

Agile Advisory Services to Deliver a Custom-Designed Implementation Program of Lean/Agile Workflow Methodologies

The Challenge

The client, a global asset management firm, aimed to increase revenue, deliver faster to market, and address their workflow roadblocks by adopting a lean approach to aligning Sales, Affiliate Relations, and Compliance. This approach would manage project flow by limiting the amount of works-in-progress, thereby narrowing focus and preventing late-term and excessive context switching. Despite the client's interest in executing a new type of workflow model, they simply did not possess the knowledge, expertise, and bandwidth to begin the process of implementation.

The Solution

The client chose to partner with Eliassen Group's Agile Practice due to our reputation in the client's market as a local leader in the delivery of Agile services. The partnership began as an advisory services engagement that initially involved the completion of a Business Agility assessment. Eliassen Group executed this assessment by delivering an on-site Agile Delivery Lead, who processed the client's day-to-day internal workflows and then designed a personalized roadmap of how they could most effectively and efficiently introduce Lean/Agile principles to their teams. Now that Eliassen Group has successfully delivered a presentation of the findings and recommendations to the client's leadership team, the client's next step will be to employ additional support from EG to implement the established plan.

The Client

Global Asset Management Firm

The client is a long-running global asset management firm uniquely diversified in delivering specialized capabilities across a spectrum of equity, fixed income, liquidity and alternative investments. The client's long history as a leader in its field has led to great success; however, its internal workflow processes are steeped in outdated practices and strategies.

Highlighted Results

- An Agile Delivery Lead was deployed to build a bespoke roadmap of Lean/Agile implementation, designed specifically to accommodate for the client's unique workflows and demands
- The client's leadership team was provided with a thorough presentation of findings and recommendations pertinent to minimizing the disparity between its current practices and ultimate objectives vis-à-vis project methodologies

The Result

The client is excited to utilize Eliassen Group's recommended plan of action in introducing Lean/Agile practices to their workflows and establishing an entirely new working model.

The client is now prepared to move forward with in-practice implementation, with the help of Eliassen Group's consultation services, and will rely on the recommendations of the Business Agility assessment to do so.