

# Incumbent Swedish bank - Lean Portfolio Management Implementation

## CHALLENGE

The bank committed on a journey to harmonize the enterprise due to increased pressure from regulators and a burning foundation, with challenges such as different ways of working, differing governance, and many parallel / siloed initiatives that lacked transparency of capacity, holistic prioritization and progress.

## SOLUTION / APPROACH

Deloitte supported the Portfolio Owner in establishing the LPM framework, including strategy and funding of the portfolio through OKRs. The work also involved driving a dependency mapping across portfolios to support capacity planning and enable the execution of portfolio objectives. Deloitte worked closely with the client to design and implement a new portfolio governance structure and cadence.

Deliverables:

- Defined the portfolio vision, introduced portfolio OKRs, and ensured connection to enterprise strategy
- Conducted a supply & demand analysis for funded portfolio EPICs, and any knock-on effects on other portfolios
- Enabled performance tracking and established supporting tool for effective and transparent financial follow-up

## PRIMARILY APPLIED LPM CAPABILITIES

### STRATEGIZING

Defining portfolio strategy and OKR's

### DELIVERING

Dependency management to other portfolios

### MEASURING

Established performance tracking

### TOOLING & SUPPORT

Established tool for financial follow-up

