



Legal & General Project Portfolio Analysis & Reporting

Key Metrics

- Change Delivery portfolio of circa 130 in-flight projects spanning multiple disciplines and functions.
- 8 major programmes
- 3 month engagement
- Time to baseline the first iteration of newly created portfolio reporting - 4 weeks

Background

- The Group Technology function had gone through a significant period of change following internal integration and the creation of new vertical teams.
- COVID and a change in working practices introduced greater complexity in the environment to which Group Technology was operating.
- Consequently certain projects in the portfolio were experiencing challenges and protracted delivery timescales, adversely impacting the experience of internal customers.
- A requirement to increase the level of control, tracking and reporting of the overall Group Technology change portfolio was identified with limited capacity to carry this out internally.

Altus Engagement

- Altus were commissioned to conduct a Portfolio level review and provide L&G Group Technology with the ability to oversee, manage and report on their deliveries across the change portfolio with much greater clarity.
- There was a requirement for heightened insight and creation of a roadmap to better visualise improvements to Customer Experience outcomes, both achieved and in plan to deliver.
- Altus deployed a small, high performing team of Programme Delivery and Technical Consultants with extensive experience of Project Portfolio Management and reporting up to and including Enterprise and Executive level.
- The engagement deployed methodology from the Altus Project Management Office service, part of the APEX delivery framework.
- All Improvements were rolled out, embedded and handed over within 3 months.

"Altus brought a high degree of experience and a collaborative approach to very quickly analyse Group Technology's change portfolio and provide Executive level reporting with actionable MI. This was underpinned by an automated, easily maintainable reporting dashboard."

Mark Bleackley
Change Portfolio Director
L&G Group Technology

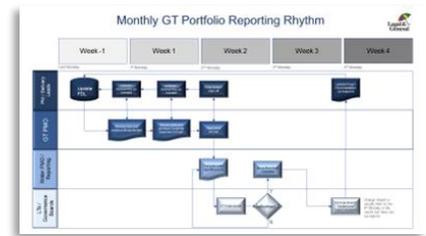
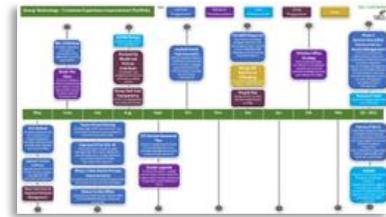
Approach & Actions

- 1. Gather Information** - Create and populate list of all current projects with RAG status and core details (Portfolio Demand List)
- 2. Analyse, Categorise and Baseline** – Identify and rank key Customer Experience Improvement change activity for reporting
- 3. Report & Recommend** – Produce project portfolio dashboard and Customer Experience Improvements Roadmap (Plan on a Page)
- 4. Perform Assurance Audit** – Rapid first pass assurance audit of production of project collateral across the whole portfolio and assessment of information flows
- 5. Report & Recommend** – Production of enhanced Plan on a Page and simplified / automated Change Framework Gating Checklist to increase adoption
- 6. Handover New Processes to BAU** – Train L&G resource to manage ongoing reporting activity as BAU including production of process notes



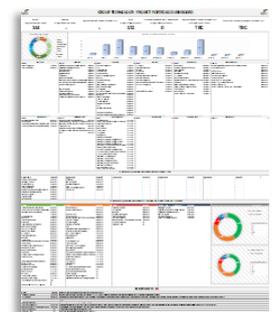
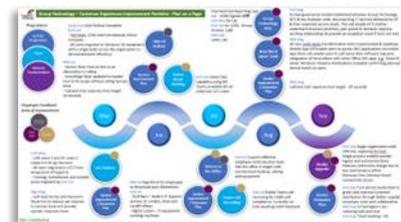
Addressing Challenges At Pace

- As reporting had previously been undertaken at the programme level there was a need to quickly construct a Portfolio Demand List with the associated status for all Group Technology Initiatives – this was achieved in 3 weeks
- An Assurance Audit of the production of project and programme collateral across Group Technology was requested mid-engagement – this was delivered within 4 weeks and resulted in further recommendations for improvement that were taken forward
- Improvements to the Group Technology Change Framework Business Processes e.g. a simplified and automated Gating Checklist were also delivered, including a SIPOC (Suppliers Inputs Process Outputs Customers) diagram within 2 months of the engagement commencing



Key Outcomes Delivered

- ✓ List of all projects created and populated (Group Technology Portfolio Demand List)
- ✓ Initiatives categorised against Customer Experience Improvements and Change Board level requirements
- ✓ Customer Improvements Roadmap created and shared with Exec members across wider L&G Group
- ✓ Project Portfolio Status Dashboard created with process for active management
- ✓ First pass assurance audit for all major programmes undertaken
- ✓ Simplified gating checklist produced
- ✓ Change Management Reporting rhythm SIPOC Diagram produced



“A step change capability in reporting was created, rolled out and embedded in short timescales to a high quality. This enabled us to identify and report on key initiatives across the Group Technology Portfolio on an ongoing basis.”

Mark Bleackley - Change Portfolio Director – L&G Group Technology

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