



# AGILE FINANCE TRANSFORMATION

Accelerate the speed and quality of your Finance Transformation by adopting agile development principles



## WHAT IS AGILE FINANCE TRANSFORMATION?

Taking the best from the Agile world.

### TYPICAL CHALLENGES IN TRANSFORMATIONS

- Multi-year static plans that are not responsive to changing dynamics in the business environment and stakeholder needs.
- Simultaneous large-scale projects with long duration and pay-offs that will materialize in the distant horizon kills the momentum and energy around the transformation.
- Only a limited part of the Finance team is working on development – business as usual is the norm.

### AGILE FINANCE TRANSFORMATION

- Finance should not “go fully agile” but can leverage many of the processes and dynamics from Agile to improve the transformation.
- Agile transformation comprises
  1. A common and vivid aspirational dream.
  2. A more agile approach to project portfolio management focused around 1-3 month planning sprints.
  3. Continuous improvement initiatives in operations.



### BENEFITS

How will an Agile transformation benefit you?

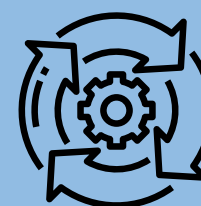
#### BETTER EXECUTION

Fewer projects with more focus and a continuous delivery of short-term wins.



#### IMPROVED EFFICIENCY

Less program bureaucracy and focus on the sum of small improvements across the organization.



#### ADAPTING FASTER TO CHANGING NEEDS

Priorities and resource allocations are assessed every three months.



### OUR PEOPLE

Leading experts with long experience in Finance transformation



#### MICHAEL BÜLOW

Partner & CEO in BPI  
+45 29170298



Formerly responsible for Finance Transformation in Deloitte. Designed and implemented transformations in +10 organizations.



#### ANDERS LIU-LINDBERG

Partner & COO in BPI  
+45 29266410



Formerly responsible for the finance transformation program in Maersk and thought leader within Finance Transformation.



#### NICOLAI LACHMANN

Strategic partner to BPI  
+45 30935432



Former partner in Deloitte and leading expert in Agile and how to apply these principles in the context of Finance.

# THE THREE PILLARS OF AGILE FINANCE TRANSFORMATION

*BPI can support you with a simple and practical implementation.*

## THE THREE PILLARS

## CHARACTERISTICS.

## EXAMPLES

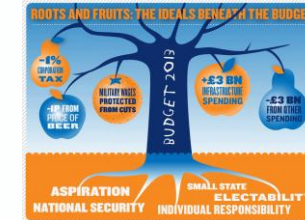


### A VIVID AMBITION

A clear and inspiring aspiration for all to follow.

Leadership must define and communicate a compelling vision that will inspire and align all employees.

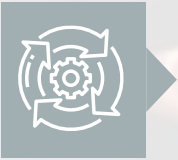
With a clear direction, empower your employees to work on how to realize the vision.



Make the ambition visible



Make the ambition concrete and simple for employees

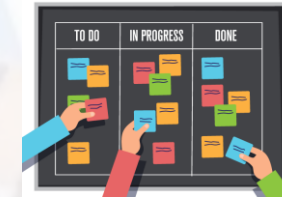


### LEAN OPERATIONS

A one percent improvement every day makes you 37 times better in a year!

All employees should continuously focus on making small step improvements.

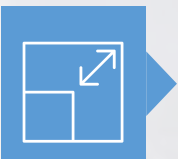
We recommend implementing a structured approach, where all employees are encouraged/expected to identify and implement one improvement every month.



Use Kanban Boards to capture ideas and track progress



Basic training in simple Lean Principles to employees.



### AGILE DEVELOPMENT

Agile program management centered around development sprints

All projects and initiatives are planned and prioritized in three-month sprint intervals driven by PMO/Leadership.

All projects must deliver a “workable product” which benefits users within the three-month sprint.

Rigid status reporting is replaced by regular stand-up meetings between PMO and project team.



Leverage Ceremonies from Agile framework



Use launches to promote successes to rest of organization.