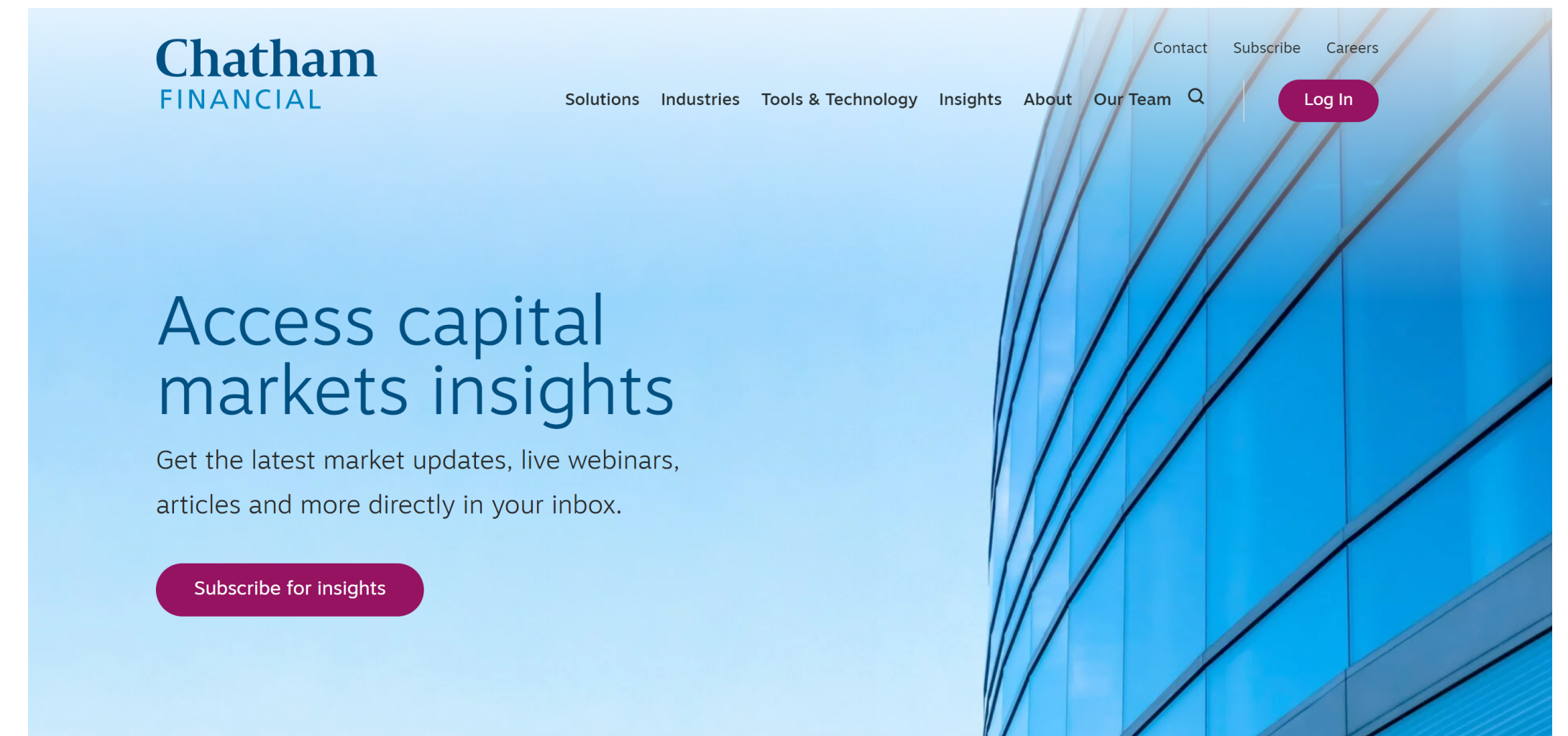


THE
Art & Science

OF DIGITAL PROJECT MANAGEMENT

CASE STUDY: CHATHAM FINANCIAL

How to optimize team efficiency in an environment that's already pretty efficient.



THE CHALLENGE

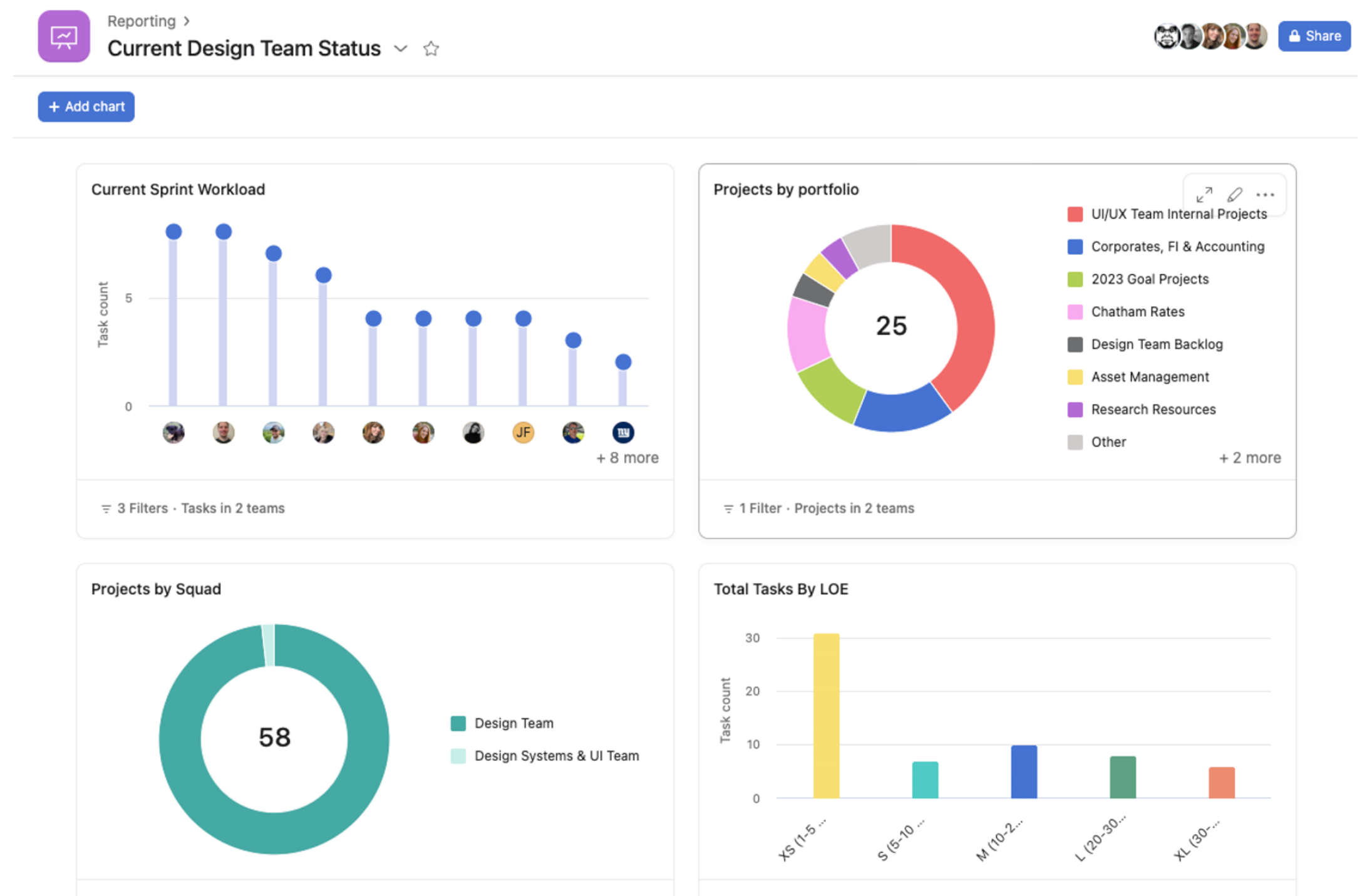
Chatham Financial is a company full of really smart, pragmatic and talented people - and the Design Team was a gold-star representation of that culture. Both the team and the company had grown over the years to the point where they recognized the need for some Operations/Project Management, so I joined on to build/implement a solid practice from the ground up.

So the real challenge here was... there wasn't anything challenging. Nothing was on fire, and while the team struggled a bit with more operational tasks, they did their best to keep a system in place and track their tasks as best they could, for folks that had other stuff they should be doing instead.

THE SOLUTION

KEEP IT SIMPLE

- 1) Work with the Team to develop a solid Design Program.
- 2) Update the Design software stack. The Design System was older, proprietary and hard to manage. The team needed an off-the shelf cloud solution, but couldn't find the time (or consensus) to make the change.
- 3) Start keeping track of everything and implementing some basic best practices.



THE RESULTS

- Created a solid Program in Asana
 - The Design team started using Asana in a better way
 - Created status meeting check-ins with the appropriate teams
 - Increased visibility into resource workload as well as accuracy
 - Began measuring the churn in our overall process and started putting measures in place to help mitigate that

The screenshot shows an Asana project dashboard for 'Corporates, FI & Accounting'. The dashboard is organized into two main sections: 'Accounting' and 'FI (Financial Institutions)'. Each section contains a list of tasks with various columns: #, Name, Due date, Planning Stage, Release Tr..., Task progress, Priority, and UX Lead. The tasks are color-coded by status and priority.

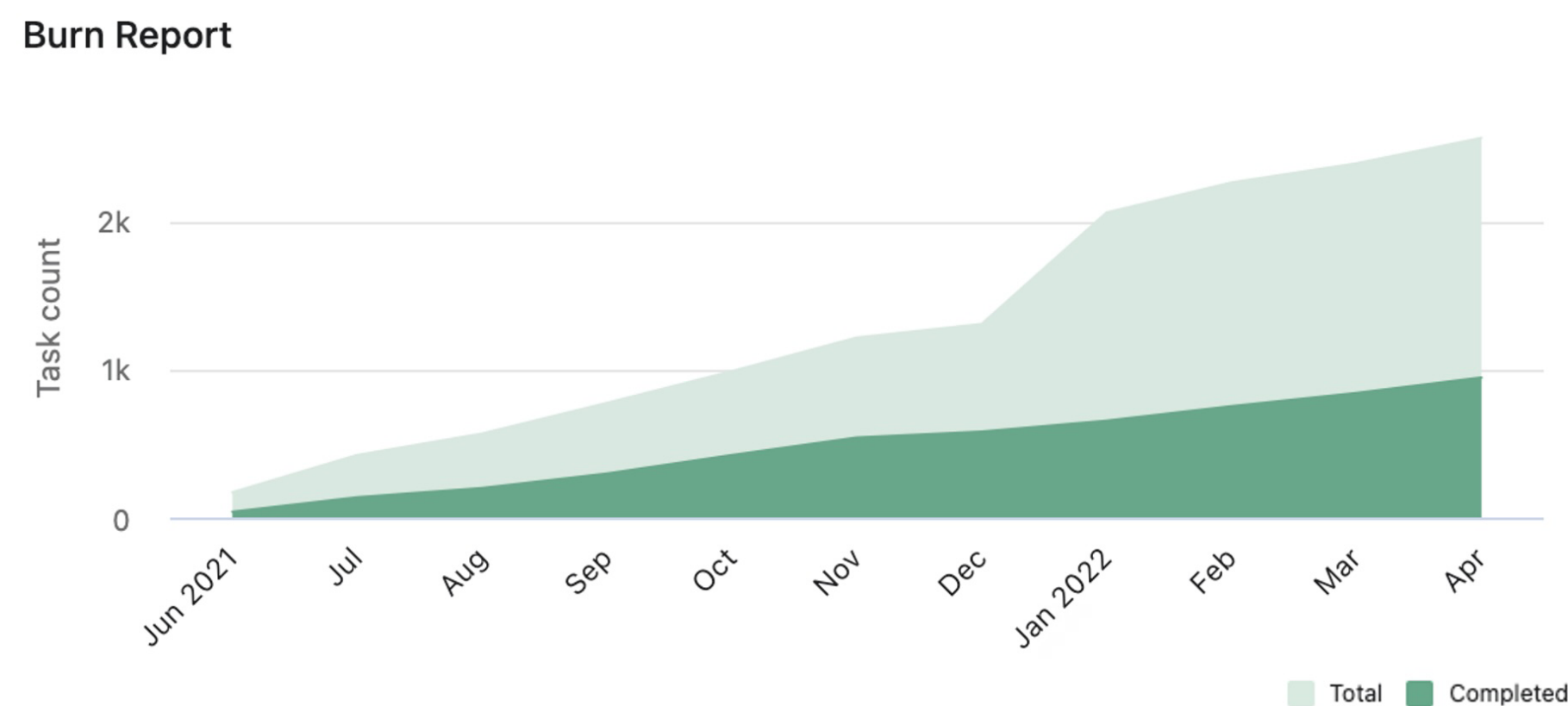
#	Name	Due date	Planning Stage	Release Tr...	Task progress	Priority	UX Lead
Accounting							
1	Month-end Close Orchestration	Apr 8 – Sep 30	Needs scope/planning	R3	0%		
2	Accounting Updates & Enhancements	Dec 31	In Progress	Ongoing	20%	Low	
3	Multi-Settlement CMD OCI Release on Delay		On Hold/Waiting	R2	57%	High	
4	Sponsor-Level Accounting Settings		On Hold/Waiting	R2	60%	Medium	
5	Homepage/Dashboard/Landing Page		Needs scope/planning	TBD	100%	Low	
6	Hedged Item Rate Calibration		Needs scope/planning	TBD	0%	Low	
7	Onboarding JE's		Needs scope/planning	TBD	0%	Low	
8	OB/Acct (status)				0%		
9	OB/Acct (release)				0%		
FI (Financial Institutions)							
1	FI Backlog		In Progress	Ongoing	85%	Low	
2	CH: Pitchbook - Auto-include Breakage grid	Mar 22 – May 24	In Progress	R2	66%	Medium	
3	CH: Borrower docs - Auto-include Breakage grid	Mar 22 – May 24	In Progress	R2	66%	Medium	
4	BSH: Pricing a group of indications	Feb 26 – May 24	In Progress	R2	60%	High	
5	BSH: Accounting Expense Recognition	Jan 24 – May 24	In Progress	R2	70%	High	
6	BSH: Breakage - Non-parallel shocks	May 24	In Progress	R3	42%	Medium	
7	BSH: Portfolio of indications & trades	May 24	Needs scope/planning	R3	0%	Medium	
8	BSH: Trade Creation	May 31	In Progress Research	R3	31%	High	
9	CH: IC - Exposures UI Updates	Dec 4, 2023 – May 24, 2024	In Progress	R3	37%	High	

THE RESULTS

- In the course of a year we upgraded our tool belt by replacing Sketch with Figma, adding Condens for our Research Team, and implementing the use of ZeroHeight for our Design System.
- Creating a slack intake form, building an issue board in Gitlab, and implementing a weekly scrum with the Designs System team along with the new software helped reduce **our Front-end backlog by 40%**.

A little organization, some tracking and reporting, along with some software improvements helped increase overall team efficiency.

2021-2022 (Before)



2022-2023 (After)

