



SECTOR Banking

PERIOD since 2018

LOCATION Vienna, Austria

COMPANY

Erste Bank Desterreich

WEBSEITE

[www.sparkasse.at/erstebank-en](http://www.sparkasse.at/erstebank-en)

BASELINE SITUATION

Erste Bank Desterreich's "Learning & Development" department is responsible for the company's internal CPD program. A team which started off with two members developed a webinar concept for approximately 500 leaders and created the webinar in the company's in-house video studio. It was a huge success, so plans were made to offer suitable webinars to all employees. As a result, the task's complexity increased, and it became difficult for the part-time team members to manage. Additionally, they hoped to be able to quickly integrate new team members, such as interns, into the workflows.

SOLUTION

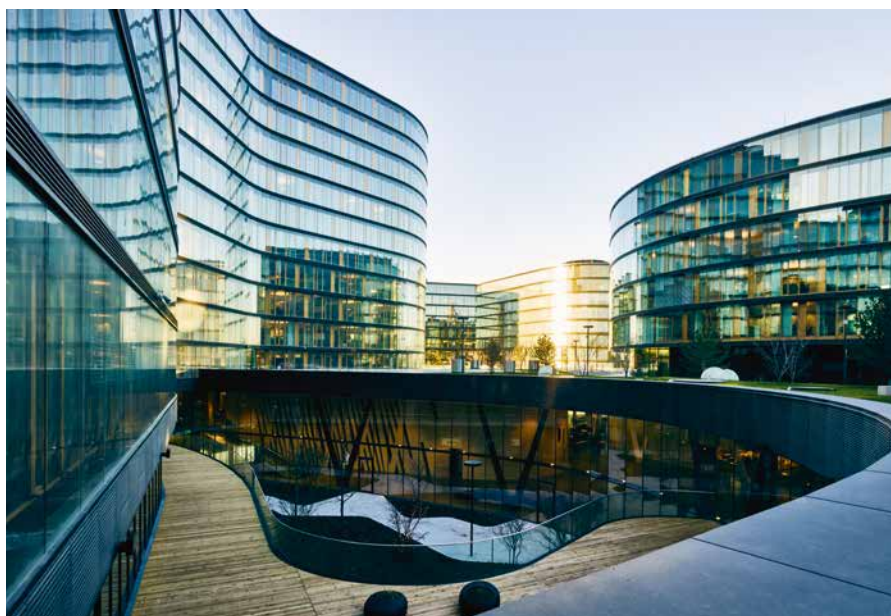
The team experimented with a Kanban board to help them efficiently manage the projects. All steps, from the idea through to the final webinar, were analyzed and visualized by the entire team. Today, these steps are transparently illustrated and contain all the information necessary for the independent organization of a webinar.

RESULT

The Kanban board made routine workflows very straightforward, thus providing space for new ideas. Members of the organization provide enthusiastic feedback on the webinar, and they continually put forward ideas for new topics. Working with the Kanban board took pressure off the employees, as now everyone knows exactly what they have to do and when. The webinar team makes its ways of working visible to all colleagues and, as a result, has become a disseminator for agile ways of working within Erste Bank Desterreich.

## Erste Bank Desterreich: Professional webinars thanks to agile organization

Nowadays, with the appropriate tools, anyone can stream a webinar from their living room onto the Internet. Erste Bank has higher standards, though: they aim to provide webinars of the highest quality, both in terms of content and technology, for their employees' internal continuous professional development (CPD). This is unproblematic for the webinar team, seeing as it works according to agile principles.



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In 2019, Erste Bank Desterreich celebrated its 200<sup>th</sup> anniversary—it is one of the oldest banks in Austria, yet also one of the most modern. For several years now, Erste Bank has adopted ways of working that are somewhat uncharacteristic for such a traditional company. For example, the "George Labs" used agile ways of development and created an online banking platform which set new standards within the Austrian banking industry. The "Erste Campus" in Vienna, which was completed in 2015, provides a coworking space with modern interior design for approximately 5,000 employees, and the „Financial

Life Park" (FLiP) targets young clients outside of traditional bank branches by providing an environment for children and adolescents to learn about money management in a modern way. Furthermore, the FLiP Lab enables young entrepreneurs to develop their business models. The current advertising slogan #believeinyourself is therefore consistent with these developments and is equally applicable to employees, who can choose from a wide range of internal CPD offers. These offers include regular webinars that are produced in a professional video studio located onsite at Erste Campus.

The “Learning & Development” department, led by David Gezzele, is responsible for these webinars, which are created by Andrea Schmidt and her team. The webinars are produced professionally, quickly, and always deal with topical issues—this is possible, amongst other things, thanks to the fact the team organizes its workflows with a Kanban board and has thus become more efficient.

### WEBINAR, TAKE ONE: HIGH QUALITY MEANS HIGH COMPLEXITY

“Our aim was to provide an easily accessible offer—initially for approximately 500 leaders—which could be effortlessly incorporated into everyday working life,” says Andrea Schmidt. “We wanted the users to receive hands-on input which they could immediately implement, try out, and develop further.” Webinars are the ideal tool to meet these demands, but David Gezzele and Andrea Schmidt wanted to avoid the typical PowerPoint wastelands, and speakers who have no way of knowing whether anybody is listening. “As we already have a professional in-house studio, I’m not going to sit and start speaking in front of my laptop camera,” says David Gezzele, putting it in a nutshell. The product’s high standard of quality guaranteed that the webinars were well-received, even despite a technical glitch during the pilot webinar. However, the pilot event also brought home how complex the preparation, implementation, and follow-up activities really were.

1. Technology-related complexity: it makes a great deal of difference whether the webinar, transmitted via a popular tool, is recorded on a standalone laptop, or in combination

with professional video-studio technology.

2. Content-related complexity: not all speakers are comfortable talking to an audience they cannot see. In order to achieve the desired quality, facilitated webinars proved more efficient, more interesting for the audience, and more agreeable for the speakers. Furthermore, most trainers are used to workshops spanning an entire day and have to summarize their content for a one-hour webinar. This requires test sessions and close cooperation in the run-up to the webinar.

3. Organization-related complexity: the studio and technology need to be booked in advance; the trainers need to be selected, briefed, and supported. Next, invitations need to be sent out; afterwards, the recording needs to be made available, feedback gathered, and e-mails containing additional information sent out.

### WEBINAR, TAKE TWO: SUCCESS LEADS TO EVEN MORE COMPLEXITY

As the main person—and, in the beginning, the only (part-time) employee—responsible for the webinars, Andrea Schmidt initially had to find solutions to all of these issues by herself. She did so successfully: the executives were enthusiastic and wanted more. “So, we expanded the offer, and that went well for a while,” says Andrea Schmidt. “Soon, there was a desire for another webinar format for the large target group of employees, as well as for webinars in English.” This was when things started to become really complex: more webinars in shorter intervals,

numerous workflow items that had to be managed simultaneously, more trainers, different target groups—but limited time resources. Although Henriette Sagmeister, another part-time employee, had joined Andrea Schmidt by this point, it also meant that information was now “stored” in different brains, which didn’t make it easier either. “Our meetings became longer and longer—when we were planning five or six webinars at the same time, it always took a long time to find out where we were at with each webinar,” says Andrea Schmidt, summarizing the problem. A key moment, to her, was onboarding interns who provided organizational support to the two-women team, but only stayed for a few months and had to learn the ropes quickly. This was when she realized the risk: “What happens if I should be absent? I knew that I was a bottleneck, but it proved difficult to find out which tasks it made sense for me to hand over,” she says.

At the same time, the entire “Learning & Development” department was experimenting with Personal Kanban boards. “We were euphoric at the beginning, but we didn’t think it through properly,” Andrea Schmidt admits. “Three weeks into the experiment, it annoyed us because it was another tool that needed maintenance, in addition to our Excel sheets.” They did feel, however, that a similar principle could be helpful for organizing the webinars. Verena Heissenberger, Erste Bank’s agile coach, provided help by pointing out the values and principles that are at the heart of their visualization. Finally, Andrea Schmidt was convinced that a board could be advantageous for organizing the webinar workflows—but only if the entire team agreed.

## WEBINAR, TAKE THREE: HOW TO INSPIRE THE TEAM

The next step was a joint development process that the team invested a lot of time in. Initially, they did have concerns that a board might lead to over-administration, but a simple question enabled everyone to see the benefit: “why should we work with a Kanban board? What do we want to achieve?” The team had three goals:

- Efficient management of ongoing projects that left enough time and energy for the development of the formats.
- Transparent and clear organization of the information that had previously only been in their brains.
- Structured and swift onboarding of new team members that enabled them to work independently more quickly.

This clear “why” was followed by a deadline by which the team wanted to present their board to the entire department. “We deliberately removed ourselves from day-to-day business in order to analyze every step from the idea to the finalized webinar, and find out which deliveries are needed at which point in time. This cannot be achieved in a two-hour session,” Andrea Schmidt explains. By means of this visualization it became clear how many details the organizational process encompassed. Finally, everyone understood why they sometimes felt like they were “drinking from the fire hose”: the more tasks there are that need completing, the more difficult it is to stay on top of things if there is nothing tangible to keep you going. These days, a webinar’s stages from preparation to follow-up are represented by color-coded cards on the board and accompanied by all the information needed to complete them. The board and its content were

developed with every iteration: for example, over the course of the team’s work with the board, they realized that their definitions of the steps were too detailed. At the beginning, this had been important for them in order to understand the process and distribute responsibilities. For their daily implementation, though, the team removed some of these steps from the visualization.

everyone—experienced employees as well as interns—and taking their views and wishes seriously. Behavioral patterns had made this difficult at the beginning, Andrea Schmidt admits, but if there is a common goal, every opinion counts. After all, the product “webinar” is also directed at all Erste Bank employees, she says. At the end of the workshops, intern Hannah Königsmayr provided the following summary: “it was really fun, because I got the impression that my opinion was accepted and discussed in a serious manner.” Hannah’s contribution was especially valuable: bringing in the perspective of someone new, she could make them see what she needed in order to quickly find her bearings and be able to work autonomously. This resulted in a form of documentation which has been tested and improved with all other interns who have since been part of the team.

## WEBINAR, TAKE FOUR: EVERYDAY WORK RUNS SMOOTHLY

Today, the Kanban board is the webinar team’s key working tool. It did not—as they had initially feared—result in over-administration, but brought transparency and structure. Due to the team members’ different working hours in the office, they only have one standup meeting at the board per week. For this reason, it is a longer meeting, usually taking one and a half hours. The team first discusses all tasks on the board and then works on individual tasks together.

Even if it is a small team, coordination efforts have been substantially reduced in this manner. What had formerly needed to be discussed in many e-mails and enquiries due to different working hours, can now be worked on in a focused manner and is swiftly implemented. There is a clear

They achieved the feat of having all team members agree with the result by involving





rule: those who assume a task commit to delivering a result. The tasks are continuously prioritized—and the order of implementation is dependent upon urgency and the team’s workload. Only once the most important tasks have been completed, do they tackle the next tasks.

Besides the visible result of the board and the documentation for rapid integration into the workflows, the team has grown together and its members enjoy what they do. Working with the board took the pressure off everyone: they all know that the webinars will also run smoothly should a team member be absent. There have been improvements for individual team members, too. Andrea Schmidt admits that this change taught her to complete one task instead of starting three.

## WEBINAR, TAKE FIVE: FOCUS CREATES ROOM FOR DEVELOPMENT

Illustrating the default webinar organization brought so much efficiency to the team’s work that room was created for new developments—as had been the goal. The board’s final card for every webinar cycle (one iteration) is labelled “review”. Soon after the live event, the team meets to talk about things that went well and things that did not, as well as to discuss what it can do better next time. They ask for feedback in a structured manner after every webinar, which often contains small, particularly valuable hints. For example: one colleague asked for reading recommendations after the webinar—these recommendations have been an integral feature in the follow-up e-mail ever since. Another idea led to the teaser videos: prior to the webinar, the speaker is asked four specific questions concerning its content—this enables the colleagues to decide

whether the topics are relevant to them and whether they want to take part in the webinar.

However, they have also found another way to gather ideas: the webinar team’s board is placed in the “Learning & Development” department’s hallway and is visible and accessible to all colleagues. Over the course of the entire year, suggestions can be added to the backlog, e.g., on new webinar topics or trainers who could provide interesting input. Twice a year, the webinar team examines all of the ideas and uses them to draw up their new program.

The entire pool of trainers is now made up of this collective knowledge and reflects the current hot topics. Yet the webinar team is not only the recipient of ideas—thanks to the freely accessible board, it also disseminates the idea of agile ways of working in the organization. Everyone who is interested can participate in a standup

meeting. As a result, teams from the “Learning & Development” department as well as from other departments have developed their own boards.

## IT IS A WRAP: A SMALL TEAM CREATES VALUE FOR HUNDREDS OF COLLEAGUES

Less stress for everyone involved, and high-quality output: this is the clear effect of the team’s agile webinar organization. David Gezzele confirms this: “I see fewer stressed employees, workflows that are professional by default, fantastic new ideas, and greater ease. For me, it is not about being able to implement a larger number of webinars, but about the fact that motivated and content employees perform well—this is reflected in the organization’s feedback.” The webinars are an important addition to Erste Bank Desterreich’s seminar offers, enabling them to reach a wide target group. This considerably reduces per-capita costs. Since the very beginning, the branches’ executives have been particularly keen on the webinars: they can include a one-hour training in their everyday

working lives without having to factor in long journeys to a training location and back. They often report that the content creates hands-on added value, the webinars are fun, and they enable them to regularly receive relevant input on leadership. 97 percent of the participants attend the webinars until the end. The organization even wants to go a step further: various departments have already enquired about using the webinar concept as well. The team’s success and the many new ideas led to the recruitment of two further team members. It is important to Andrea Schmidt and David Gezzele to add new knowledge and skills to the team—e.g., on the topic of “future competencies”, which are needed to strengthen Austria’s position as a location for digitalization. The documentation and the board are invaluable to the new colleagues.



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“” **Allowing each team member to voice their perspective is the key to success. When you are used to a very structured setting, this can be a challenge. If you succeed, it strengthens motivation and commitment, thus creating the conditions for top performance.**

**Andrea Schmidt** | Learning & Development – Erste Bank Oesterreich