult," says Kevin Meddeman, EPM Transformation Manager – leading the team responsible for change technology across NatWest.

There were a lot of positives in place inside the organization that they didn't want to impede or disrupt with the inclusion of a new tool. However, with an increasing need to pivot, scale, and mobilize quickly in response to industry demands, they knew they had to resolve the challenges of working in geographically distributed teams. They understood this was especially true when trying to work in Agile and Kanban fashions.

Solution: Adoption of Agile Fueled by LeanKit

NatWest decided to leverage its existing relationship with Planview to see how further adoption of the Planview Enterprise Agile Planning solution could help their organization embrace new ways of working and drive Agile transformation. They elected to run a Proof-of-Concept (POC) with Planview LeanKit, the Agile Program Management and cloud-based visual work delivery module that is part of the Planview Enterprise Agile Planning solution to help empower their teams to apply Lean and Agile principles and processes.

Kevin and Paul Hickman – Senior Business Analyst within NatWest's Change Center of Excellence – opted to allow teams

to adopt LeanKit as they saw fit. They didn't create any barriers to adoption and didn't provide teams with any predefined use cases. Realizing that understanding Lean-Agile principles was the starting point from which any adoption of LeanKit and journey to transformation would need to come from, NatWest implemented a train-the-trainer type model.

By focusing their training on uplifting early users into coaches, demand grew steadily, and LeanKit proved to be very popular with the initial base. Kevin and Paul continued to let growth be driven organically, and as the business started to see demonstrations, hear word-of-mouth, and see more teams sharing successful experiences, demand exploded. The benefits evidenced by the pilot and LeanKit's ability to visualize work across teams were all that was needed to push massive Agile growth.

Utilizing the Planview Success Center, NatWest developed best practices to get teams up to speed more quickly and migrate from their previous methodologies or work management systems. This allowed NatWest to onboard more diverse groups throughout the organization from finance to marketing, driving a broader reach and allowing NatWest to fully explore the capabilities of LeanKit as a key transformation enabler.

Senior leaders started tracking their departmental outcomes in LeanKit. Work through different business levels was linked using parent/child relationships with cards and boards. They were able to mature their capability around using metrics to drive continuous improvement. And some teams even used LeanKit to facilitate their virtual PI planning.

Results: A Flourishing, Collaborative Community

A journey that commenced in May 2018, with a small base of around 100 to 200 users participating in a POC, went all the way through to the LeanKit adoption into enterprise-wide production and resulted in the organization gaining a real understanding of Lean principles and Kanban. The LeanKit community at NatWest is now a flourishing, self-sustaining collaborative group with over 5,000 users.

"The overriding feedback, time and time again from the early adopters to our teams of teams now in departments, is that the flexibility of Planview LeanKit and its ease of use really did help with our adoption and fueled our overall growth," says Paul, whose team supports the framework for how change is delivered across NatWest Group.

"As a production application, we're able to propose it as a potential solution for an integrated architecture to manage Agile at scale in our organization."

Future: Permanent and Sustainable Change

NatWest looks to maintain momentum and continue growing the LeanKit user base to meet the demand they are seeing from the business and further their Agile journey.

To learn more about what Planview® solutions can do for your organization, visit [Planview.com](https://www.planview.com).

