



Case Study

Business Process Management Programme
European Investment Bank

Coaching To Deliver



1 The Challenge

Following a re-organisation in the Global Markets division of this major investment bank, a business process management program was moved into a strategic shared technology group. The program was initiated to provide a client operations event monitoring tool, with issue logging and tracking. The program was then extended, using the selected vendor, to provide exception management capability to a number of other business areas, with a vision that this could potentially become a group wide process management utility. The program had a history of problems, both with the bank teams and a third party software vendor, resulting in poor scope definition and repeated delays to deliveries to the business. Additionally, tensions between the group managing the program and technology teams that were implementing in other business areas were adding to the problem, contributing to a lack of cohesion in the program direction. The bank was of a hierarchical nature, deeply political and, hence, this did not encourage openness.

2 The Approach

This was split into an analysis period, to provide all team members and stakeholders with a common view of the true state of the program at handover. The following planning phase was done collaboratively to unite the teams, ensuring a common team vision existed and that there was clarity around scope and deliverables, while coaching the team to deliver.

2.1 Analysis

Initially three weeks was taken to analyse the program, during this period we focused on:

- The program team dynamics and the relationship with the vendor teams
- Vendor technology and their delivery capability
- The degree to which the vendor was working to previously agreed and documented statements of work
- The current project planning and management process

Given the "in-flight" nature of the program and imminent deliveries at inception of our involvement this had to be combined with on-going changes to working practices, to ensure the team moved from the frantic state in which they were working (and not delivering) to a more considered, delivery focused mode of operation. While analysing



we observed and then participated in a wide variety of meetings, met with team members individually and in groups. Participation and management developed from this as some of the working practices, including designing functionality with the vendor in an ad hoc fashion, often by email and conference call were evidently counterproductive.

The conclusion was that the program had been initiated in one business area with one type of functionality (event monitoring), which was the selected vendor's core strength, then extended to other areas to cover another set of functionality (exception management), which needed to be developed. A number of other issues around exacerbated the problems:

- Lack of clear governance (no steering committee, lack of overall program management)
- Subsequent inability of the business areas to agree and prioritize development of functionality
- Small vendor with lack of delivery management capability
- Significant discrepancies existed between vendor development and functionality agreed and documented
- Disparate teams, with lack of clear management increased inefficiencies
- Blame culture had developed following continual delays to deliveries
- Daily issues meetings with lack of ownership and timeframe or plan for resolution of issues

2.2 Planning and Execution

Initial steps were to co-locate the London team, previously located across a number of sites in London, to enable better face-to-face meetings. A number of workshops were held to:

- Agree roles and responsibilities and program governance within the team and with relevant stakeholders
- Work through the organisation and process of the program
- Coach the team through planning for a delivery, using an early delivery, which was schedule for a month after the re-organisation. This was planned, the business was provided with a new but realistic delivery date a month later, which was then met.
- Work through how the program issues log should be managed more effectively, ensuring there was ownership and a focus on resolution

We worked collaboratively with the team and the vendor to reconcile differences between documented functionality and that which had been developed and agree a way forward. In following these steps the aim was to restore the overall culture of the



program to the partnership that should exist between the vendor and the bank and eliminate the “us and them” environment, with all parties recognising the problems arising as “ours” to solve. Performance was improved over time by introducing one to one goal setting and subsequent coaching sessions. Team planning around deliverables and then regular get-togethers to reflect took place continually.

3 Insights

Over the course of our involvement there was a clear change from a fraught, disconnected business transformation initiative lacking clarity in governance, initially to a stabilised program working in a structured way and then through coaching to a cohesive unit with a clear sense of ownership among all team members. The environment was particularly challenging, given the hierarchical nature and the lack of ownership of deliverables common to other projects we were delivering into. This led to some obvious contrasts and also to a significant problem on our departure. The team became both cohesive and highly productive, however, the change in behaviour was not congruent with that of other project teams in the organisation and for long lasting change of this type a support infrastructure clearly needs to be in place.