

CASE STUDY | SAATVA

From Stalled Momentum to Structured Transformation: Agile Leadership & Portfolio Design at Saatva

Saatva had the appetite for transformation but lacked the structure to make it move. In 6 months, Agile Velocity launched the Agile Leadership Team, built Scrum Master and Product Owner capability, and designed a portfolio structure to give leadership control over what enters the system.

6 Months

Engagement Duration

1 ALT

Launched

2 Roles

Upskilled

4 Recs

Key Recommendations

THE LANDSCAPE

The Situation

Saatva had the appetite for transformation. What they didn't have was the structure to make it move. The Agile Leadership Team was formed but lost momentum. Product Managers were stretched across too many competing priorities. And unplanned work kept derailing the initiatives that actually mattered.

The organization wasn't resistant to change, it was overwhelmed by it. Before any transformation could take hold, leadership needed to get clear on what to prioritize, how to protect capacity, and what "done" actually looked like.

THE REAL BLOCKERS

- 1 ALT progress had begun to stall, constrained by limited bandwidth and asynchronous ways of working, the leadership team was unable to operate at the pace required for the transformation.
- 2 High interest, low commitment. People wanted to be part of the change. Their calendars made it impossible.
- 3 Product Managers were overloaded, managing WIP, backfilling open roles, and sharing team members across initiatives simultaneously.
- 4 Unplanned high-priority requests kept landing. Every reactive pivot cost the organization forward momentum.

THE TRANSFORMATION

The Approach

Agile Velocity was engaged to assist with the transformation, working closely with the Agile Leadership Team and surrounding leaders. The focus was to support the transformation and establish the clarity, capability, and operating structure needed to make the transformation self-sustaining.

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| 1 Assessment & Diagnostics
Conducted structured interviews across the organization and delivered a full assessment report, pinpointing where to focus the transformation first, so energy wasn't wasted in the wrong places. | 2 ALT Formation & Activation
Facilitated the launch of the Agile Leadership Team: defined their compelling purpose, built their transformation backlog, and established a roadmap with clear ownership. |
| 3 Leadership Skill Development
Delivered targeted Scrum Master and Product Owner training alongside 1:1 coaching, building the people-level capability that makes team-level agility possible. | 4 Portfolio Structure Design
Facilitated design sessions to establish portfolio agility practices, giving leadership the visibility and prioritization mechanism needed to control what enters the system. |

THE CULTURE SHIFT

Sustaining the Transformation

The engagement identified four high-impact opportunities for Saatva to sustain and accelerate the transformation.

1. **Portfolio Team for Prioritization** — Use the portfolio structure to make deliberate choices about what gets resourced and when. Stop letting urgency set the agenda.
2. **Dedicated ALT Time** — Protect time in the leadership calendar specifically for transformation backlog work. Without it, the roadmap stays a document, not a commitment.
3. **WIP Reduction for Product Managers** — Actively reduce the number of initiatives Product Managers are accountable for at any one time. Overload produces mediocre outcomes across the board.
4. **Team-Level Coaching** — Install coaches to work directly with delivery teams on rollover work, retrospective effectiveness, and continuous improvement habits.

PATH TO AGILITY®

Transformation Progress

1 Align	2 Learn	3 Predict	4 Accelerate	5 Adapt
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Saatva is in the **Align** stage, having established leadership alignment through the ALT, defined their transformation purpose, and built the portfolio structure needed to prioritize effectively. With assessment insights and a clear roadmap in place, they are positioned to move into the Learn stage.

OUTCOMES ACHIEVED

The Results

- ✓ Organizational assessment completed — with a prioritized, actionable set of recommendations
- ✓ Agile Leadership Team launched with a defined purpose, transformation backlog, and roadmap
- ✓ Scrum Master and Product Owner capability built through structured training and 1:1 coaching
- ✓ Portfolio structure designed to enable leadership-level prioritization and WIP control
- ✓ ALT vision statement and targeted business outcomes defined and agreed
- ✓ Foundation for sustainable, internally-led transformation established

"The work wasn't about introducing Agile. It was about giving leadership the clarity and structure to lead a transformation — not just talk about one."

Ready to Write Your Own Success Story?

Every transformation starts with a conversation.

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