

## > Case Study

How a Fintech Bank uses Plandek to reduce lead times and drive improvements across their SDLC metrics





# 01 Introduction

A pioneering neo-bank has revolutionized the financial services landscape through its innovative all-in-one end-to-end digital approach. They offer the most advanced digital banking and payments solutions across consumers and enterprise segments in their country via a top-rated finance app, and leading merchant acquirer and payments processing business. They are currently the number 1 digital banking app in their country in terms of monthly users.

*“We are building the most comprehensive financial services ecosystem in the country, empowering consumers and enterprises to thrive in the digital economy. We are redefining how banking is done here.”*

In this case study, we will cover why and how the fintech employed Plandek to drive their software delivery, using SDLC metrics to track and monitor progress for continuous improvement. We'll explore how they were able to see vast improvements across their teams shortly after implementing Plandek. The results below include:



**Lead Time** decreased up to **78%** | **23-day** improvement



**Cycle time** decreased up to **76%** | **15-day** improvement



**Bug resolution** time down by up to **93%** | **23-day** improvement



**Estimation accuracy** increase of up to **27%**

We at Plandek conduct a quarterly benchmark exercise where we weigh our clients against industry-defined benchmarks, and as of Q1 2024, they were our top performing client. Find out how they achieved this below!

The fintech is well placed to provide a unique perspective when it comes to building a culture of continuous improvement with SDLC metrics. When we started our working relationship, it was clear that they were quite mature in their use of data (you will see evidence of this throughout the case study), but they were still able to recognize room for growth with Plandek.



## 02 The Plandek use case: why did the Fintech need a software engineering insights tool?

The fintech previously built their own internal development platform (IDP) which is still in operation today; they use this to track key performance indicators (KPIs) with their teams. As this is their tool, they benefit from the freedom of defining their own metrics and what constitutes 'success'.

**?** This is where you might be asking yourself: **So why do they need Plandek?**

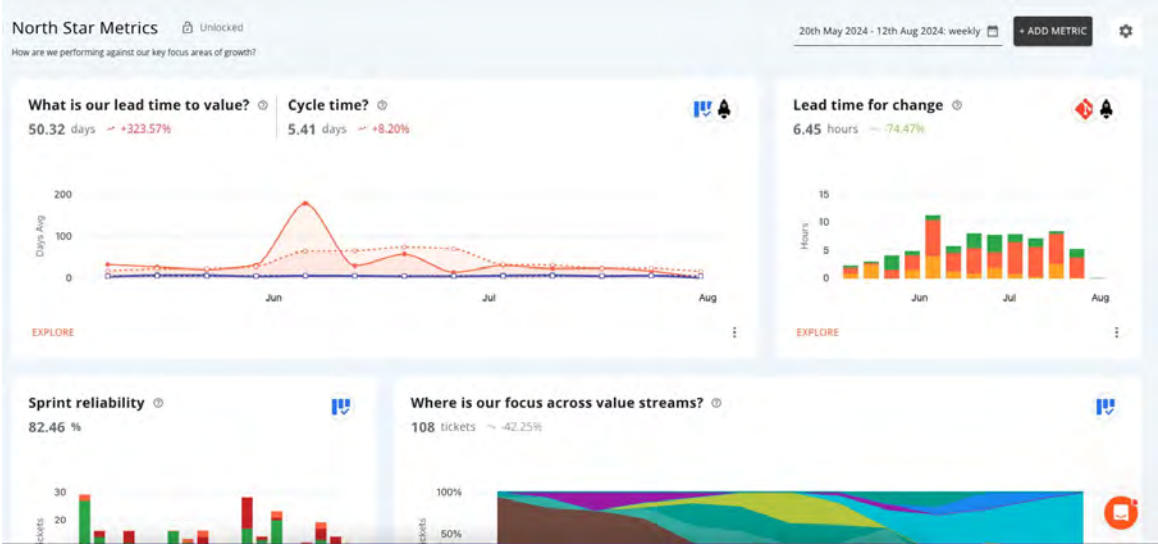
The fintech's IDP is self-service - they require their teams to update and maintain their data, and they have an acting PMO to oversee the project. When they first started to explore Plandek and our product offering during the pilot phase, they outlined how their IDP meets the purpose of reporting on the current state of play, but it doesn't provide actionable insight. To elaborate, they can see how they're performing but not how to improve; this is where Plandek comes in.

During the pilot phase, the fintechs success criteria contained the ability for Plandek to lay agnostically on top of the client's workflow without disrupting their teams. In addition, the client also wanted to be able to build the metrics they already had within their IDP to test Plandeks data validity i.e. do / can our metrics align with theirs?

The validation exercise was a success, and they were happy with Plandeks proof of concept. They then wanted to see what value Plandek could add beyond their IDP metrics.

We focused on Plandek's highly customizable features and configurability; its why many clients choose Plandek over competitor platforms. Our industry-leading configuration allows users to interrogate their own data to surface actionable insight through several different filters, breakdowns, and settings within the metrics. The fintech's internal reporting, as mentioned above, was static and required manual input to maintain and move forward, this meant their focus, effort and time was split from creating value for their end users. Plandek's automated data gathering, and ease of use really helped alleviate this, as the reports they needed were readily available, and always up to date. The aforementioned metric configuration also allows the fintech to build on their two-dimensional reports; they can drill into areas of their software delivery lifecycle (SDLC) to highlight bottlenecks, outline inefficiencies, and spot areas for improvement.

### An example of the Fintech's IDP metrics built in Plandek



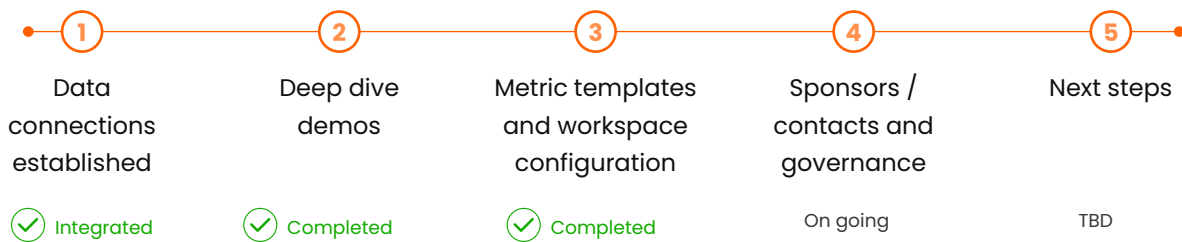


## 03 How did the fintech find the implementation of Plandek?

Following a successful pilot, the fintech scoped out their engineering function at 400–500 intended Plandek contributors. However, due to budget constraints they decided on progressing with a staggered approach. This approach was an initial 100 license deal for 1 year, which would be reviewed quarterly to ensure the tool was being adopted long term and utilized adequately. Then come the time of renewal they would potentially revisit the budget for a full rollout depending on Plandek’s impact.

The fintech were proactive in their efforts to implement Plandek and complete the below ‘roll-out lifecycle’, which allowed them to see value instantly.

### Roll-out lifecycle



1

In step one, we configure all of the necessary data connections from the fintech’s source tools which establishes end-to-end visibility of a client’s SDLC immediately.

2

In step two we give a deep dive demo to a client’s teams in which we cover all of the functional aspects of the tool, so the intended users are confident with how to configure the product for themselves. In this demo, we also touch on the educational side of Plandek where we show from our experience how to interpret the SDLC metrics and the possible use cases available. This is crucial for clients as it portrays the ‘art of the possible’ with Plandek, it shows them the journey they will go on when it comes to being data driven.



3

For step three we build a set of bespoke metric dashboard templates which reflect a client's internal gauge and success criteria. This means during the onboarding phase all of a client's users are interrogating the same visuals allowing them to have scalable conversations and 'pull in the same direction'. We have found that this shared learning approach aids engagement as people quickly become comfortable with the product. They can then take this learning and branch out by building their own dashboards and SDLC metrics. This is the ultimate goal for clients, they want their users to seek answers to their own questions with the metrics, and they want their teams to drive their own improvement and delivery. An example of this could be 'We struggled to deliver what we committed to in this sprint, let me use Plandek to interrogate our data and find out why so we can take actions to improve in our next sprint.'

4

Step four is setting up governance calls with all levels of the organization as this provides a forum for top-down to meet bottom-up. The client's senior stakeholders who are sponsors of Plandek can use this platform to reaffirm their initiative and vision for the tool while team members can ask any necessary questions. These calls also aid the educational journey discussed in step two, as we use our experience to help clients interpret their SDLC metrics (see below for example).

#### > Example

Let's say while setting up your metrics we see that in your lead time, you have a bottleneck in your backlog statuses such as 'to do', 'open', or 'awaiting development', we can relay this information, so you know what to look for next time. We can also help you plan recourse here to alleviate these bottlenecks, in this example, as it's related to their backlog process let's revisit this element of the SDLC:

- How often do we groom our backlog?
- Are we refining tickets in a timely manner so they are sprint-ready?
- Do we set priorities so the team knows what tickets to pick up first?
- Do we define a ticket's success criteria clearly enough?
- Do we have the right capacity and skill set in our team to meet the needs of the project?

Here you can see Plandek surfaces insights that enable clients to have the relevant conversations needed to improve their delivery. However, context is needed here to convert these black-and-white data points into reality, the likes of scrum masters or leads are best versed in this area as they will understand what's at play within their team's dynamics so can take these insights and make them actionable.

5

Step five, is more free form, clients can decide on the agenda and cadence of meetings they would like going forward, Plandek can also provide user engagement statistics every week and quarterly business reviews, etc. Plandek can be as hands-on or hands-off in this journey as the client requires.

The fintech, based on our recommendation, is also establishing a 'center of excellence' (COE) as part of their next steps; they're going to use their most active teams to aid the adoption of Plandek. This will entail a train-the-trainer approach i.e. Plandek will provide in-depth training to these teams, so they can then train other teams, reducing the channel of communication and time it takes us to add value. They will operate as an internal support system and advocate of the tool, facilitating educational sessions allowing the whole of the fintech to get the most out of Plandek.





# 04 The results: how did Plandek impact the fintech's engineering performance?

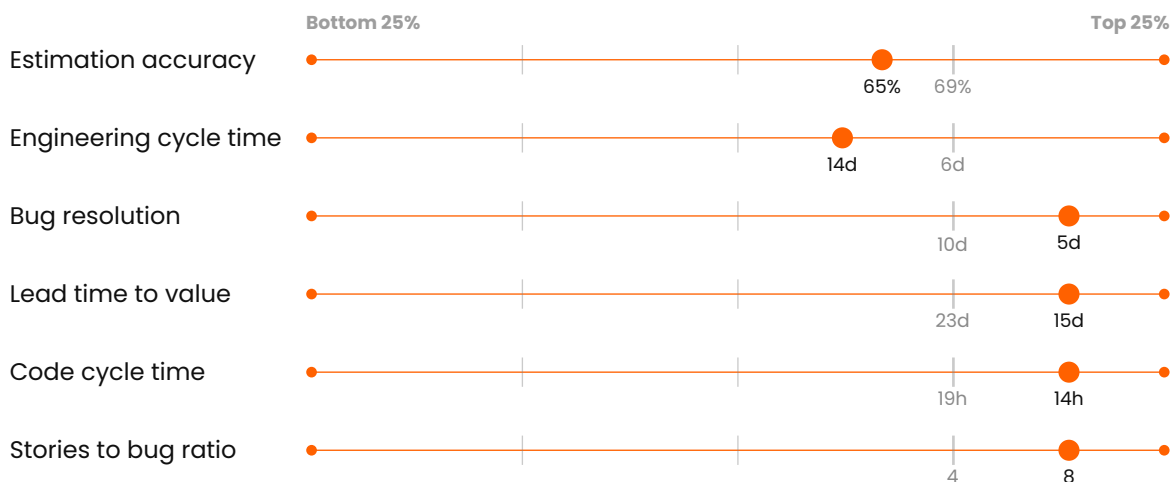
The first notable impact was the change in ways of working for the fintech's teams. Previously, they produced a report for their IDP which provided a static viewpoint of how they performed within a given time period; it was somewhat of a box-ticking exercise for senior stakeholders. This meant the teams didn't gain any guided direction from the reports in terms of how or where to improve. Their engineering teams have now intertwined Plandek's metrics with their workflow by reviewing them in their agile ceremonies such as daily stand-ups, retrospectives, and planning meetings. This positive behavioral change has meant the fintech now operates from a place of proactiveness rather than reactivity, they spot material risks as and when they arise meaning they can promptly address them rather than deal with them after the fact once they have transpired.

The teams now see data as a primary driver in their success rather than supplementary to it, they are now regularly thinking about how engineering practices lead to positive business outcomes.

The fintech's teams now also spend far less time creating these reports and more time working on delivering value to their end users due to the tool's automation.

Below you can see how the fintech at an organizational level compares to other Plandek customers under several key performance indicators.

## An example of the fintech's Plandek benchmarks





Weighting the fintech's above benchmarks against their Plandek penetration ranking (engagement / total users) shows they're currently our best-performing client. Aiding this ranking is the fact that the fintech has consistent executive sponsorship and are in our top 50% for client engagement, their top users sign in multiple times a week to review their metrics.

We took a look at these most active users and their team's data to see how Plandek is impacting them on a more granular level. We saw an even distribution of activity across all workspaces however a strong positive correlation could be seen between the most active and the most improvement made.

### > 1st most active workspace

*Data based on the last 12 weeks*

Metrics	3m prior	Today	Improvement
Lead time to value	85.31d	29.87d	-60.56%
Engineering cycle time	42.14d	18.26d	-69.98%
Bug resolution time	42.79d	31.96d	-43.81%
Estimation accuracy	86.11%	87.35%	+1.16%

### > 2nd most active workspace

*Data based on the last 12 weeks*

Metrics	3m prior	Today	Improvement
Lead time to value	38.38d	15.73d	-77.68%
Engineering cycle time	31.16d	14.37d	-75.81%
Bug resolution time	31.68d	5.32d	-93.19%
Estimation accuracy	57.77%	73.54%	+27.29%

### > 3rd most active workspace

*Data based on the last 12 weeks*

Metrics	3m prior	Today	Improvement
Lead time to value	79.22d	40.49d	-48.89%
Engineering cycle time	24.06d	7.49d	-68.97%
Estimation accuracy	82.04%	84.19%	+1.16%

(This team doesn't work with bug's therefore there is no bug resolution time)

\*active = this workspace has the most users visiting it



## 05 Next steps: how will the fintech continue to improve their delivery performance with Plandek?

Following this success and the demonstrable impact of Plandek, the fintech plans to leverage this momentum and is currently in the process of rolling out Plandek to the remainder of their engineering teams, thereby ultimately replacing their IDP tool with Plandek's insights. Their core focus on outcomes will remain the same, as they underpin the organization's delivery goals over the next financial year.

*"Plandek has been instrumental in helping us understand the key metrics that drive productivity, while providing teams with the autonomy they need to tackle their day to day challenges. It has become a critical part of the tool kit that we use to understand and improve engineering productivity and developer satisfaction."*

**Head of Engineering**

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# About

Plandek is an intelligent analytics platform to help software delivery teams deliver valuable software, faster and more predictably.

Plandek enables technology teams to track and drive their improvement and share understandable KPIs with stakeholders interested in accelerating value creation/improving delivery efficiency. As such Plandek is a key global vendor in the fastest growing area of DevOps known as Value Stream Management.

Plandek works by mining data from delivery teams' toolsets (such as issue tracking, code repos and CI/CD tools), to provide actionable and intelligent insight across the end-to-end software delivery process for users throughout the delivery team - from Team Lead to the CIO.

Plandek is recognised as a top global vendor by Gartner and Forrester and is used by private and public organizations globally to optimise their technology delivery.

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