



Case Study

Transforming Portfolio Management at a Leading Financial Services Organization in Just 9 Weeks

cprime.com | 877.800.5221 (US) | +44 (0) 203 811 0424 (UK)

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Company Details

Industry: Financial Services

Company Size: 2,500+ employees

Location: England, UK

Cprime Services: [Lean Portfolio Management](#)

Executive Summary

This financial services org needed to enhance portfolio visibility and project delivery capabilities. Cprime developed and implemented their Essential Lean Portfolio Management (LPM) solution, aligned with SAFe®, in just nine weeks. Results included £4 million in cost savings, improved predictability, and enhanced organizational alignment.

When organizations evolve their strategic planning processes, their portfolio management capabilities need to evolve as well. This was the opportunity facing this leading financial services organization in the UK, until a pioneering approach to Lean Portfolio Management transformed their delivery capabilities.

When Portfolio Scale Outpaces Process

Like many organizations, our client had historically approached their corporate planning with flexibility rather than clear commitments. “Previously, the corporate plan was more of a directional document than an execution roadmap,” explains one project leader. This approach shifted when a new CEO arrived with a vision for more structured delivery and began asking for specific execution timelines.

The organization recognized opportunities to improve portfolio visibility and team alignment. Their existing change prioritization process needed modernization, and departments had opportunities to enhance collaboration. Most importantly, they sought better ways to track delivery and value.

After evaluating seven to nine different companies, the company chose Cprime because they felt we truly understood the issues they were facing and were going to guide them to success rather than hand them a generic PowerPoint deck and walk away.



Essential LPM: A Strategic Approach to Portfolio Management

Recognizing that traditional LPM implementations had become increasingly complex, Cprime developed a streamlined, essential approach. This new methodology, piloted in partnership with our client, focused on implementing core LPM elements in just nine weeks.

The solution included:

- A comprehensive two-day LPM training event
- Current state portfolio evaluation
- Value stream identification workshops
- Strategic theme creation
- Portfolio canvas and vision development
- Epic identification and prioritization
- Implementation of a Portfolio Kanban system
- Regular portfolio sync meetings

Following the initial nine-week implementation, Cprime guided the company through SAFe PI Planning, successfully rolling it out across nine Agile Release Trains (ARTs) involving 450 people within six months.



We saved them four million pounds within six weeks just because they now have full visibility into the work being done, how and why it's being funded, and how it aligns with high-level strategy.

– Gez Smith

Cprime LPM Consultant and SAFe Fellow



The Results

The impact was immediate and substantial. Within the first two months, the client identified opportunities to optimize their portfolio that resulted in £4 million in cost savings. “We got everything in the same place and could make more informed decisions about our investments,” one stakeholder reported.

The organization experienced significant improvement in project predictability, with ARTs consistently achieving their delivery commitments after the first PI Planning. Teams developed increased confidence in their planning and execution capabilities.


The benefits were so clear that they decided to retain a dedicated space for PI Planning though it cost £50,000 annually in taxes, determining that “the conversations that we’ve had have already paid for the space just through the alignment.”

Most notably, the organization achieved comprehensive portfolio visibility. As one leader noted, “This is the first time we can actually see across the organization what all of the teams are working on.”

Could Essential LPM Work for Your Organization?

Cprime’s Essential LPM approach demonstrates how portfolio management opportunities can be addressed through a focused, streamlined implementation. For organizations looking to enhance portfolio visibility, project delivery, or organizational alignment, Cprime’s proven methodology offers a path to efficient, sustainable transformation. Like our client, we’re confident your organization can achieve meaningful results through a structured, well-planned implementation with the right approach and expertise.

Moving forward, the client now has a strong foundation for organizational transformation, providing the opportunity for even greater results through continued development of these LPM capabilities.

Explore Cprime’s flexible and practical approach to **Lean Portfolio Management** to achieve similar results in your organization! 

Contributors



Rick Barker

Cprime LPM Consultant and SPCT



Gez Smith

Cprime LPM Consultant and SAFe Fellow

About Cprime & Company

As full-service consultants leading at the dynamic intersection of product and platform innovation, Cprime empowers organizations not only to accelerate change but to embrace it as a catalyst for strategic growth.



With a proven track record as a trusted global consulting partner backed by Goldman Sachs and Everstone Capital, we go beyond traditional consulting and guidance to help clients anticipate market shifts, seize opportunities, and proactively shape their industries. Together, we drive innovation, foster flexibility and adaptability, and ensure sustainable growth amid continuous change to exceed customer and market expectations.

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