Lean Agile Portfolio & Program Management

Javier Ferrer
Head of Agile CoE

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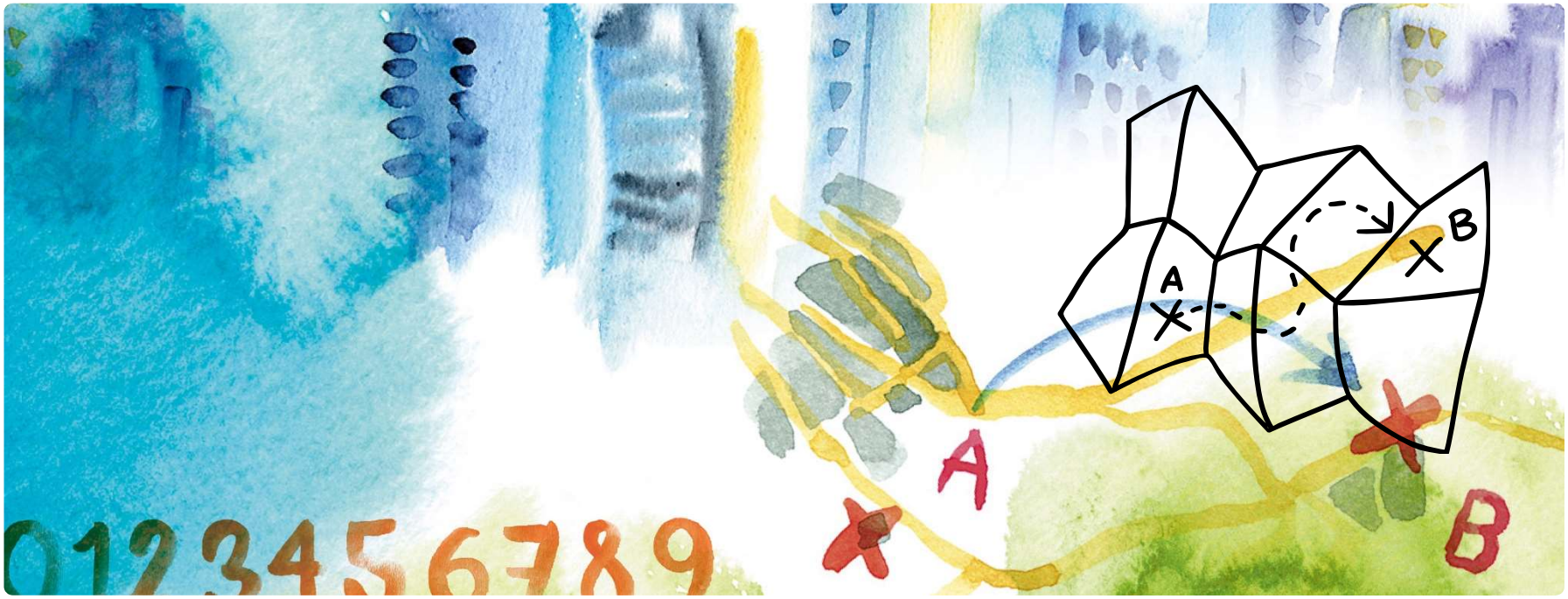
Nationale-Nederlanden



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NN Group

1845

De Nederlanden van 1845

1863

Nationale Levensverzekering-Bank

1963

Creation of Nationale-Nederlanden

1978

Creation of Nationale-Nederlanden in Spain

1991

Creation of ING Group

ING DIRECT

1999

Creation of ING Direct

NN

2013

Creation of NN Group

2014

NN Group listed at Euronext Amsterdam

nationale nederlanden

2015

Rebranding: in Spain Nationale-Nederlanden

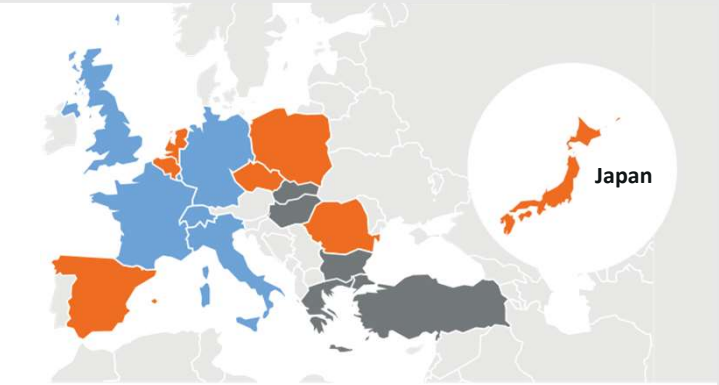
delta lloyd

2016

Acquisition of Delta Lloyd

NN Group

Countries in which we operate



Insurance and Asset Management Insurance Asset Management*

* Outside Europe and Japan, NN Investment Partners has offices in New York and Singapore.

General

Employees
±14,000

Countries in which we operate
18

Customer (excl. NNIP)
17 million

Credit ratings
(Financial Strength Rating)
S&P A | Fitch A+

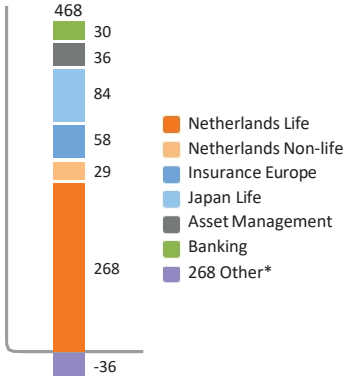
How we are structured

With about 14,000 employees, we aim to deliver high-quality products and services to retail, SME, large corporate and institutional customers.

Our business activities are structured in reporting segments.

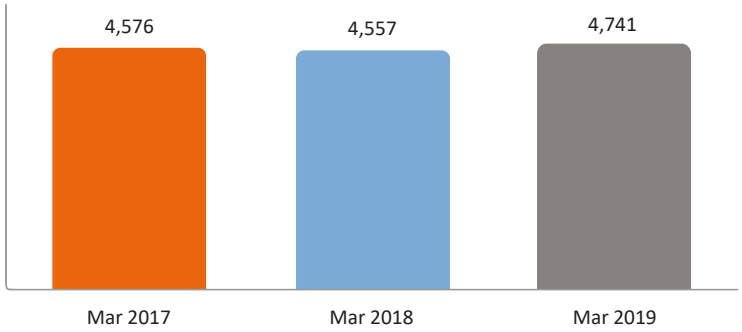
Their contribution to the NN Group 1Q 2019 operating result is depicted in the graph (in EUR mln).

* Japan closed block VA, the reinsurance business, the holding results, and other results.

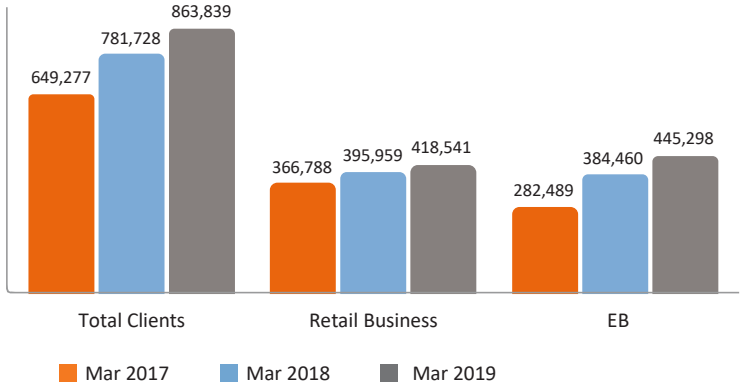


Client Portfolio Evolution

Client balances (AuM mln €)



Client evolution (# clients)



Distribution Channels

Retail

TA

- 41 Branches
- 190 Orange Points
- 9 Franchises

2,016 Agents

* End of April 2019

Bancassurance

ING

3 Life Products

1 Non-Life Product

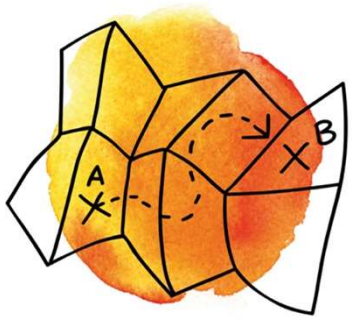
1 Protection Payment Insurance

1 Pension Plan

Employee Benefits (GroupLife)

One of the main players in the market: more than 20 years of experience.

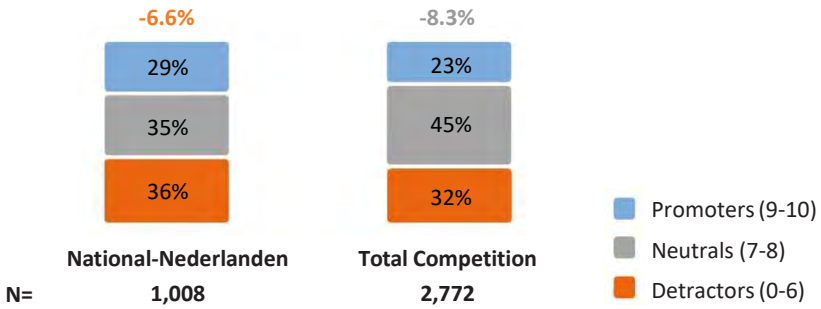
- More than 6,200 clients trust on us to protect the financial future of more than 420,000 employees.
- 15 corporate customers out of 35 companies in the Spanish IBEX 35 Index.



NPS

In the right direction

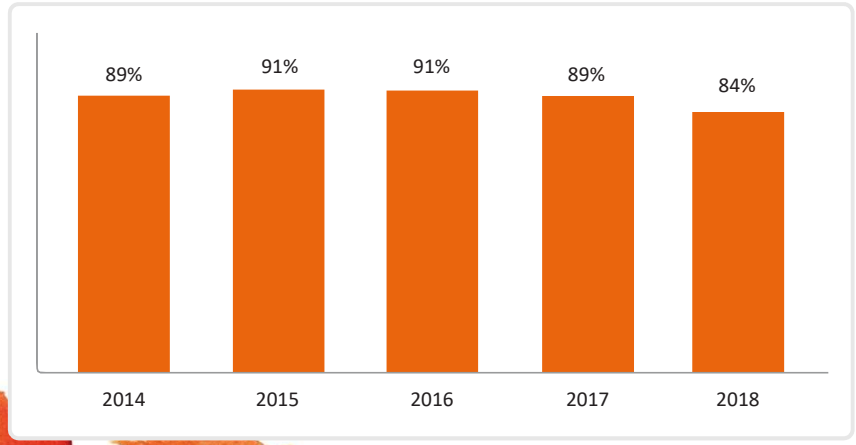
In 2018, for the third year in a row,
Nationale-Nederlanden was the spanish Life Insurance Company most recommended by customers.



% Sure will keep my policy with you in the next year

Source: GFK 2018 Benchmark

Employee Engagement ratio



Awards 2016/2019

Top Employer 2016 to 2019
The Top Employers certification is only awarded to the best companies in the world: companies that have demonstrated the highest standards in its proposition to their employees. This year NN got the award at European level for the first time.

Great Place To Work 2017
Great Place To Work certifies those companies with a strong organizational structure, distinguished by the confidence and quality in the relationships between employees and managers, and those companies with competitive HR policies.

Mejores empresas en 2017
We are one of the top companies to work in, according to Actualidad Económica ranking.

Premio Cegos con Equipos & Talento 2016
Award to the best internal program in the “Training and Development” category for “Las claves para crecer”.

Agile Transformation

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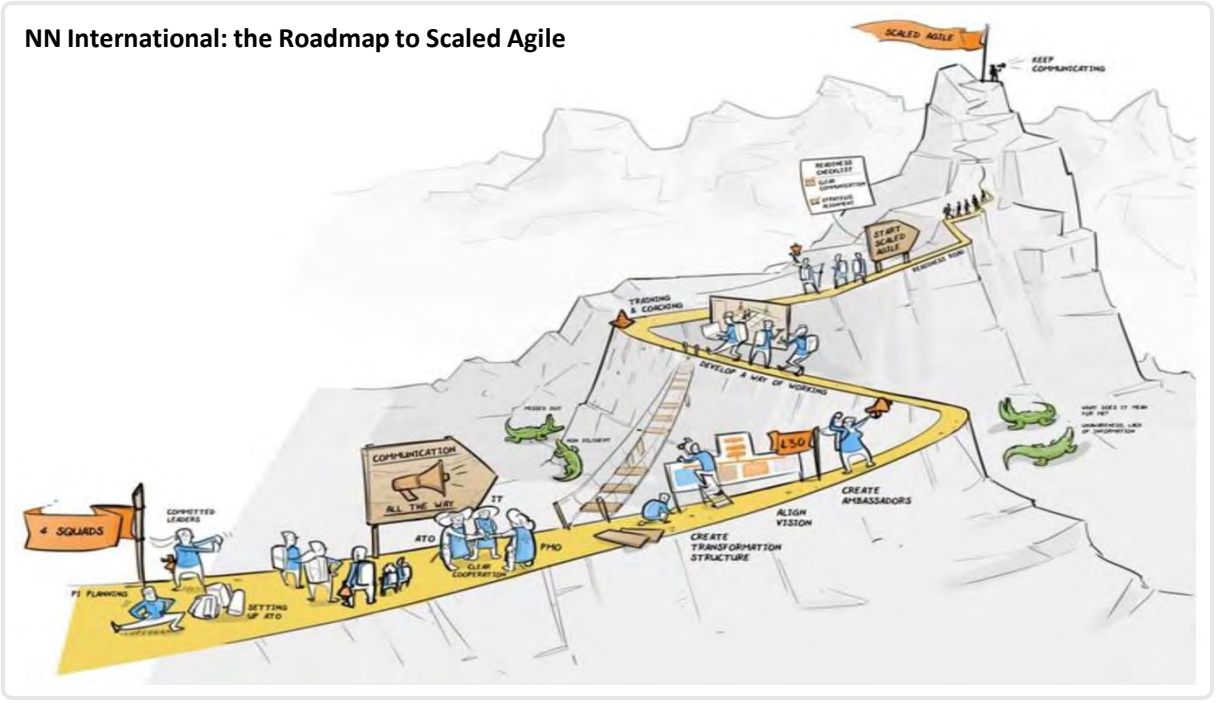
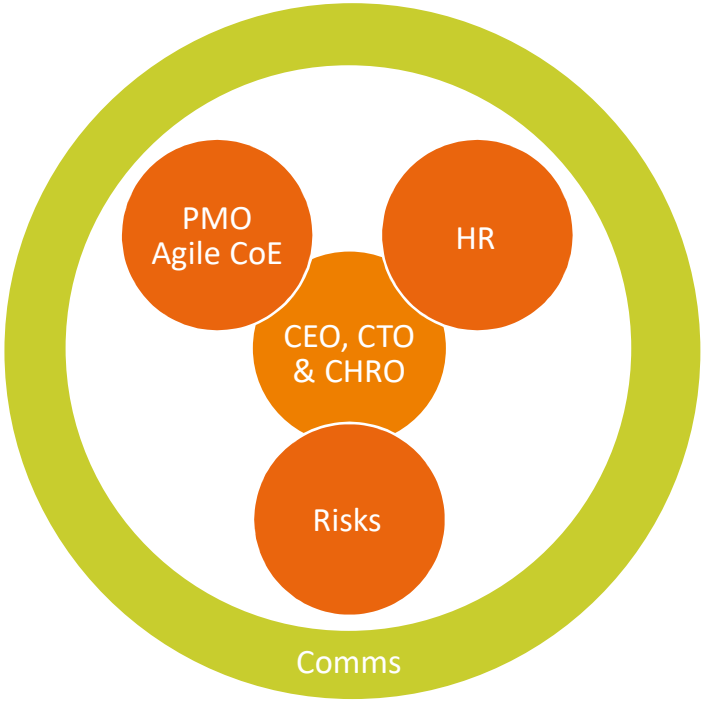
Our journey

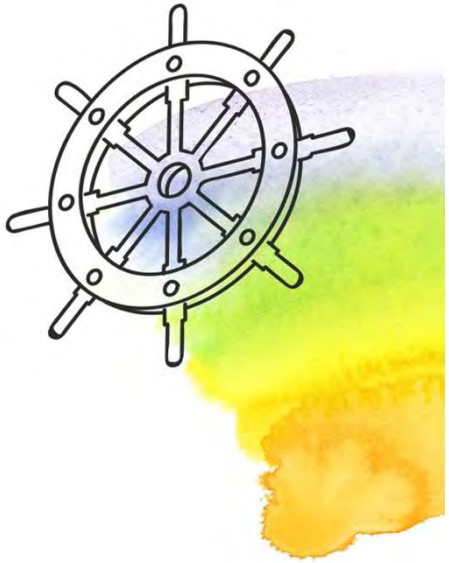
NN International: the Roadmap to Scaled Agile



Agile Transformation Office



- Organizational Design
- People & Culture
- Methods & Tools
- Risk Management
- Communications

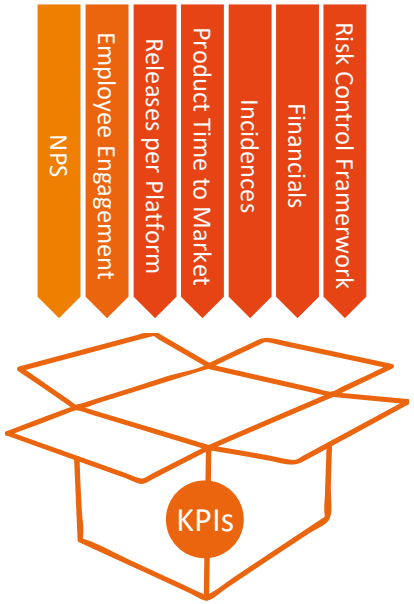


Case for change

Improve customer focus
Only products what customer wants.

Improve employee engagement
Focus empowerment.

Improve speed of delivery
Reduce dependencies waste.

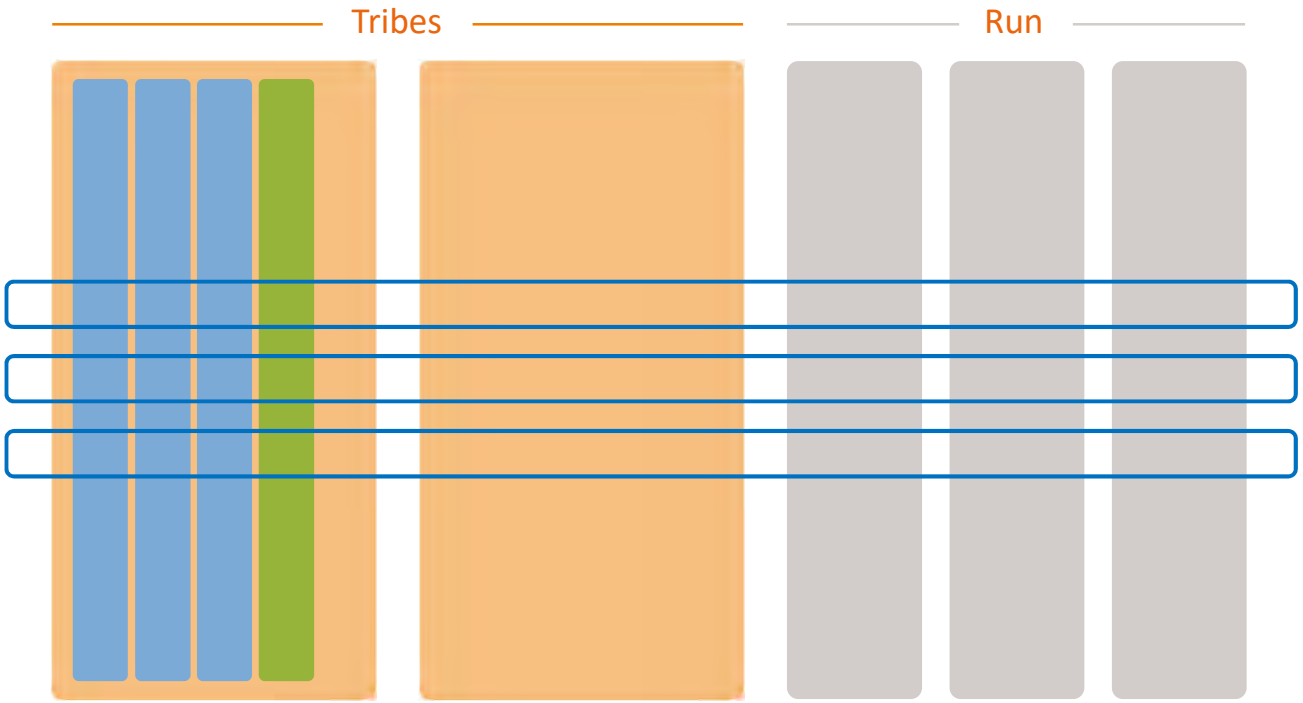


Keep up with our distribution partners

Keep up outperform with competitors

With ever increasingly changing environment
Learn & Adapt

Agile Organization



Chapters

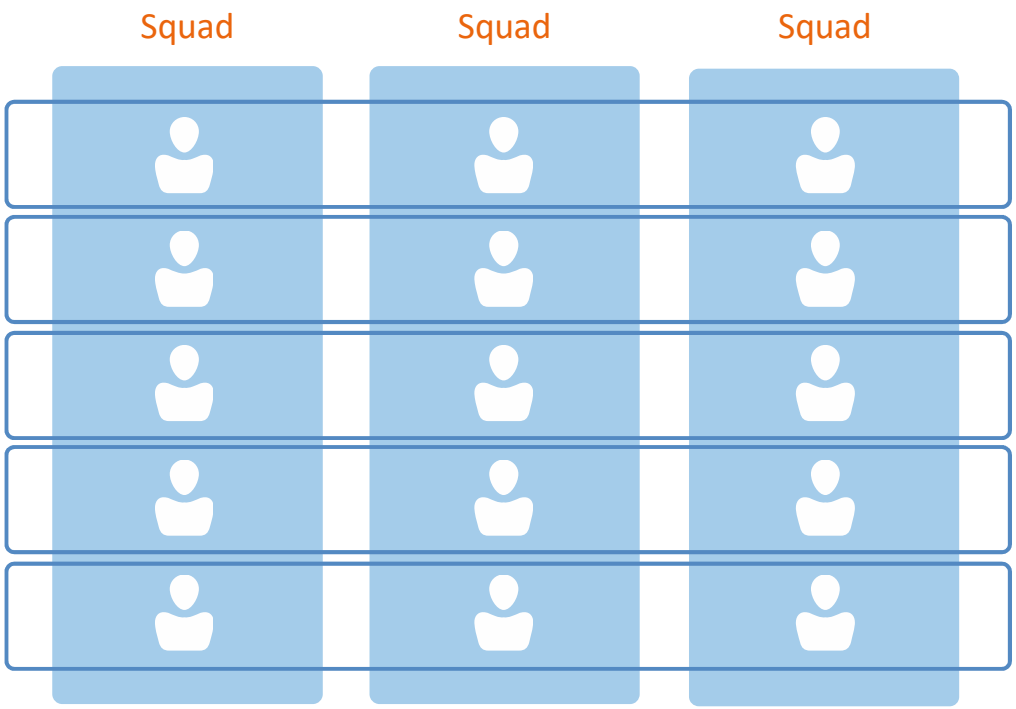
Scrum Team

Kanban Team

Tribe principles

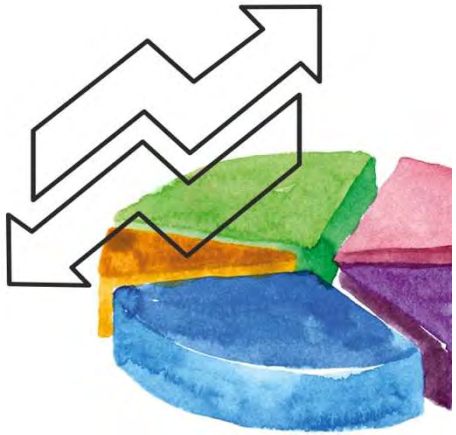
1. Tribes are autonomous, have independent responsibilities, measurable customer centric KPIs, embody end to end processes, and there are no overlaps in business objectives.
2. Strategy is fully covered by the tribes, and each tribe represents a strategically significant business objective.
3. The tribes' mission, budget and capacity is stable on a long term horizon (min. 24 months).
4. The size and strategic relevance of the tribes is relatively comparable.
5. Tribes contain agile team members in the range of ~40-150.
6. Tribe structure is not an identical translation of current org. set-up, but doesn't require major investment to launch.

Agile teams

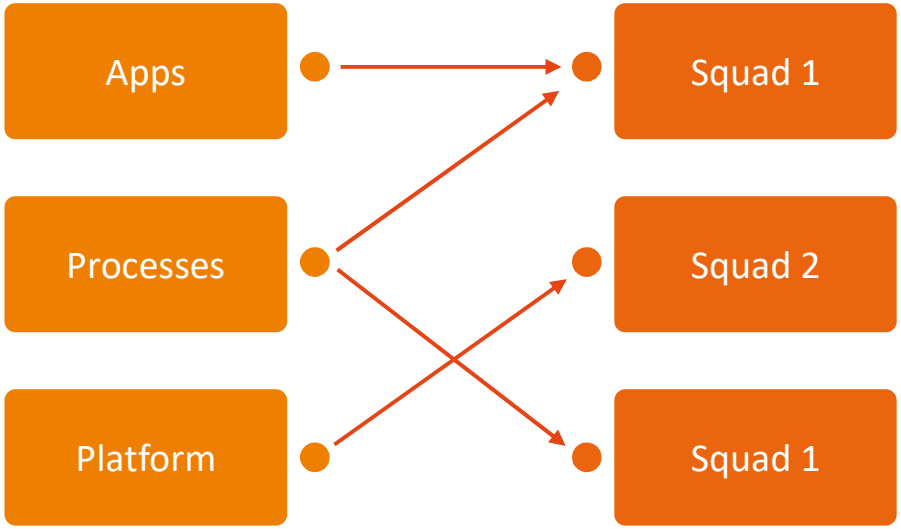


Chapters

- Product Development
- Marketing
- Operations
- IT Front Office
- IT Back Office



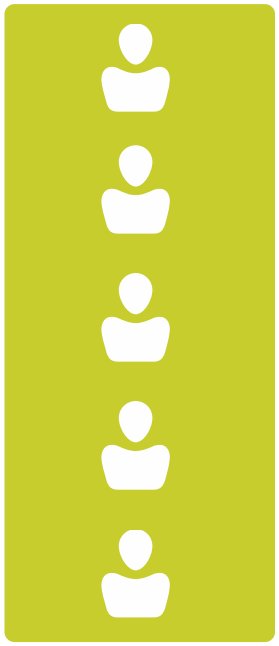
Mapping Responsabilities



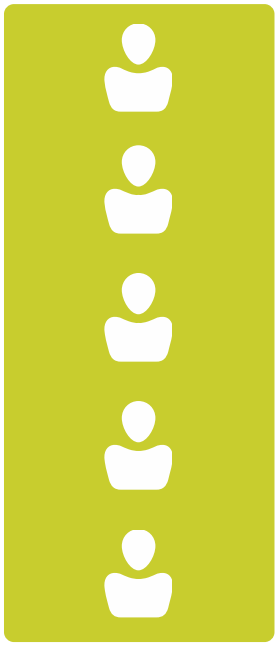
- Map apps, platforms and processes to Agile teams
- Helps defines IT Run per team
- Allocates Features based on scope

Run Teams

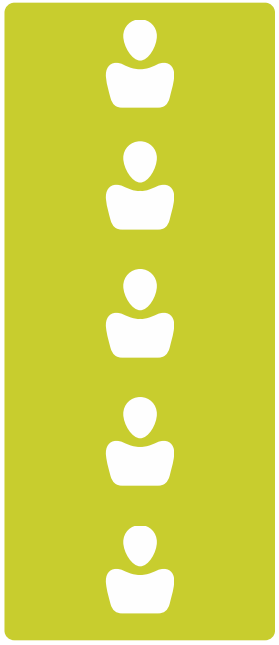
Kanban

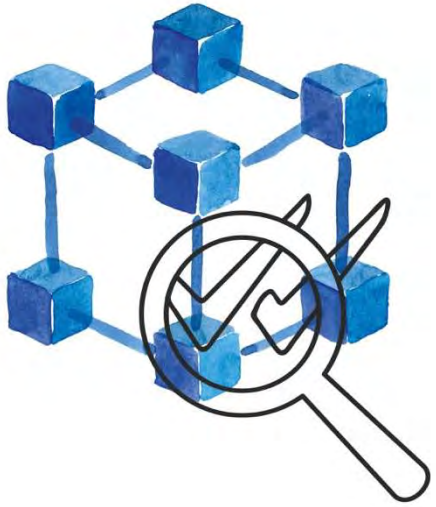


Kanban



Kanban





Training

Change organization

Contents

- **Agile Intro**
- **Frameworks**
  - Scrum
  - Kanban
  - SAFe
- **PO Training**
- **Squad training**
- **PI Event & PI Execution intro**
- **Adaptative leadership**
- **Feedback**

Run organization

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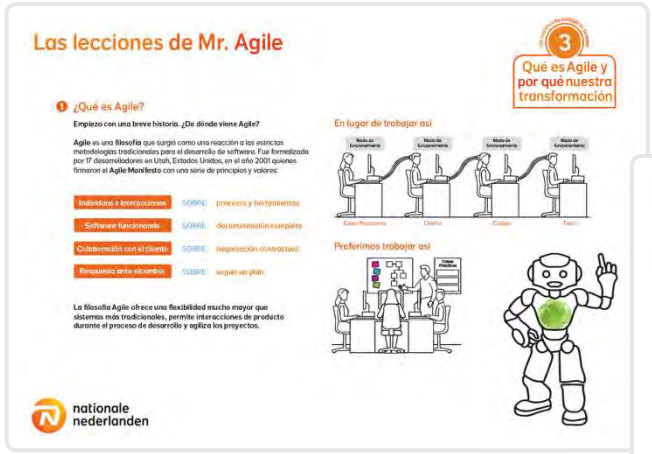
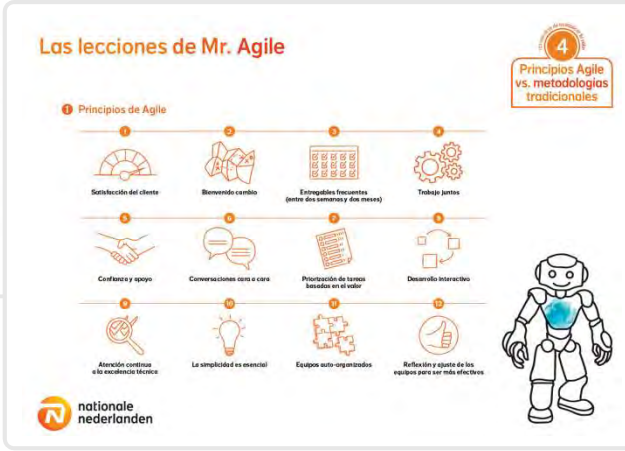
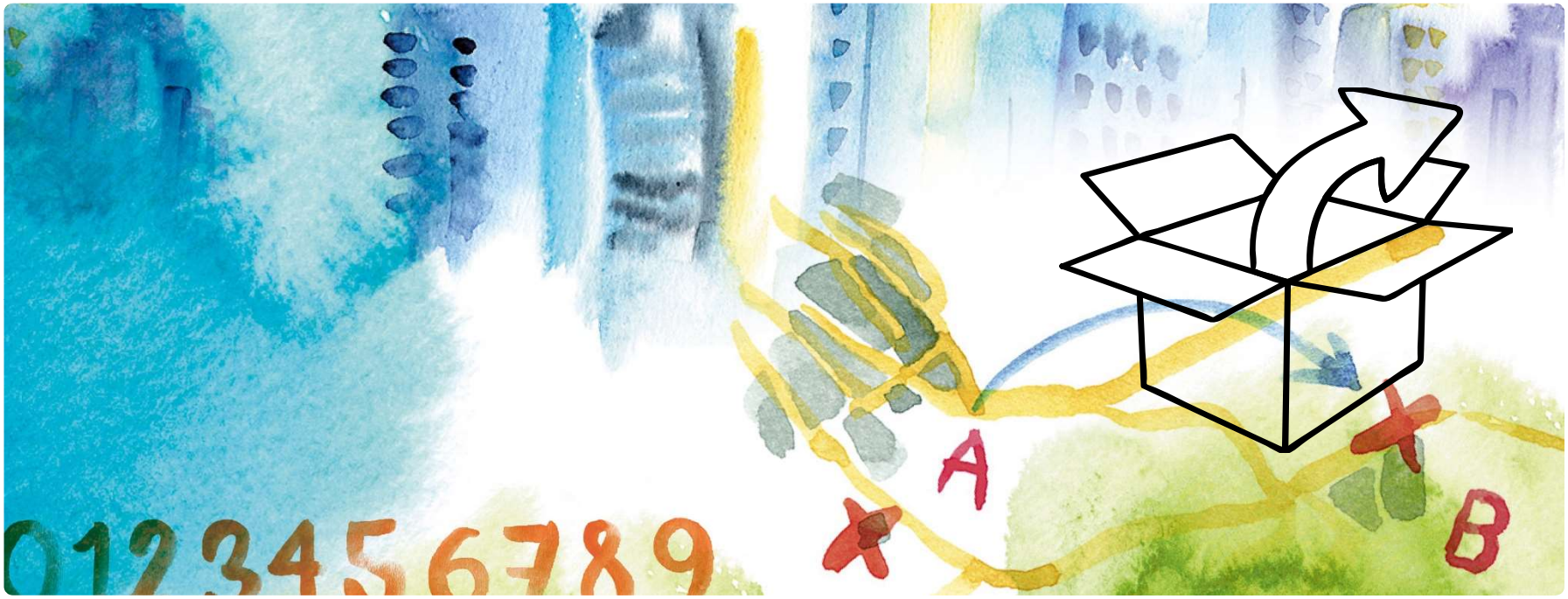
Communications





Agile Center of Excellence



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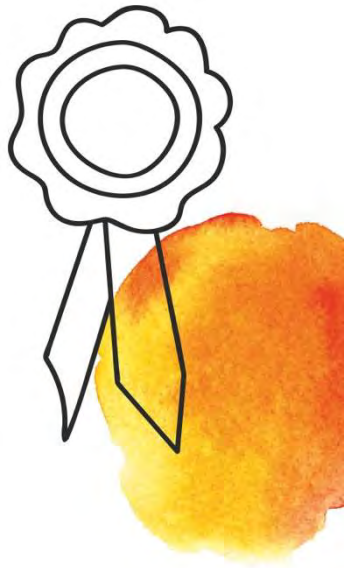
Agile Center of Excellence

Values and Characteristics of any Agile CoE

- Servant leadership
- Building trust
- Passionate about Lean and Agile
- Lifelong learners
- Emphatic and emotional intelligence
- Motivating and inspirational
- Persuasive
- Innovative

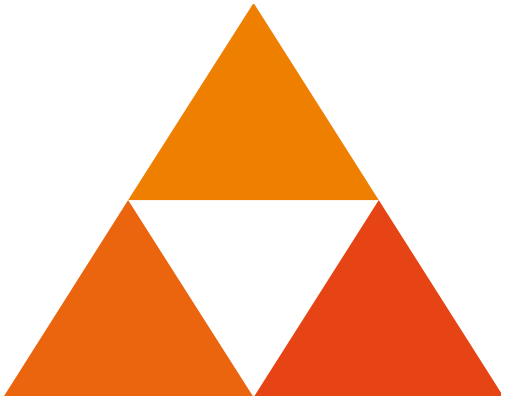


Agile Center of Excellence

A system has to be managed. It will not manage itself.
W. Edwards Deming

Portfolio Management

- Strategy to Portfolio Management
- Manage Epics Flow



Financials & Analytics

- Portfolio Budget & Controlling
- Measurement & Analytics

Program and Team Level Management

- Program Execution
- Coaching and Training
- Tooling and Obeya

Agile Center of Excellence

Head of Agile CoE

- Portfolio & Program Management
- Enterprise Agile Coach

Agile Coaches

- Scrum
- Kanban
- Scaling
- CoPs

Product Owners

- Content authority
- Prioritization at Team level

Portfolio

Program

Team

Trainings

Training and certifications are key to any transformation

Intro to Agile & Scrum

- 200+ employees
- CSMs & PSMs

Kanban

- Kanban Systems Design
- Kanban Management Professional
- 100+ employees internally trained

SAFe

- Leading SAFe
- Product Owner/Product Manager

Lean Agile Portfolio & Program Management

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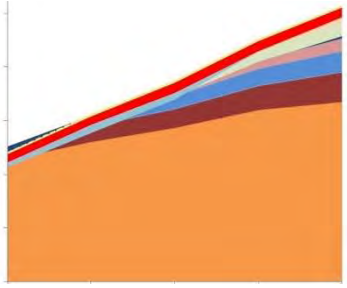
From Strategy to Execution

Strategic Roadmap

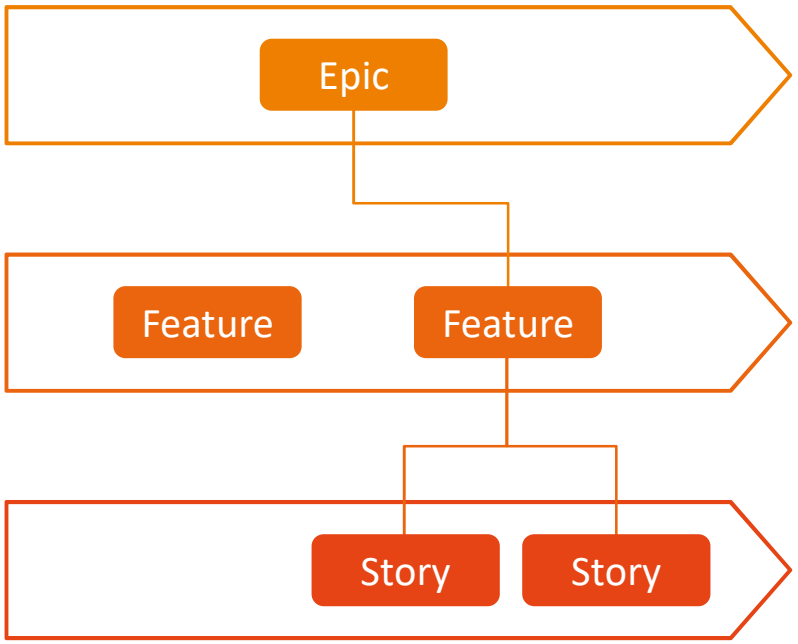
- Strategic Categories
- Themes
- Epics



Performance Management

- Milestones
- KPIs
- Financials

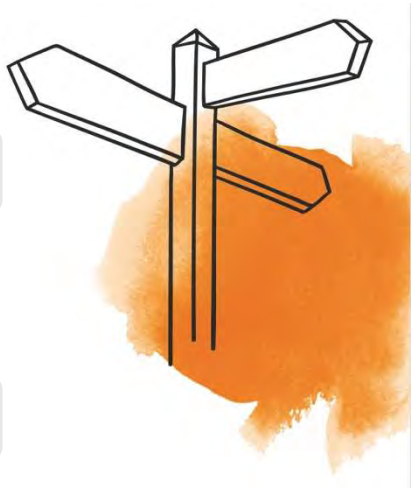
Product Backlog Layers



Portfolio level – Business Needs

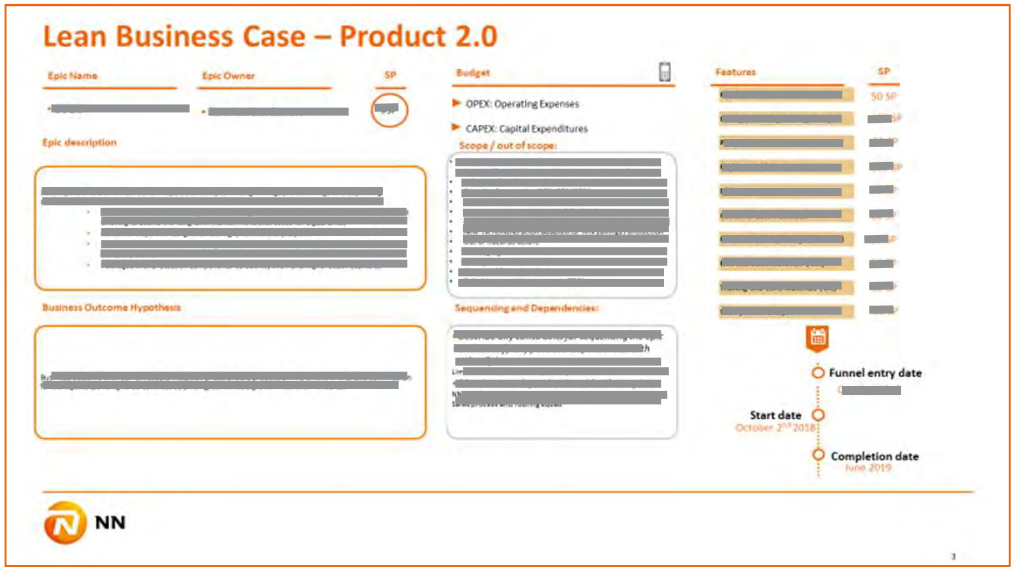
Program Level – Product Needs

Team Level – Product Implementation



Epics

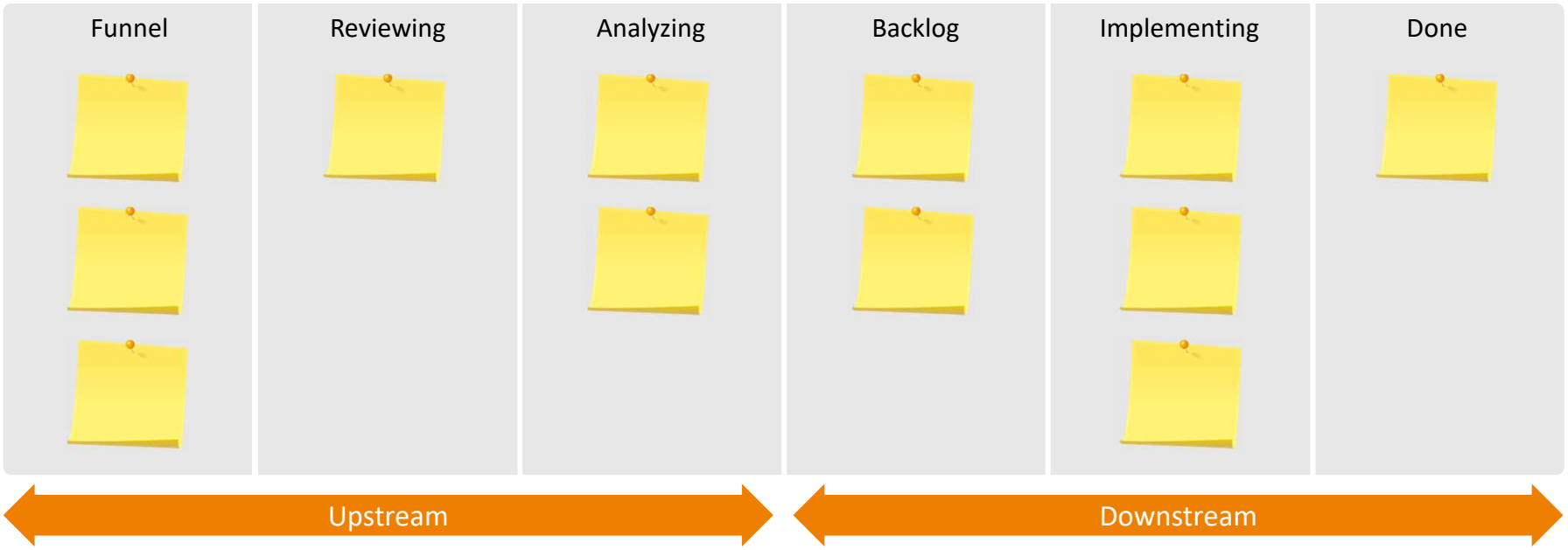
Epic Description and justification of business need via a Lean Business Case



- Epic Name
- Epic Owner
- Epic hypothesis description
- CAPEX & OPEX
- Features (MVP and additional)
- Estimation of size in PIs
- Funnel entry date
- Estimated start date
- Estimated completion date
- KPIs

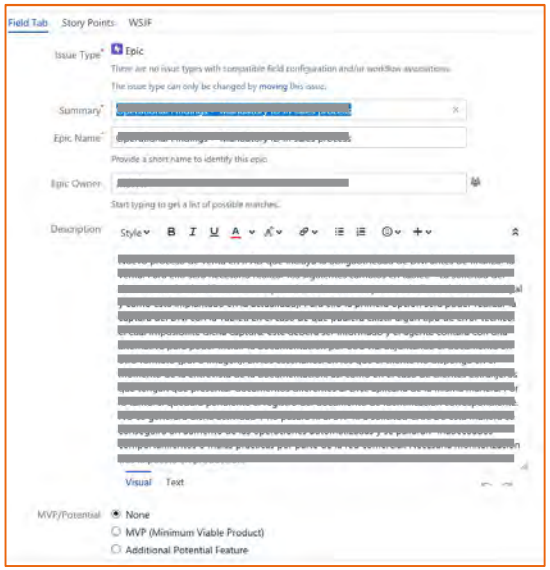
Portfolio Kanban

Visualize and manage the Flow of Epics



Features

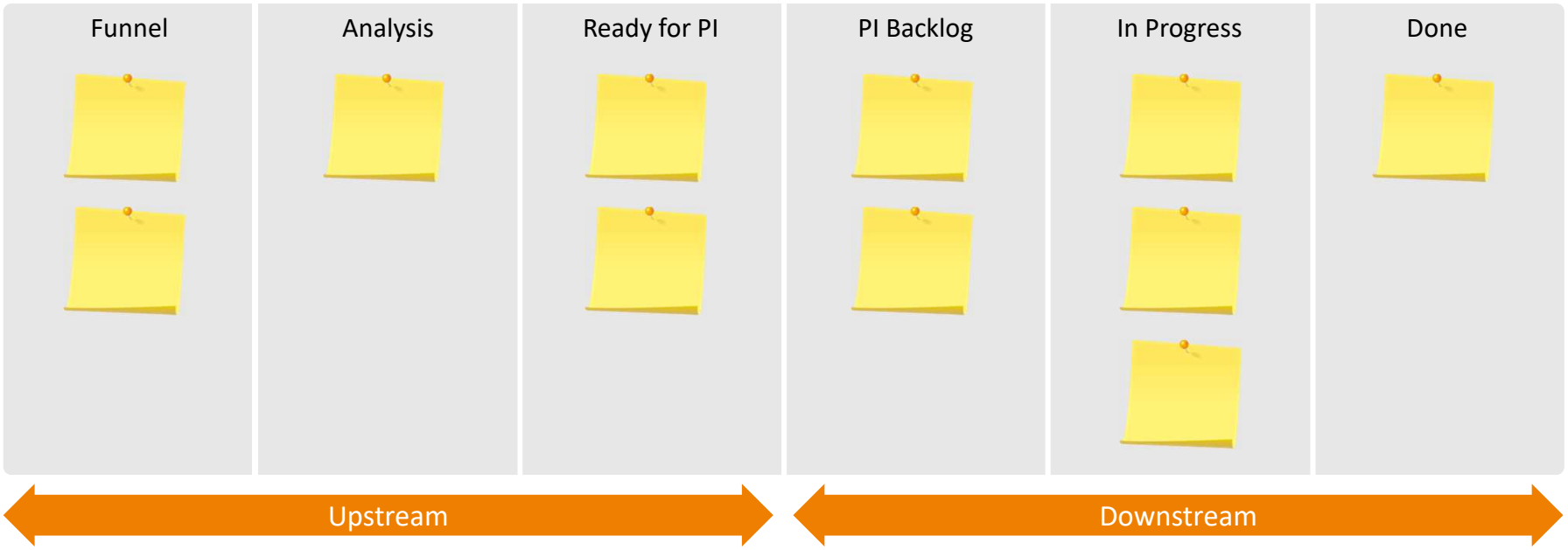
Feature A functionality or solution that provides value to a user



- Description
- Scope
- Benefit hypothesis
- Acceptance Criteria
- Leading Team
- Teams involved
- External dependencies
- Estimation of SP by team
- MVP Y/N
- WSJF

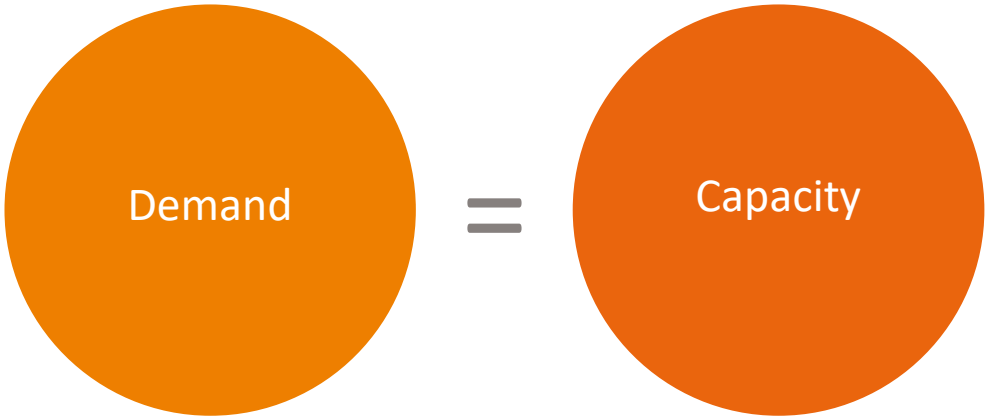
Program Kanban

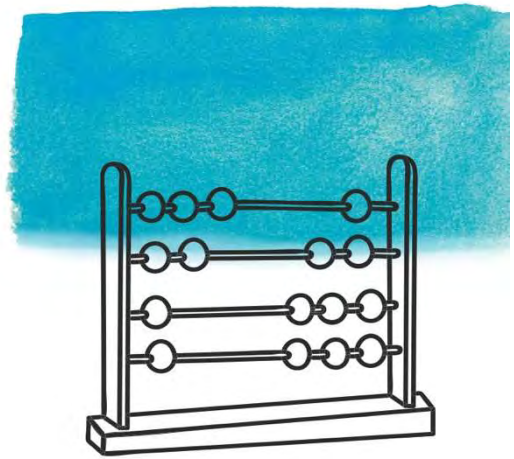
Visualize and manage the Flow of Features



Demand and Capacity

Capacity and demand are one of the key discussions always in portfolio management:





Waterfall

Project 1

Deliverable 1 | Deliverable 2 | Deliverable 3

One Project – All Scope – One team

Similar or equivalent but no the same

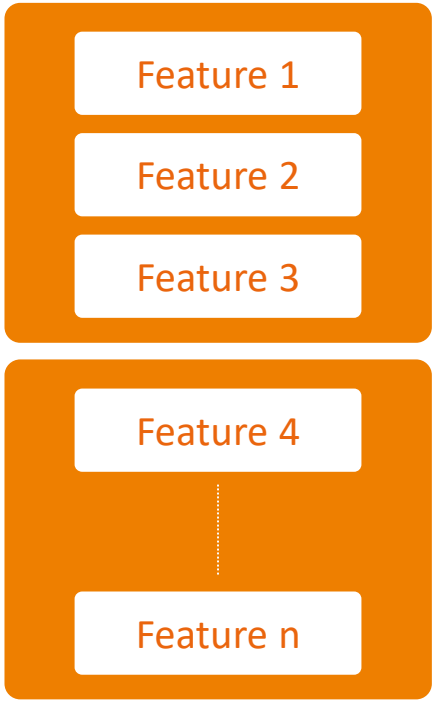
Agile

Epic 1 | Epic 2

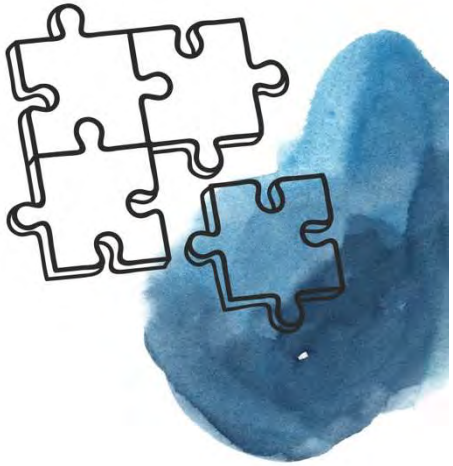
Feature 1 | Feature 2 | Feature 3 | Feature 1

One Epic – 3 Features – Two stable teams

Program Backlog Prioritization



- Ranked by order of priority by PO to have a mix of features covering all Themes
- Weighted Shortest Job Fist is used to calculate priority by PO at theme level
- WSJF = Cost of Delay / Job Size
- and then discussed with Tribe Leads to decide final ranking



Demand vs. Capacity Matching

XXX
SNAKE OIL PROMOTIONS

Big Room Planning

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Agenda Day 1

9:30 – 10:00	**Welcome & Business Objectives**		Tribe Strategy & Next Objectives
10:00 – 10:15	**Features PI 2019.2**		Features in scope for PI 2019.2
10:15 – 10:30	**Planning Process**		Portfolio Manager explains the PI planning process
10:30 – 15:30	**Team breakouts** **Coffee break & Lunch**		• Teams work on draft plans, identify risks, impediments, and draft objectives. • Portfolio Manager and Agile Coaches provide support. • Portfolio Manager manages the team dependencies • Scrum of Scrum checkpoints
15:30 – 16:30	**Draft plan review**		Teams present draft plans, risks and impediments Tribe Leads present
16:30 – 17:30	**Tribe Leads review & problem solving**		Adjustments made based on challenges, risks, and impediments

Agenda Day 2

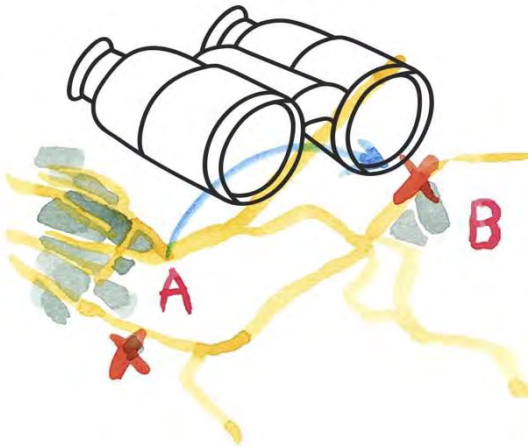
9:30 – 10:00	**Planning adjustments**		Planning adjustments made based on previous day's Tribe Leads meeting
10:00 – 13:30	**Team breakouts** **Coffee break** **Company objectives** **Lunch**		• Teams develop final plans and refine risks and impediments • Portfolio Manager manages the teams dependencies • **Present PI objectives and assign value to these company objectives at 12:00**
13:30 – 14:30	**Final plan review**		Teams present final plans, risks, and impediments **(1 person per team)**
14:30 – 15:00	**Program risks**		Remaining program-level risks are discussed and ROAMed, including
15:00 – 15:30	**PI confidence vote**		Team and program confidence vote
15:30 –	**Plan rework if necessary**		If necessary, planning continues until commitment is achieved
After commitment	**Next steps & planning retrospective**		• Moving Forward • Retrospective (on the way out)

Features PI 2019.2

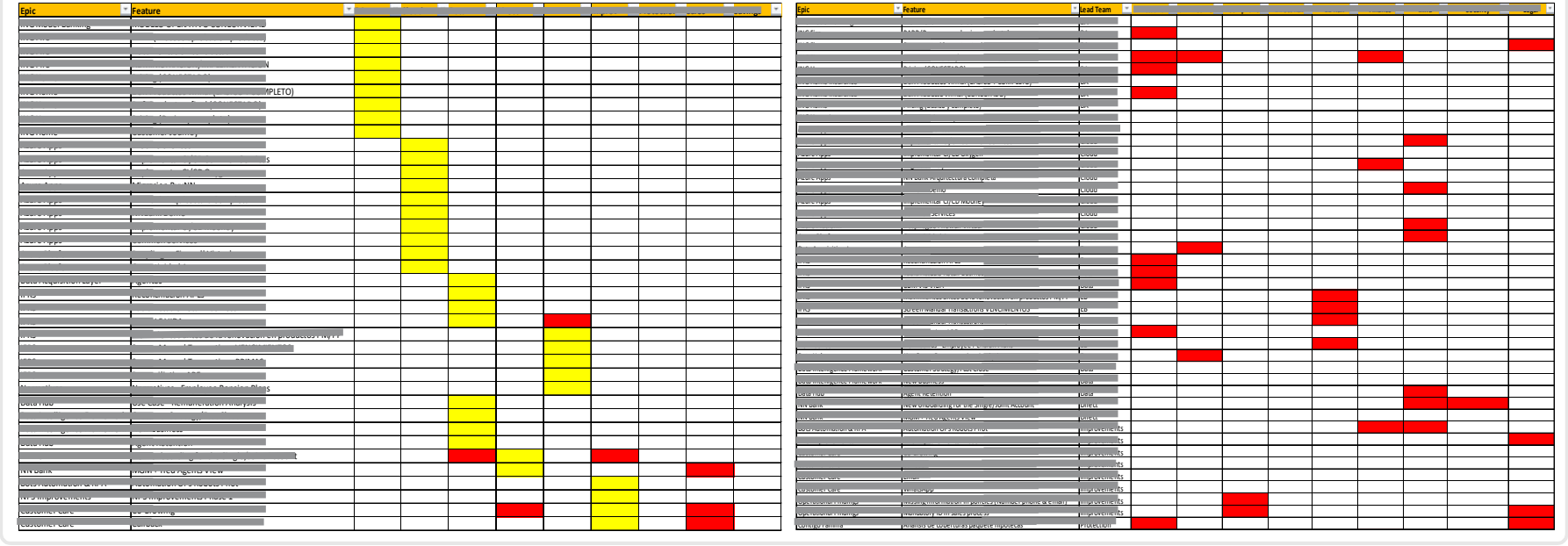
Features

64 features in scope

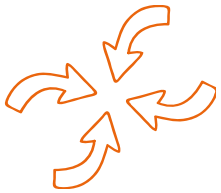
- 24 features for Strategic Category 1
- 9 features for Strategic Category 2
- 8 features for Strategic Category 3
- 13 features for Strategic Category 4
- 10 features for Strategic Category 5



PI Planning process: Feature list – Team and Run dependencies

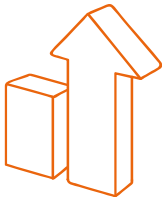


BRP Planning process



Capacity:

Keep in mind team capacity when loading sprints and take into account features sequencing and dependencies.



Ownership:

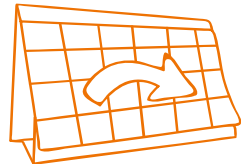
Take ownership of the end2end feature designated to your team. Not only for the part in your team but for the full feature.

Dependencies:

Not only identify your dependencies but also manage them. Meaning, come to agreement with involved parties regarding scope, timing, etc.

PI objectives:

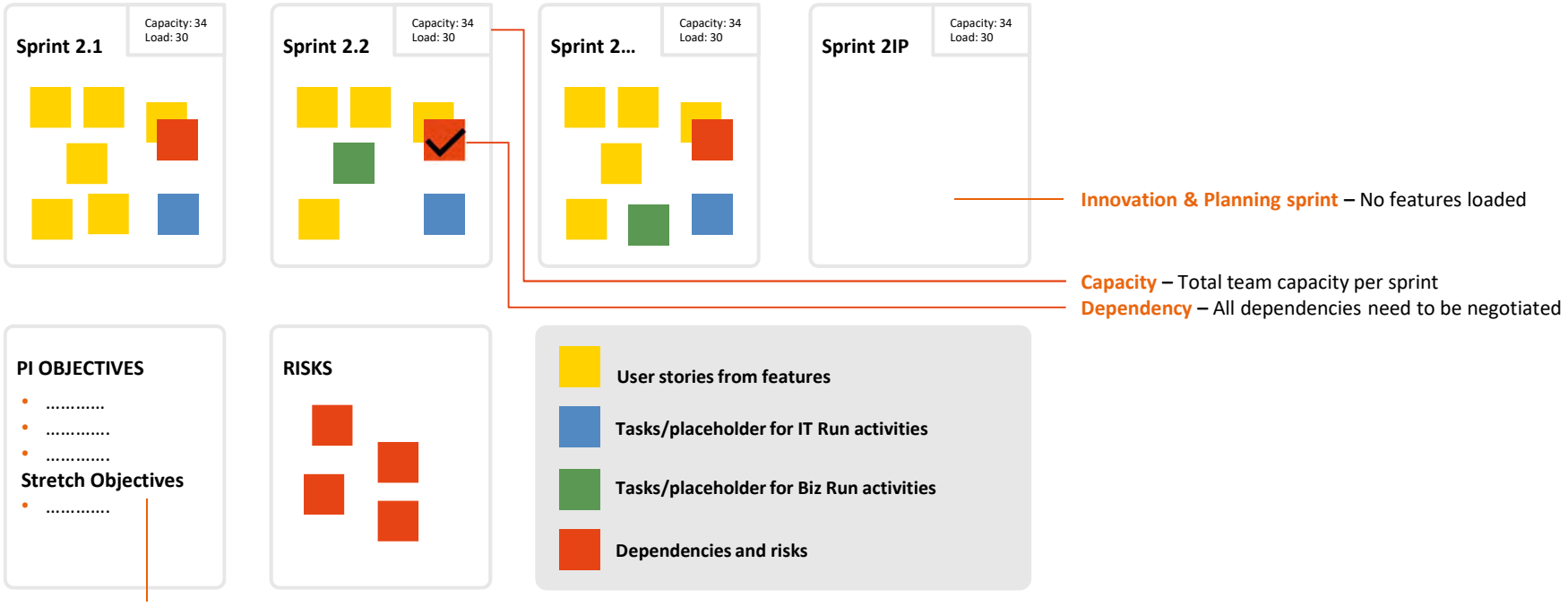
Start on time defining your team and PI objectives. Make these understandable for the business stakeholders but also feasible and measurable. (Stretch objectives)



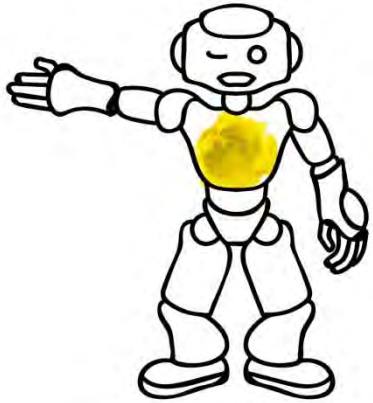
Program board:

Don’t forget to update the program board with feature delivery and dependencies.

BRP Planning process – Team Boards



Big Room Planning



Obeya Room and Team Boards

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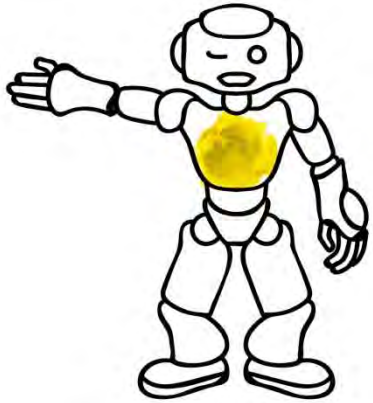
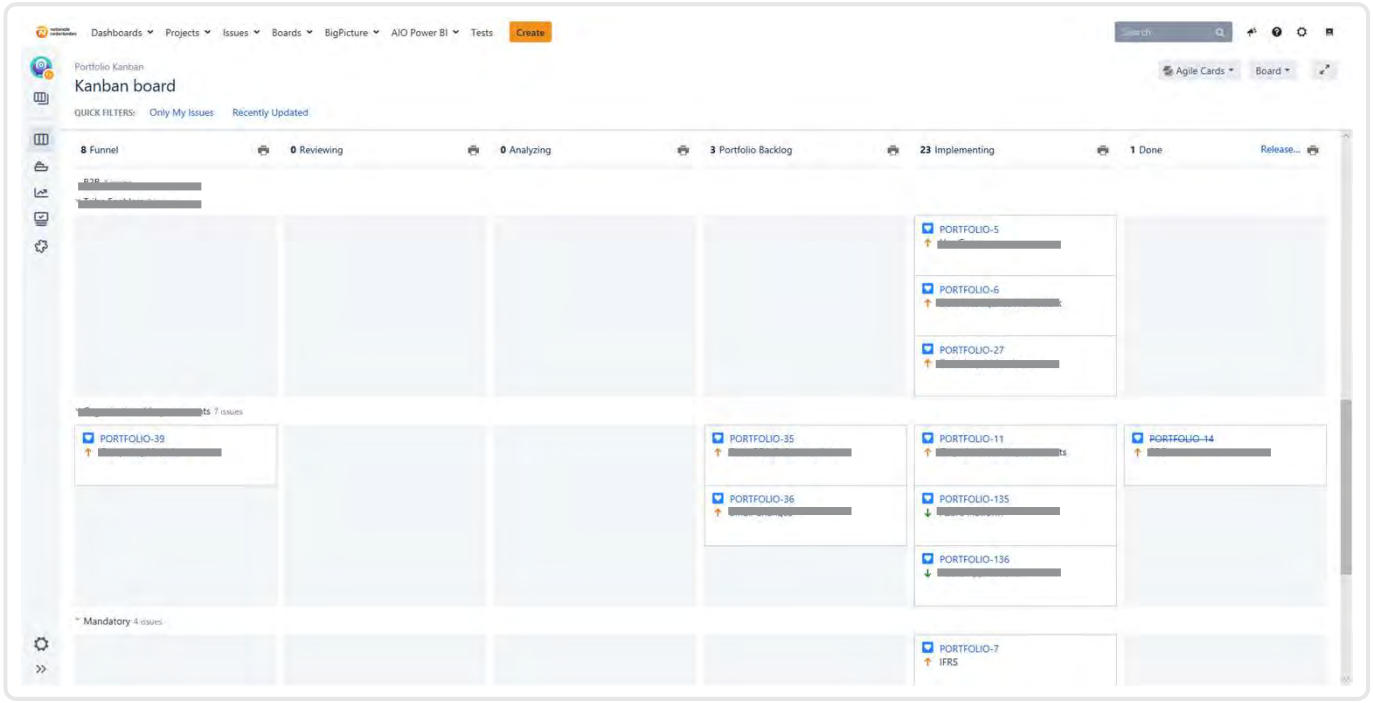
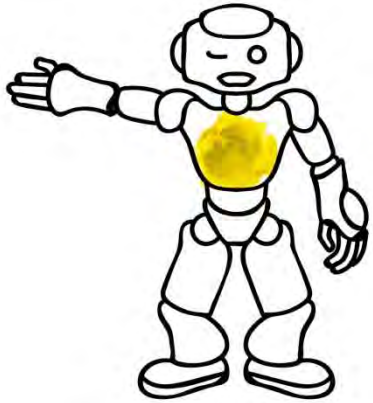
Portfolio Kanban

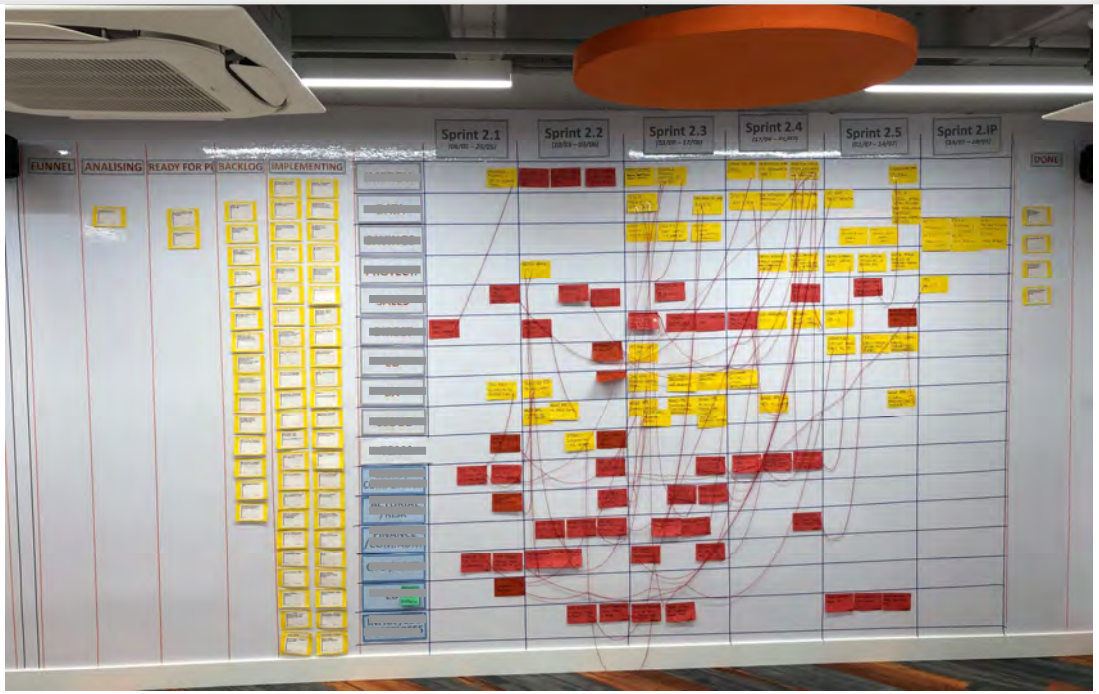


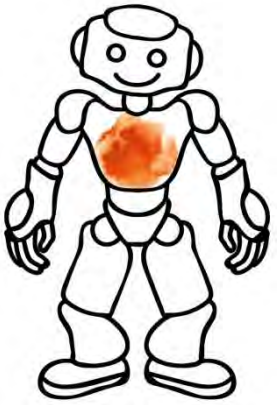
Portfolio Kanban



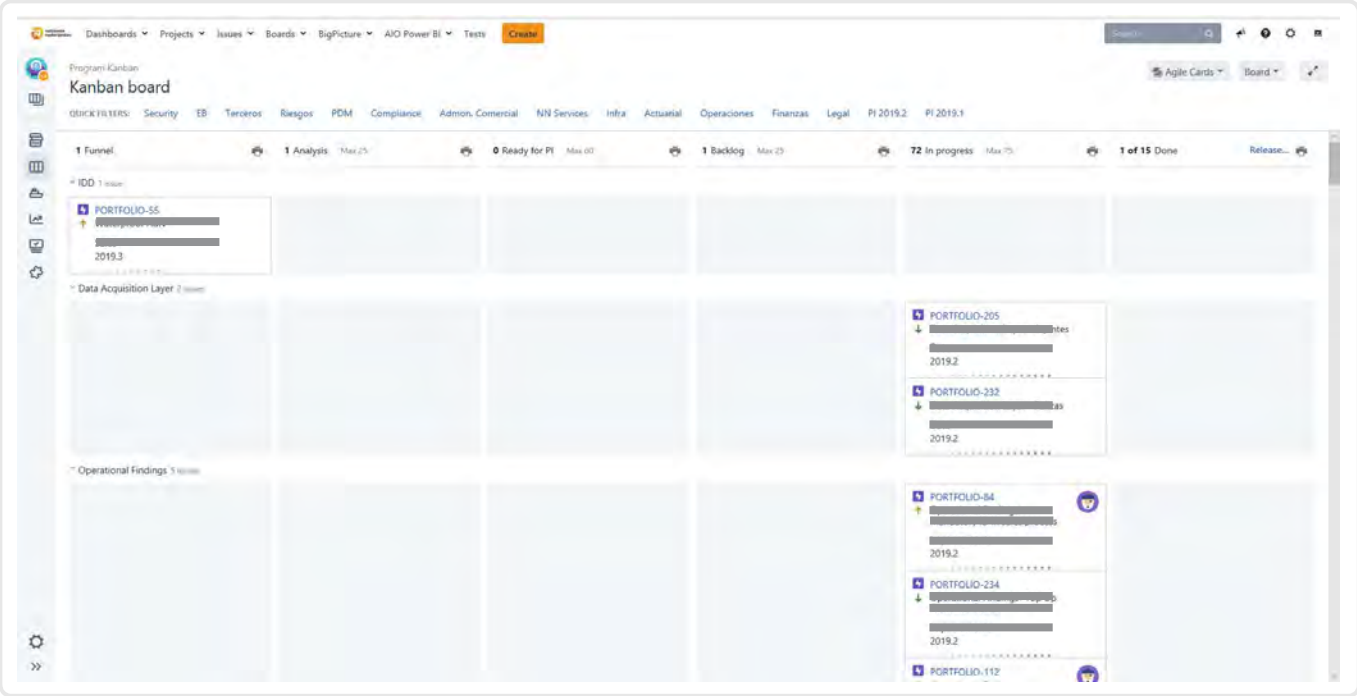


Program Board

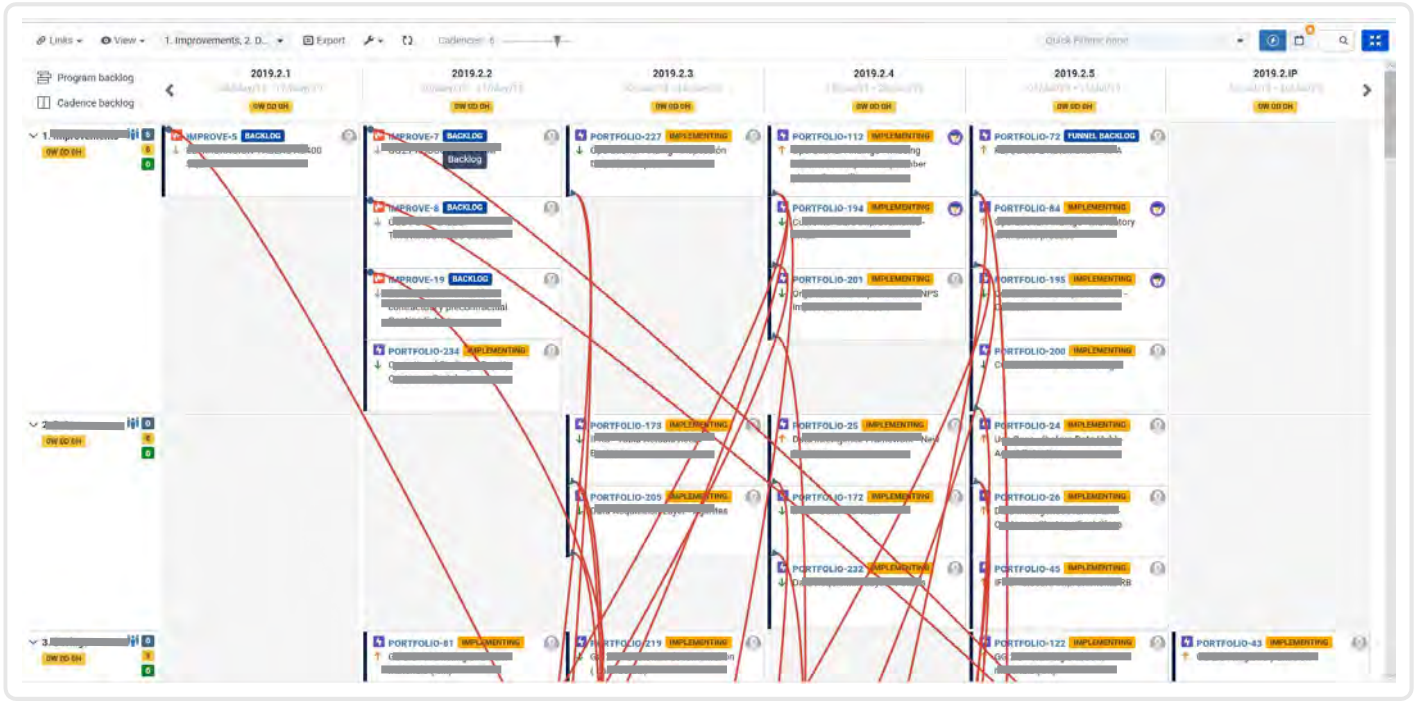


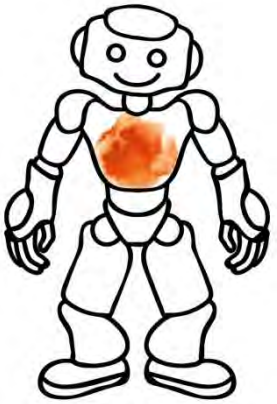


Program Kanban



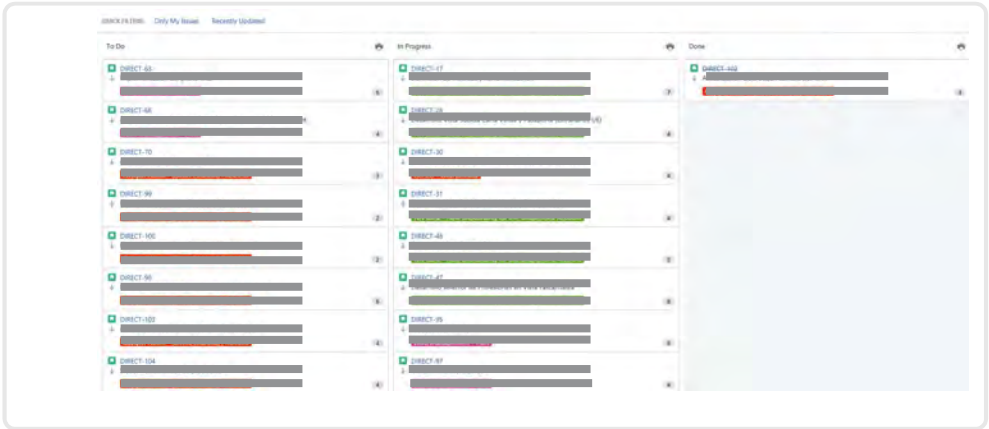
Program Board





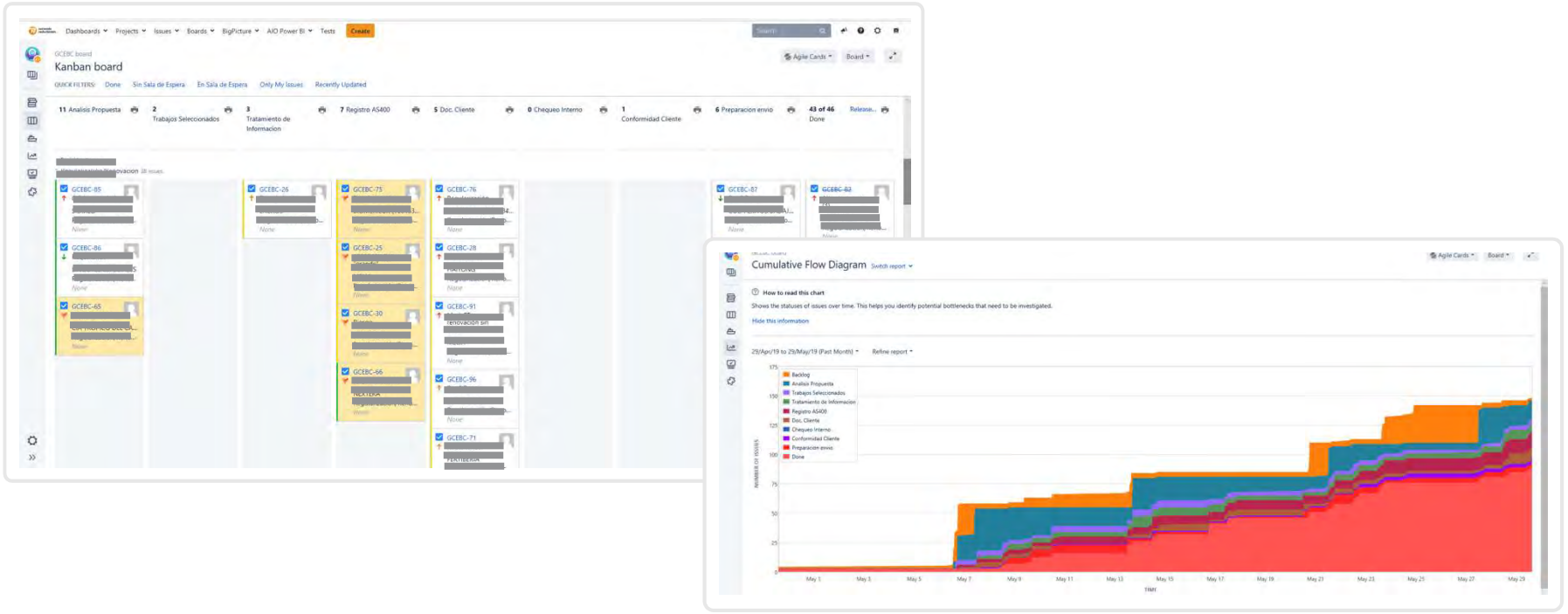
Scrum Teams

backlog
to do
doing
done
Sprint
3/6
17/6
Alerts/Blocs
Capacity
Load
Action Retro
OUR RULES



Kanban Teams

Kanban Teams



Dashboards

PI
1
2
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Squads
PI
2019.1
2019.2
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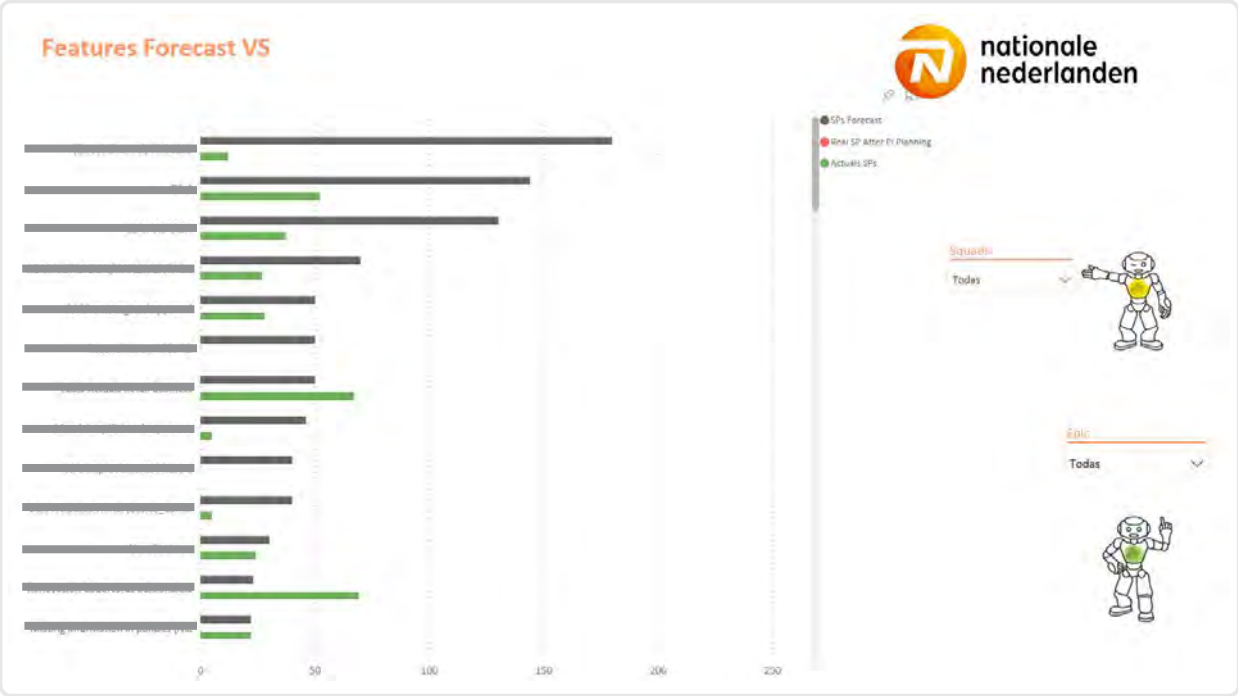
Actual Capacity
Forecast SPs vs Actuals SPs
Business Run
Service Request
IT Incidences
Features

Dashboards


Features Forecast VS
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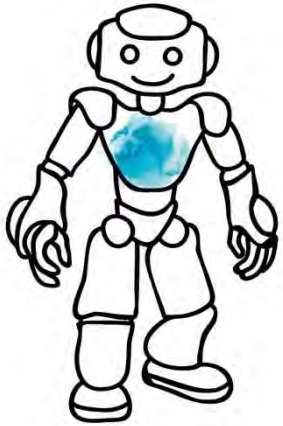
SPs Forecast
Real SP After PI Planning
Actuals SPs
Squads
Todas
Epic
Todas
0
50
100
150
200
250



Maturity Scans

Conclusion

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adidas
9959
10539

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