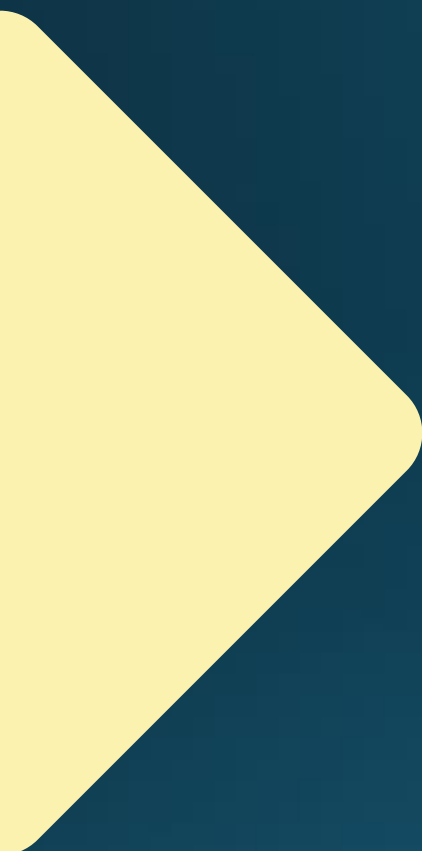




# Quarterly Business Reviews (QBRs): Bridging Governance and Agility

eu-LISA Industry Roundtable June 2025

Building Better Government Software at Scale

A large, yellow, right-pointing arrow graphic that is partially cut off on the left side of the frame.

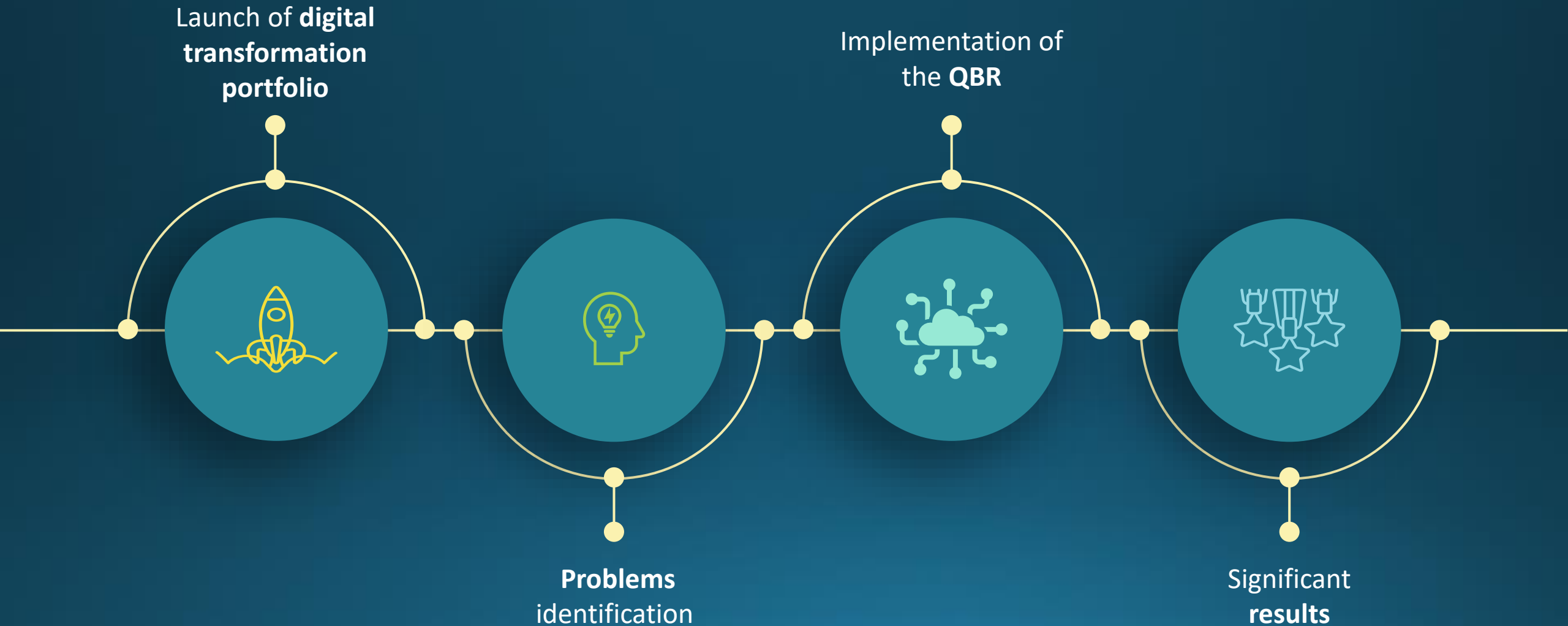
*How many of you have worked with multiple teams or departments trying to 'be agile' at the same time?*

# ABOUT ME

## Anamelia Morales

- Agile Transformation Leader
- 10+ years leading agile-driven change
- Background in business and innovation
- Experience in banking, insurance & logistics
- Focused on scaling delivery, data-driven decisions, and value creation

# REAL CASE



# CONTEXT



Bank company:

- ✓ Operating in **9 countries**
- ✓ Retail banking, corporate banking, and fintech
- ✓ Scaled Agile adoption was underway throughout the organization.

Launched a **digital transformation portfolio** (> 40 strategic projects)



Integration of open banking solutions with **multiple fintechs**



**Automation** of critical processes



Compliance with new local and international **regulatory requirements**



Development of **regional digital products**

# PROBLEMS



## Main problems:

01

### MISALIGNMENT ACROSS COUNTRIES

Different regulations, operational policies

02

### FRAGMENTED ECOSYSTEM: SILOED TEAMS & VENDORS

High levels of friction and cross-dependency

03

### PROJECTS WITH SIGNIFICANT DELAYS

More than 60% of the strategic portfolio

04

### INSUFFICIENT DATA & INCONSISTENT INSIGHTS

Lacked clarity on shared objectives

***“We need a way to deliver at speed —  
without losing control or compliance”***

# OUR SOLUTION: The QBR Approach

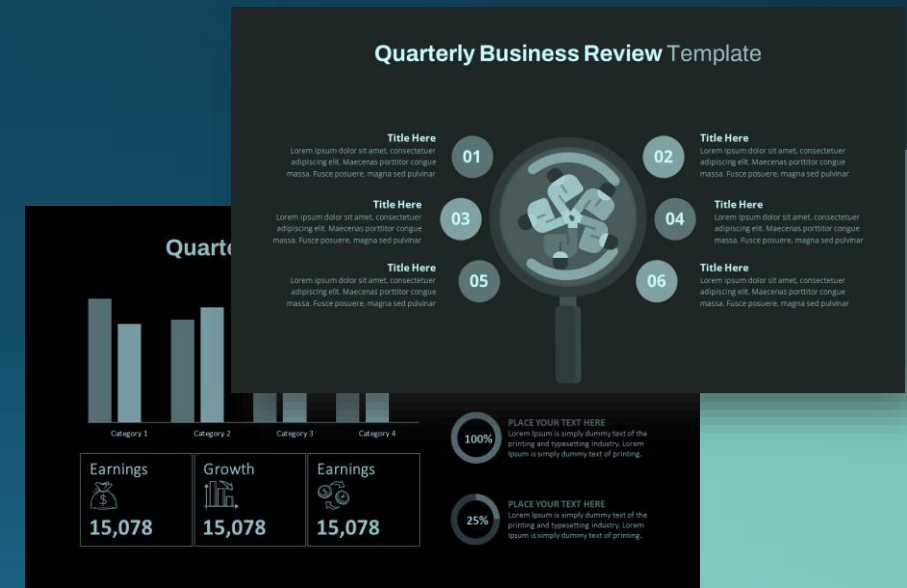


## What We Did:

We designed and implemented a **Quarterly Business Review (QBR)** process to address the recurring tension between agility, governance and compliance.

The goal was simple:

- ✓ Align delivery with strategic and regulatory priorities
- ✓ Create a space for informed, cross-functional decision-making
- ✓ Surface and address risks early—before they impact delivery
- ✓ Make governance and compliance part of the flow, not an afterthought





# WHAT IS A QBR?



A QBR is a quarterly checkpoint that aligns strategy, delivery, and compliance across teams



01

## Performance Review

Brief overview of the objectives.  
Dive into a review of the previous quarter's performance: key metrics, achieved goals, OKRs, etc  
Analysis of what went well and what didn't

02

## Challenges, Risks & Insights Discussion

Teams highlight any significant challenges, emerging risks, or unexpected issues encountered  
Stakeholders can ask questions and offer initial perspectives.

03

## Future Planning & Strategic Alignment

Upcoming quarter's objectives, initiatives, and strategic priorities  
Outline proposed plans, discuss resource allocation needs, and ensure

04

## Decision-Making & Action Item Assignment

Key decisions being made regarding priorities, resource adjustments, or strategic shifts  
Specific initiatives and action items are assigned to individuals or teams with clear deadlines



QBR  
memo



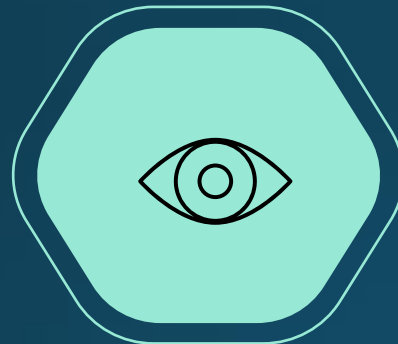
Quarterly  
cadence

# QBR SIGNIFICANT RESULTS



## ALIGNMENT ACROSS COUNTRIES

QBRs were established by **geography** clusters and strategic units (business, technology, risk, compliance), creating systematic spaces for discussing **priorities**, obstacles, and progress more effectively.



## SHARED PORTFOLIO VISIBILITY

Each QBR provided a **comprehensive view** of progress, helping identify critical dependencies and **align** on realistic timelines.



## IMPROVED BACKLOG QUALITY

Teams began building joint backlogs (tech and business) **based on real impact** and feasibility, reducing waste from misaligned initiatives.



## VALUE-BASED PRIORITIZATION

Quarterly governance enabled strategic decisions on which initiatives to **accelerate, pause, or redesign**, using **shared criteria**.



## REDUCED CROSS-AREA FRICTION

QBR sessions strengthened **collaboration and shared accountability**, reducing siloed thinking and promoting a common portfolio mindset.

# QBR SIGNIFICANT RESULTS



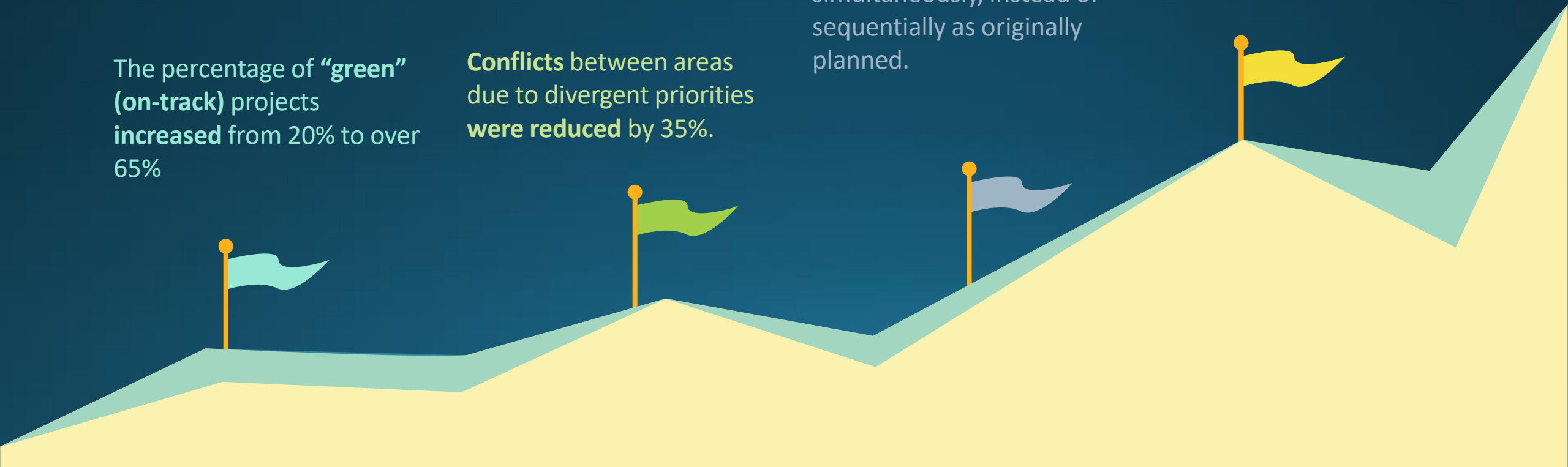
## Impact After One Year:

The percentage of “**green**” (on-track) projects **increased** from 20% to over 65%

**Conflicts** between areas due to divergent priorities **were reduced** by 35%.

Three regional digital products were launched simultaneously, instead of sequentially as originally planned.

Regulators from four countries highlighted **improvements in traceability** and **proactive compliance**



# START SMALL, SCALE SMART

1

SELECT 1-2 DOMAINS OR PROGRAMS

2

FOCUS ON ALIGNMENT, NOT REPORTING

3

INVOLVE COMPLIANCE EARLY

4

KEEP IT LIGHTWEIGHT & REGULAR

5

MAKE DECISIONS TREACEABLE

DO YOU HAVE ANY  
**QUESTIONS?**

A large, thin white arc that curves from the left side of the slide towards the right, positioned above the "THANK YOU!" text.

**THANK YOU!**

**Anamelia Morales**

Transformation Leader at NTT Data

[www.linkedin.com/in/anameliamorales](https://www.linkedin.com/in/anameliamorales)

[anameliamorales@gmail.com](mailto:anameliamorales@gmail.com)

[amoralch@emeal.nttdata.com](mailto:amoralch@emeal.nttdata.com)

A thin white arc that curves from the bottom left towards the bottom right, positioned below the contact information.