



CASE STUDY

DESIGNING OPTIMAL RESOURCE MANAGEMENT IN A REGULATED ENVIRONMENT

A Complex Financial Services Company Resets Technology for Future Growth

OPTIMIZE

THE BUSINESS CHALLENGE

AGSI's client, a new technology leader in a mammoth financial services company, had quickly identified performance issues. With no math-based relationship in the triad of his budget, demands from the business, and org capacity, he owned a committed project portfolio that appeared to dramatically exceed capacity. Utilization rates were confounding, far exceeding industry norms. Facing the very real prospect of missing his year from the start, he asked AGSI to conduct a thorough assessment of the current state of his team's delivery, with particular focus on how they were tracking consumption and handling governance. Next steps could be recommended once the issues were in focus, and any changes would have to meet the strict standards of the larger regulatory compliance process.

AGSI'S HIGH-LEVERAGE SOLUTION

Using AGSI's proprietary BT3™ framework, which integrates best practice research from more than 40,000 organizations, we analyzed and mapped our client's entire delivery ecosystem. Their utilization mystery was explained by a culture that promoted time charges to various projects as a pro forma process. They were in a footrace to consume their budget so it wouldn't be taken away in Q4; yet they didn't have enough capacity to execute projects that would use the budget – so they lost budget and missed still more commitments. Despite many individual heroics, they measured at 1.5 on our industry capability scale of 1 to 5. Our delivery map showed graphically (and allowed our client to show firm leadership) every point where the organization was not overlapping with best practices in processes, tools, resources and data.

Another key piece of analysis was produced by our proprietary Workforce Capacity Calculator™ (WCC). This framework allowed us to analyze roles and skills, projecting down to the quarter our client's ability to match supply and demand for each of the organization's five technology portfolios. Again, gaps were clear, including the fact that they were devoting twice as many resources to Q&A as industry standards advised.

With this clarity, we produced an evidence-based plan that would take our client from current state to the desired level 3 on the capability continuum. That progression also allowed us to project a measurable increase in capacity of 12% using the same resources, while WCC laid out the optimum human capital model to meet their demand. When the client organization was pulled away from solution implementation by other demands, AGSI was able to fill those gaps and provide ongoing coaching, problem resolution and training. Just as important, our experience in regulated environments enabled us to collaborate effectively with the Compliance team and satisfy their requirements.

VALUE TO THE ENTERPRISE

The increase in capacity alone has a projected value of \$22M in year one. Our client can now forecast accurately, set realistic expectations, manage demand and supply, and drive more throughput. Technology team satisfaction and customer satisfaction have improved. And every element of the new process aligns with business requirements, supporting enterprise growth.

IN BRIEF

CLIENT:

U.S. Financial Holding Company / NYSE

ENGAGEMENT:

Resource Management Assessment, Solution Design & Implementation

CHALLENGE:

Help a new technology leader diagnose major misalignment between budget, demand, capacity and utilization; develop a sustainable solution.

OUTCOME:

With root causes clearly identified, the organization gains a compliant, metrics-based resource management roadmap that conforms to best practices and yields 12% more capacity.