



## Case Study

# Unifying Data and Strategy: Citizens Bank's Path to Agile Enterprise Management

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## Company Details

**Industry: Banking**

**Company Size: 23,000+ employees**

**Location: United States**

**Cprime Services:**

- [Enterprise Technology and Financial Management](#)
- [Apptio Targetprocess Implementation and Optimization](#)



## The Problem

Citizens Bank was grappling with a tangle of disconnected systems and opaque processes. Cprime's experts helped align IT with Finance and open a fresh perspective for data-driven decision making by implementing and optimizing their tooling and processes.

## A Storm of Challenges

Citizens Bank was navigating through some turbulent waters:

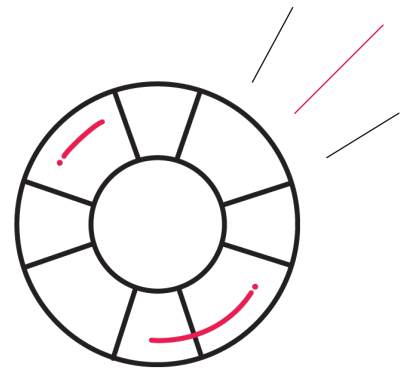
- A sea of siloed data across multiple systems led to discrepancies in resource utilization and billing inconsistencies.
- The bank's 90 value streams were adrift, lacking standardization in budgeting and financial reporting.
- Strategic objectives were disconnected from the actual work being performed, like a ship without a compass.
- Resource allocation was based on subjective decisions rather than data-driven insights.
- Financial data was fragmented, requiring manual compilation from various source systems.
- The bank struggled to link team costs to value delivered, making it challenging to justify expenses or optimize resource allocation.



## A Beacon of Hope

Cprime didn't just throw Citizens Bank a lifeline; they provided a state-of-the-art navigation system. The cornerstone of their solution was the implementation and integration of Apptio Targetprocess as a central platform.

- This new system integrated with Jira for over 500 teams, creating a fleet of automated reporting across the entire portfolio.
- It connected to HR systems, ensuring employee information was always up-to-date and reducing manual maintenance.
- Standardized reporting templates for quarterly business reviews and planning sessions created a common language across value streams.
- OKR tracking was implemented and connected to portfolio epics and projects, providing a bird's-eye view of enterprise-wide progress.
- Financial data was integrated to provide visibility into "cash cost per team" and linked to work execution, maintaining data sensitivity by rolling up user-level cost data to the team level.
- Data updates were automated on weekly or monthly cycles, minimizing ongoing maintenance requirements.



## Sailing Out of the Storm

While the implementation was still ongoing, Citizens Bank was already experiencing smoother sailing:

- Saved an estimated **8-12 hours per quarter** for each of the 80+ value stream owners in reporting preparation alone.
- Better allocation decisions could be made based on data-driven insights.
- Financial transparency improved as they gained the ability to assess cost per team and connect capital spend to work execution for a broader audience.
- Financial data accessibility increased from about **15 people to hundreds** of leadership personnel.
- They gained greater strategic alignment by connecting strategy to execution through OKR tracking and work progress reporting.
- They boosted efficiency by reducing manual effort in data maintenance and reporting across multiple systems.
- Data became more consistent and reliable with the help of automated integrations and standardized reporting templates.





*We're already seeing time savings around our Quarterly Business Reviews and the benefits of all this data being visible to so many more leaders across the org. Having the ability to make decisions based on data everyone has access to is a real game-changer.*

– Sarah M. Ricardo,  
VP Enterprise Transformation



The journey of Citizens Bank offers valuable insights for other organizations embarking on their own digital transformation.

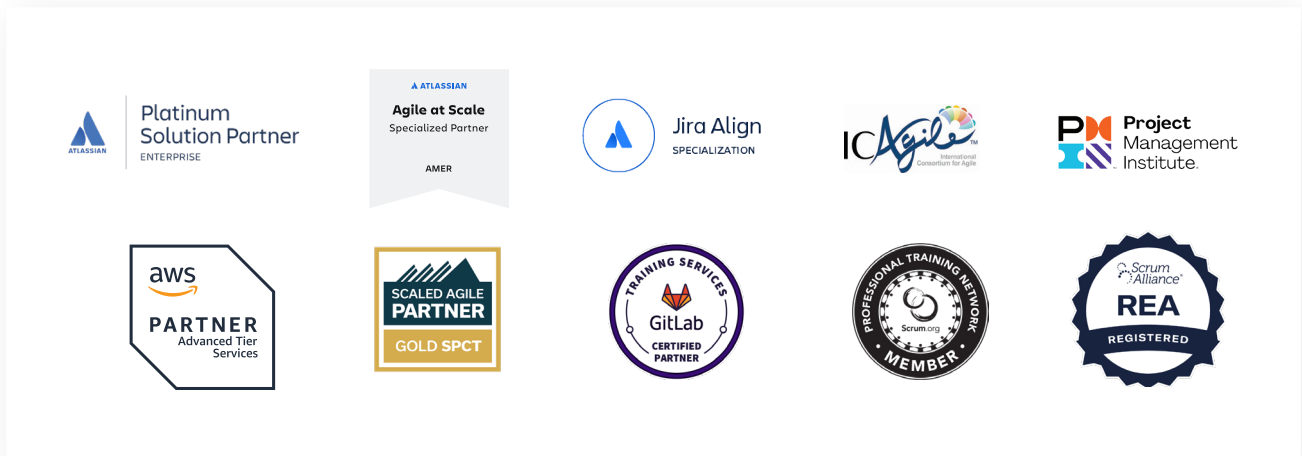
- **Start small, think big:** You can't architect your way into being agile. Start somewhere and be prepared to adapt as you go.
- **Embrace integration:** Breaking down silos and connecting disparate systems can unlock tremendous value.
- **Data-driven decision making:** Having the right data at your fingertips empowers leaders to make informed choices.
- **Continuous improvement:** Digital transformation is not a destination, but a journey of ongoing optimization and refinement.

As Citizens Bank continues to navigate its digital transformation, the benefits are already clear. With Cprime's help, they've charted a course towards greater efficiency, transparency, and strategic alignment. The bank is now better equipped to weather any storm and sail confidently into the future of banking.

Explore Cprime's [Enterprise Technology and Financial Management solutions](#) to see how we can help your organization achieve similar success.

# Cprime Partnerships

With over 50 partners, Cprime is committed to growing mutually beneficial alliances to deliver more value across all of Cprime's Trainings, Products, and Services. [View All Partners](#)



## About Cprime

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Cprime is a full-service global consulting leader in enterprise and product agility, software tooling, and managed services. Cprime's team of experienced practitioners help businesses achieve agility, improve visibility and alignment, speed time to market, and realize significant operational and cost saving improvements.



With over 20 years' experience, Cprime is trusted around the globe to provide strategic and technical consulting, coaching, and training to businesses leading their industry in digital transformation.

Cprime is a Goldman Sachs Asset Management and Everstone Capital Partners portfolio company.

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