Implementing Lean Portfolio Management

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Introduction

Deepak Sevak
Director, Program Management Office (PMO)
Discover® Global Network

Deepak has 15+ years of IT and business operations experience including significant leadership responsibilities within consulting and industry for complex global enterprises. Deepak has held roles leading global transformations within manufacturing, pharmaceutical, insurance, and banking industries. He has proven expertise in delivering innovative and agile technology solutions that align with strategic business vision. He is currently part of the team driving full scaled agile adoption and enterprise transformations at Discover Financial Services.

Sandy Lynn
Senior Business Change Agent
Discover® Global Network

Sandy has 13+ years experience in Program Management at Discover®, enabling new tech partnerships and digital capabilities. Prior experience includes leadership roles in business intelligence and marketing for consumer-packaging and industrial supply companies. Currently on assignment as Sr. Business Change Agent deploying an enterprise-wide initiative to transform our culture towards lean-thinking and adoption of agile approach to solutions.
About Discover Financial Services

A Leading Direct Bank and Payments Partner

U.S. Card Issuance
- $73 billion in card receivables
- Leading cash rewards program

Lending and Deposits
- $45 billion in consumer deposits
- $16 billion in personal loans and private student loans
- Home equity installment loans

- $163 billion in volume\(^1\)
- 15+ network alliances

- $34 billion in volume\(^2\)
- 120+ licensees
- 190+ countries/territories

- $180 billion in volume
- Approx. 4,100 Issuers
- Approximately 2.1 million ATMs in 140 countries

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Balances as of December 31, 2018; pre-tax profit and volume based on the trailing four quarters ending 4Q18; direct-to-consumer deposits includes affinity deposits

\(^1\)Volume is comprised of Proprietary Network Volume and Network Partners

\(^2\)Volume is derived from data provided by licensees for Diners Club branded cards issued outside of North America and is subject to subsequent revision or amendment
Introducing work for system development

The process before …

Request Submission

Review and Ranking

Backlog Management

Description
Business Value

Impact Assessment
Alignment

Prioritize
Plan

Requestor

Executive Leadership

Agile Release Trains

Local prioritization
Targeted Solutions

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Driving Business Agility through Portfolio Management

…has now matured over time

Request Submission → Opportunity Assessment → Solution Discovery → Scoring and Prioritization

- **Alignment**
  - Scope
  - Why
- **Value**
  - Time
  - Risk
- **Options**
  - Impacts
  - Launch Needs
- **Validate**
  - Score
  - Rank

- **Requestor & PMO**
- **Subject Matter Experts**
- **Business Leads & IT Architects**
- **Executive Leadership**

Transparency of work
Value-based solutions
Business alignment

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Assess the opportunity

Determining the cost of delay

- **Business Value**: Relative value to customer
- **Time Criticality**: How quickly delivery is needed
- **Strategic Value**: Relative to risk and alignment to goals

**Input to**
Weighted Shortest Job First (WSJF)
Determine the right solution

Identifying the options and impacts to deliver expected value

Options
- Buy
- Build
- Outsource

Impacts
- Operations
- Client Support
- Go-to Market

Job Size for WSJF
Recommendations
Establishing priorities for delivery pipeline

Recommended Initiatives → Prioritized List of Initiatives

- Validate
- Score
- Rank

Executive Leadership

Delivery Planning

- PI Planning
- Go-to-Market
- Operational Readiness

Business Functional Teams
Agile Release Trains

Recognized Business Value

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**Implementing a lean portfolio management system takes patience and vision**

- Applying processes consistently
- Addressing increasing complexity of requests
- Adapting to organizational changes

Desired results
Thank you!

Questions?