

The background of the top section features a dark, textured map with a compass rose. A large, detailed compass is overlaid on the right side, showing cardinal directions (N, S, E, W) and degree markings. The compass needle points towards the top of the frame.

It's all in the
planning

Mission Critical Programme for Global Bank Saved From Failure

"I write to congratulate you on the successful system conversion. Please pass my thanks to our colleagues who have worked very long hours over many weeks to get this over the line.

A great outcome with credit to many; all of whom I thank. Well done."

Group Chief Executive

Summary

The Group CIO of a large multi-national bank asked Xceed Group to provide guidance and direction on a major migration and transformation programme within one of its Core Global Business Divisions, the Private Bank.

After having missed previous implementation dates, the Xceed Group team joined and both initial European sites went live on the revised implementation date.



Typical complex implementation involving several business critical go, no go decisions.

Progress will be tracked and displayed in real-time (as shown above) during the event.

"It is great to see such positive launch and associated recognition from the Management team. We had lots of help from many outstanding people, but a special thank you to this team. Congratulations and Thank you. It is a pleasure to be associate with such a group!"

Group COO

The Customer

One of the world's largest banking and financial services organisations serving millions of customers through different global businesses. The customer was undergoing a global platform replacement throughout one of their key business functions.

The Challenge

The bank had sought to implement globally a new third party software solution, replacing its old legacy technology to improve technical efficiency, improve process flexibility and make cost savings.

After the programme failed to meet several implementation dates, Xceed Group was brought in by the Group CIO to help get the programme back on track. This was a business critical programme for the bank and was being actively tracked by the Group CEO.

Key Objectives

- Detailed review of programme's status
- Recommendations on how to get programme back on track
- Manage a number of key remaining activities to meet overall objectives

The Project

The CIO requested guidance from Xceed Group to action a plan to deliver the failing programme. At the time of the engagement, the programme had slipped its implementation dates for the second time. Firstly, the Xceed Group team reviewed all elements of the plan to determine:

- Where the programme was in relation to timescales and status on key workstreams
- What activities were key to enable 'go live'
- Planned dates and any dependencies between tasks and milestones

Having received a combination of out-dated Excel and MSP plans from the bank and its suppliers, Xceed Group held a series of 'deep dive' sessions with workstream owners to determine the programme status.

As part of the review, Xceed Group identified the dependencies on the plan and mapped out a critical path. The Proceed Toolset was used to generate a visualisation of the current plan to provide stakeholders with a coherent picture of the programme landscape. The Toolset allowed the consultants to create a holistic view, which was invaluable in reporting the position with the bank executives.

The visualisation showed executives the scale of the remaining tasks of the programme and the risk areas involved. They could see the dependencies between the tasks and the critical path. This allowed them to reprioritise certain activities to reduce the overall delay.

Once this was realised, the Xceed Group team worked with all parties to develop a new Mid-Level Plan aimed at a more realistic later (but still challenging) date.

The Proceed Toolset

A bespoke proprietary tool to help design and closely track major programmes and implementation events. It provides a visual representation of plans and tracks reports to give a clear indication of progress towards and variance against plans.

The visualisations allow all parties to clearly understand where workflows occur and the dependencies between them. The plan is updated automatically to show progress during a specified reporting period.

“Xceed Group’s impact was key to the success to the Programme. Xceed Group proved to be very helpful and reliable, bringing solutions and being pro-active...and always drove to deliver excellent quality work at any time.”

Senior Management Consultant

Do you need assistance planning a business critical programme?

Get in touch for advice on how to plan, or re-plan your programme.

Email: info@xceedgroup.com >

In order to maintain the visual representation, a tracking sheet reported progress, variance of activities and milestones. Having a clear view of the programme status enabled senior executives to make informed and effective decisions on where to go and what to do next. In addition it established a clear list of milestones in a clear format for tracking.

These tools were used in the weekly leadership meetings to introduce much needed discipline and rigour, which is required on a programme of this size and complexity.

The Results

Once the new plan was in place, the programme was delivered on the revised implementation date. One of the key contributors to delivering the programme was the improved planning provided by Xceed Group. Without a clear plan, there was a lack of transparency and direction to meet and resolve the challenges the programme faced. The plan put in place by Xceed Group helped drive appropriate decisions to address these challenges and complete the programme.

The use of The Proceed Toolset was well received by the bank and the format used for visual representations and tracking was made very familiar to bank executives. This familiarity helped strengthen their confidence in the programme and dramatically improve the decision making process.

Having implemented some of the most complex banking integration and separation programmes, Xceed Group’s experience, plus the Proceed Toolset successfully emphasised and proved the importance of forming and maintaining an effective Programme Plan.

The programme struggled for nearly two years and missed two implementation dates before Xceed Group joined the team. Six months later, both sites went live. Xceed Group brought:

- Strategic refocusing of the project direction
- A revitalised organisation
- Improved project results described by the client as “nothing less than a turnaround”

Project Takeaway

It’s never too late to re-formulate your plan.

If stakeholders are losing strategic focus and errors are becoming more frequent and more fatal, it’s vital to review the programme and really manage the plan to get the programme back on track. A structured approach to planning a large scale programme, combined with a visual representation of the plan will enable stakeholders to make informed decisions, understand the key dependencies and identify obstacles that affect the critical path.