

One of the world's ten largest banks in the world chooses Triskell as a main PPM tool at corporate level

One of the world's ten largest banks in the world and top three in Europe, with around 138,000 employees and serving 52 million customers around the world, chose Triskell to be the main PPM tool at corporate level and to implement it in multiple departments of the company. Today, 4 company entities use Triskell: 3 in France and 1 in Portugal.

Overview

One of these entities is the IT partner of 39 regional banks. It has one unique IT system and is in charge of design, build and run the Bank Information System. In terms of key figures, it has a staff of 1,700 with 16 locations in France. In 2017, they managed around 600 development projects for 250,000 man-days – a total of 2,000 projects.

The IT partner was created in 2010 as a single entity from a merger of 5 regional Information Systems groups to support the 39 regional banks. The first main step was to build one UNIQUE Information System to replace the five systems. These 39 regional banks have now a unique Information System shared with the entire group.

There was a traditional on premise PPM solution used by the regional banks. A strategic plan was built quickly around this PPM solution that guided this IT Partner to do and manage initiatives with this tool in 2012. But this was not successful, especially for portfolio management. The system was bottom-up (the information goes from the operational to strategic level) and didn't provide visibility. Management was then unable to make decisions based on the consolidated data.

Challenges

In 2015, the IT Partner decided to create a Strategic Plan disconnected from the Operational plan. This was due to different reasons:

- They had to manage large volumes of data (250 000 man-days, around 2000 lines in the portfolio: development projects and run activities with about 2000 resources.
- They had an objective to have a consolidated and multi-year

Highlights

Business Challenge

Create a Strategic Plan disconnected from the Operational plan.

Increase visibility to link execution and capacity with budgets.

Flexible structure that allows management at different levels.

Solution

A multi-portfolio SaaS solution working as a unique repository with the ability to manage a large amount of data.

Results

Better governance at a strategic level.

Quick development and implementation.

Company Overview

Industry

Financial Services (Banking).

Type

Public, cooperative.

vision of project costs in a single, unique repository - this was important for the IT Partner.

- The current PPM solution was unable to manage easily strategic and operational data in the same instance.
- They also wanted to review management process of strategic plan and decided to implement a Rolling Operation Plan (ROP).

At the end of 2015, the IT partner launched a process to select a new tool at a strategic level to support the Rolling Operation Plan disconnected from operational tool.

The main criterion was the flexibility of the tool to fit the processes and not the opposite, this was the key point. Of course, some features were important like Demand management and Simulation / What-if scenarios.

Triskell was selected in January 2016 and deployed quickly (3 sprints in 6 months) and the final solution was ready for the 2017 Strategic Plan. They have developed an integration with the previous PPM solution to import main operational data like milestones in Triskell solution.

6 principles to guide the Strategic Plan

Some principles were defined for this project:

- Get out from the project annual vision with a repository of commitments that gives possibility to report on execution and keep capacity to do the link with budgets.
- Fully support the process in place for the Rolling Operation Plan to get periodic statement of the plan.
- Give sense or meaning to projects by using a standard breakdown of projects and resources on a unique timeframe.
- Empower the role of portfolio managers to provide a framework and tools to ensure better data quality.
- Start with a limited scope and features and then involve operational users to extend progressively the usage and the different topics.

Rolling Operational Plan process

Every quarter, there is a two-day meeting with all managers to define and enforce commitments.

Managers will have a clear view on ongoing projects and commitments taken – roll up data from operation view.

They will analyse new demands and prepare some scenarios based on resource and budget capacity. They will then be able to prioritize,

arbitrate and fix a new roadmap for the new rolling plan. With Triskell, they can automatically communicate new objectives to operational.

Triskell implementation in 2016

Triskell is used to manage demands and strategic plans. Operational Plan updates Strategic Plan for ongoing projects and projects to start short term. Demands are validated to be added in Strategic Plan. The heart of the system is the environment simulation which will allow to take decisions. They do simulation per business portfolios, they have about 10 portfolios of 200 lines

Results and Benefits in this instance

Firstly, there is a much better governance at a strategic level. They can really manage the rolling plan rather than observe how the projects are progressing. They have put in place high Level Steering and Management with two-day meetings every quarter. Decisions are really based on reliable situation, Triskell solution can provide KPIs on aggregated projects costs data (MD, Capex, Opex). They have also guaranteed their capacity to execute and commitments follow up are improved.

Secondly, the IT partner has been also able to standardize and industrialize their management and steering practises by sharing one unique company repository. The system is always available for all managers and they have also implemented a specific reporting on the strategic plan.

To conclude, we can say that the new system with one system based on Triskell to manage the strategic plan is efficient and under control. They were not able to manage and anticipate just by consolidating data from the operational system. In this case, it is mainly due to the huge number of data to manage.

Want to Learn More?

Request a personal Demo and discover how Triskell can help you to:

- Transform strategy into execution.
- Configure portfolios to support your business efficiently.
- Gain real-time visibility into portfolio performance.
- Manage projects, resources and budgets efficiently.

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