

Driving Transformation at CAPITAL Services



Enhanced Team /
Business
Collaboration



Initiated
Transformation
Roadmap



Common Product
Language for an
Agile Enterprise

ABOUT CAPITAL SERVICES

CAPITAL Services is an innovative credit card portfolio management and servicing company providing portfolio analytics, financial modeling, compliance, technology and servicing for their clients. Focused on generating sustainable financial strength, they are a family-owned business that was started in 1998.

▶ BUSINESS CHALLENGES

CAPITAL Services had gone through agile training and workshops as a company the year before. They had seen some initial success, and wanted to extend that further. Their leadership team identified areas that they wanted to improve on during the assessment.

- **Collaboration challenges:** Some confusion still remained around roles/responsibilities as well as project vs. product alignment between technology and the business, impacting collaboration
- **Unpredictable, delayed delivery:** Limited capacity planning increased work-in-process (WIP), also impacting predictability.
- **Competing priorities:** Without a shared language and understanding surrounding value flow, individuals within and across teams were not able to optimize the flow of value to the business.

AT A GLANCE



Business Challenges

- Issues with Collaboration and Dependencies
- Unpredictable, Delayed Delivery
- Competing Priorities Across Teams and Managers



agilityIRL Approach

- Proposed a company-wide retrospective
- Conducted a structured agile assessment at all levels
- Used both qualitative and quantitative analytics
- Facilitated alignment on results



Results

- A clear picture of where the transformation stood
- A set of improvement actions team-by-team, and across teams and organization
- Project-to-product plan to improve business and development alignment
- Establishment of transformation roadmap, backlog and governance

“We started our agile journey a year ago with basic Scrum training, and wanted to take our productivity to the next level. Through their assessment and coaching, agilityIRL helped us identify the needed improvements and the path to scale the impact up and across the organization, which is already starting to show results.”

Troy Larson, CTO



THE APPROACH

Initiate data-gathering through online surveys

Facilitate alignment around the collected survey responses through on-site workshops

Coach leadership on how to further evolve an agile transformation

Get to work!
Training and Coaching to support the teams through change

Interview

Collect qualitative data to complement the surveys

Analyze results through the lens of decades of lean-agile experience

Recommend changes and experiments for a transformation backlog

THE RESULTS

With agilityILR, CAPITAL Services' team developed a **shared understanding** that the current team alignment does not completely optimize delivery. A **reconfiguration** of teams and planning process that **reduces dependencies, improves collaboration**, and enhances the speed of delivery and thus **the flow of value to the customers** was suggested. Guidance was offered about a move from a project model to a product model that created better alignment with the business. Through facilitated workshops, CAPITAL Services formalized **clear business priorities** that further aligns the organization across all levels of leadership and functions.



KEY BUSINESS OUTCOMES

- **Team reconfiguration:** Helped develop a team configuration that aligns better with the value-delivery structure of CAPITAL Services
- **Implementation guide:** Identified and formalized a transformation leadership team and developed a backlog for continued transformation
- **Becoming an agile enterprise:** Aligned leadership at all levels around ownership of agile transformation direction and implementation

WHY AGILITYIRL?

- **Agile Experts with Practical Experience:** Our ability to apply agile principles in a real-world environment, drawing on our background as agile practitioners was critical to support our client's agile evolution.
- **Customized Solutions:** Offering a diverse range of certified and customizable training and coaching options, we customize the engagement according to the company's unique needs and organizational culture, helping to select the best approach for your company.
- **Measurable Success:** We provide metrics and tools for your company to measure your progress as you implement solutions.

HOW MAY WE HELP YOU?

 Info@agilityirl.com