

Delivery Coaching



The Challenge

When we kicked off our first engagement with a leading financial services firm, we knew we were stepping into a complex environment. The client had an existing end-to-end technology-driven service that helps financial institutions and lenders streamline and manage the cancellation and refund process for ancillary aftermarket products (e.g. extended services contracts) already underway—an ambitious program with multiple internal and external dependencies, a large delivery team, and high expectations for revenue growth.

Our role was clear: assess the current delivery process, identify improvement opportunities, and build a coaching plan to help the team deliver more effectively.

The client's delivery model was struggling to keep pace with the demands of the program. Sprint commitments were inconsistent, releases were unpredictable, and planning lacked the structure needed to support a team of this size. Misaligned priorities and unclear role definitions were creating friction, and the roadmap wasn't being updated to reflect reality.

We weren't there to point fingers. We were there to help.

The Solution

We began with a structured Inception phase—our proven method for understanding the current state, defining success, and aligning on a path forward. Over the course of six weeks, we embedded with the team, observed ceremonies, facilitated planning sessions, and coached on process improvements.

Our coaching focused on:

- **Sprint Planning & Commitment:** Helping the team break down stories into sub-tasks, estimate effort, and commit realistically.
- **Roadmap Management:** Establishing a centralized source of truth and aligning product leaders on priorities.
- **Team Structure & Focus:** Encouraging initiative completion over parallel starts to reduce context switching.

- **Culture & Communication:** Fostering a collaborative environment where ideas could be shared freely.

The Results

By the end of the engagement, the team had a clear definition of done, a refined sprint planning process, a roadmap that reflected actual delivery capacity, and was beginning to operate with greater confidence and cohesion.

Most importantly, the client had a plan—and the tools—to continue improving long after our engagement ended.

We didn't just coach. We planned. We listened. We adapted.

Our Inception model is designed to deliver value fast, but it's also built to last. By focusing on measurable outcomes and aligning stakeholders early, we helped this client turn a struggling delivery model into a scalable, agile engine.

That's the Clientek way.