



Monticello Consulting Group
Portfolio & Program Management



Monticello
CONSULTING GROUP

About Monticello's Portfolio & Program Management Services

Disruptions to Change



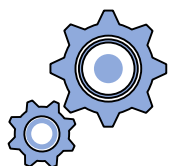
Disruptions from changing financial regulations, technology innovations, and business challenges demand innovative management solutions to deliver real value.

Monticello Methodology



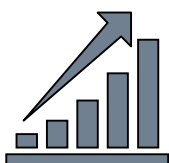
Monticello's Program Management methodology serves as a catalyst for defining, executing and achieving business, technology and regulatory goals with confidence and consistency.

Flexible Framework



Monticello's frameworks are flexible and tailored to the bespoke needs of our clients and remain oriented to delivering value and consistently reaching milestones with innovative and technologically focused ideas.

Sustainable Success



Monticello's work is not complete until an organization is positioned to succeed in a sustainable way. Our team brings a continuous drive for innovation, improved financial performance, and accelerated speed to market.

Define Vision

Define Value Streams

Design, Develop & Deploy

Assess Results

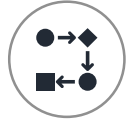
Innovate & Accelerate

Monticello's Program Management Capabilities

Monticello's program management framework is distinctly positioned and leverages over fifteen years of investment in our portfolio & program management methodology and is supported by our thought leadership and financial services industry expertise.



Monticello Consulting Group has a structured approach to pinpoint the right program methodology



Proven program initiation model customized to fit a client's organization and stakeholders and enhanced by cultural mindfulness



Enhanced metric development aligned to business outcomes for transparent and effective communication and decision-making including:

- ✓ Key Performance Indicators (KPIs)
- ✓ Key Risk Indicators (KRIs)
- ✓ Data Science / Artificial Intelligence for portfolio tracking and measurement



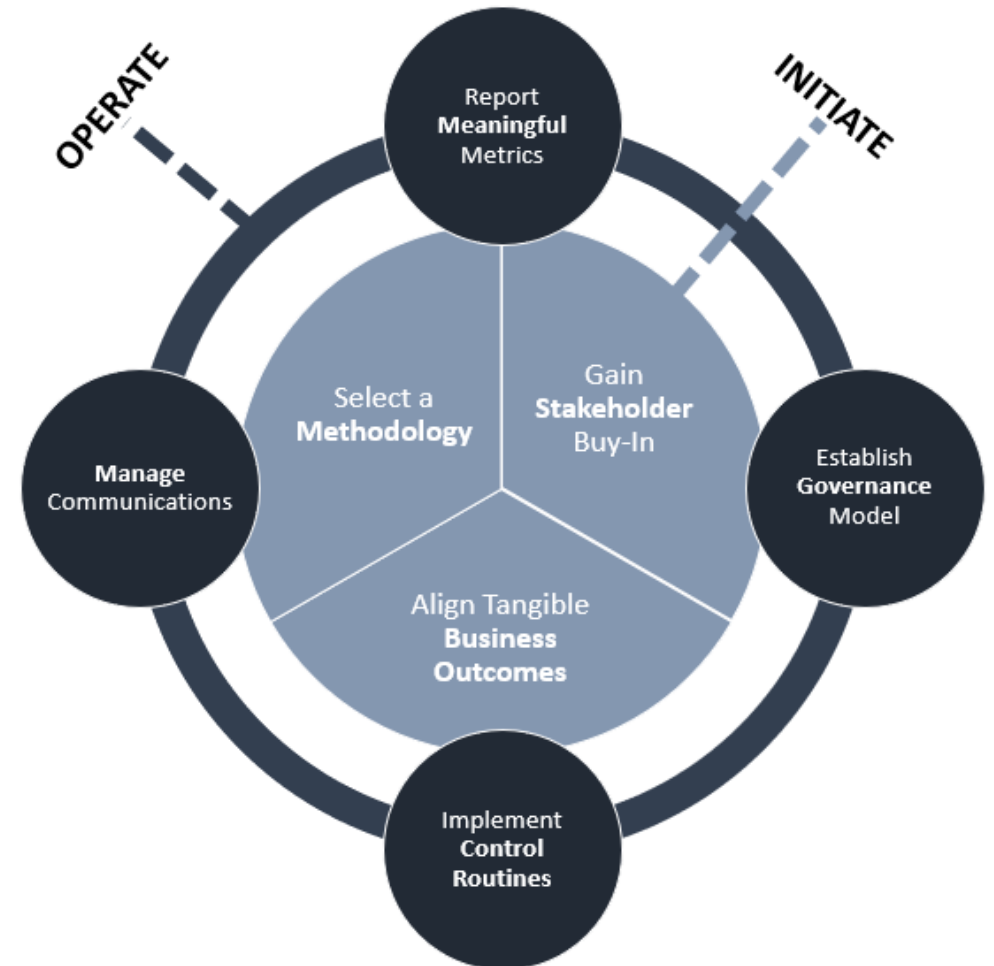
Best practices for implementing automated reporting and project portfolio management (PPM) tool selection



Employ efficient and effective risk management framework to that supports control routines through go-live planning and release execution



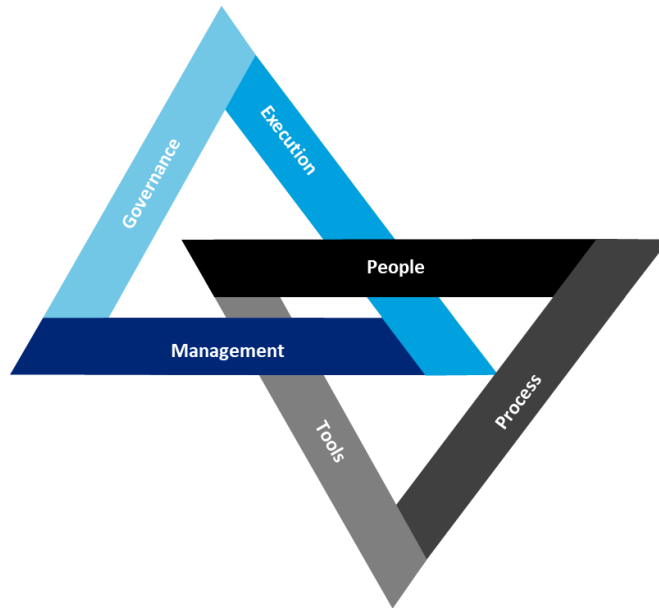
Leverage Monticello's FLEX model framework to implement a lightweight and comprehensive governance model



Monticello's FLEX Model for Implementation Success

Monticello Consulting Group focuses on assessing the core elements inherent in all major programs: **People**, **Processes** and **Tools** in order to customize the **Governance**, **Management** and **Approach** for our clients to meet their business objectives.

Monticello's FLEX™ Model



GOVERNANCE



MANAGEMENT



EXECUTION



PEOPLE

- Sponsors
- Committed members
- CTO/CIO organization

- Change executives
- Project managers
- Line-of-business stakeholders

- Developers
- Scrum teams
- QA/UAT teams
- Integration teams

PROCESS

- Steering committee
- Operating committee
- Corporate program monitoring

- Status updates
- Working groups
- Milestones, RAID items
- Change controls

- Waterfall
- Agile (Scrum/Kanban)
- Six Sigma (DMAIC)
- SAFe Agile/Scaled Agile
- DevOps

TOOLS

- Proprietary PM tools
- Vendor tools
- MS PowerPoint

- Home-grown project management tools
- MS PowerPoint
- MS Excel

- JIRA
- Slack
- VersionOne
- MS Teams
- Asana

Connect with Monticello

When to call...

- ✓ You are aware of market or regulatory change on the horizon and want experienced partners who continually monitor key trends in the financial markets
- ✓ You have decided to embark on a change initiative and need a strategic partner to assist in carrying it through to completion
- ✓ You are seeking skilled consultants who are experienced with Tier 1 bank culture, systems, and processes

Key drivers...

External:

- ✓ Libor transition challenges
- ✓ Digital transformation competitiveness
- ✓ Other regulatory reform regimes (JFSA, EMIR & Basel) are mandating compliance changes
- ✓ Competitive pressures are forcing you to rethink your market strategy
- ✓ Your clients are seeking new products and/or superior service levels that you cannot offer today

Internal:

- ✓ Your business is seeking new growth but is limited by platform constraints
- ✓ Your business is seeking advice regarding organizational change management (OCM)
- ✓ Your business is seeking for program management best practices

Our Experts



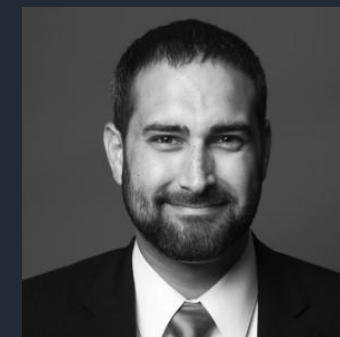
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Case Study: Scaled Agile

Problem

Portfolio Management based on Waterfall principles with infrequent Portfolio grooming and analysis

Analysis

Monticello partnership to analyze and define custom scaled Agile target state to meet client objectives



Scaled Agile Best Practice Alignment

As large financial institutions face increased competition, many have turned to agile software development in search of efficiency. Since traditional Agile was designed for small teams working on smaller projects, scaling Agile to work on complex programs has become a key goal of large organizations.

Monticello is well-positioned to assist your organization on its journey towards scaled Agile. Learn more about how our Agile experts helps clients improve their scaled Agile practices in our [case study](#).

Solution

Monticello implements scaled Agile transformation and achieves steady state

