

The Agile Mindset:

Applying Agile in Non-Technical Areas of an Organization

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Agenda

- Introductions
- The Client
- 5 Strategic Goals
- 2 Case Studies
 - Promotional Campaigns Lab
 - Agile Center of Excellence
- Summary
- Q & A
- Resources

Bios

- Tiffany
 - Program Manager
 - Worked as
 - Business Analyst
 - Agile coach
 - Project Manager
 - Iteration Manager
 - Scrum Master



Bios

- Manu
 - Account Manager
 - Worked as
 - Tester
 - Business Analyst
 - Agile coach
 - Project Manager
 - Iteration Manager
 - Scrum Master



*Here is Edward Bear, coming downstairs now, bump, bump, bump, bump, on the back of his head behind Christopher Robin. It is, as far as he knows, the only way of coming downstairs, but sometimes he feels that **there really is a better way**, if only he could stop bumping for a moment and think of it.*

-A. A. Milne, *Winnie-the-Pooh*. London: Puffin Books, 1926



The Client

- Major credit card company and financial institution
- 1,500 employees local; 31,800 national (2006)
- \$18.97bil annual revenue (2008)

5 Strategic Goals

- Deliver Solutions Faster
 - Achieve reductions in Time to Market (TTM) (e.g. 25% reduction in TTM for all Units. 50% reduction for Credit Card operation)
 - Achieve reduction in project portfolio size and average project size
- Leverage Leading Methodologies and Solutions
 - Achieve Delivery Methodology compliance targets
 - Roll out adoption of Agile Methods
- Introduce Technology Solutions that Deliver Business Value
 - Achieve value greater than 2X budget

5 Strategic Goals

- Manage Risks and Controls Effectively
 - All new systems have to achieve compliance with changing regulations
- Lead a Talented and Motivated Workforce
 - Reduce employee turn over
 - Increase employee satisfaction ratings

The Challenge

- Non IT Organizations do not “develop” software
- Most Agile literature is geared towards development teams
 - Engineering practices have tools to support them
- How does an organization get started?
- What has to change in the organization?

First Steps

- Select internal coach candidates
- Identify pilot teams
- Introduce the principles
 - Tied to specific practices
- Lay out the pace of change

Case Study 1 – Promotional Campaigns Lab

- A department of 100
 - Short-term Marketing Campaigns
 - Call Center Staff
- 2 newly certified Scrum Masters
- Teams aligned by Functional Manager
- Marketing Campaigns went from concept to product to call center in 7+ months

Case Study 2 – Agile Center of Excellence

- Define a CoE to support rollout of Agile
- Build an ecosystem for teams to draw on
- Develop several tracks
 - Standardize process
 - Audit Programs
 - Employee Career Paths

Promotional Campaigns Lab: *Deliver Solutions Faster*

- Reduced TTM to improve competitive advantage
 - Reduce 7+ months from concept to market release



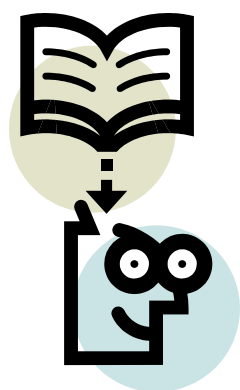
Promotional Campaigns Lab: *Deliver Solutions Faster*

Concept to Product

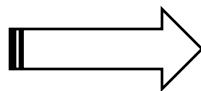
- Engaged customer for Prioritization
- Very small iterations
- User Stories with clear Acceptance Criteria

Product to Call Center

- Team Stand-ups
- Iterating through training material
- Feedback early and often



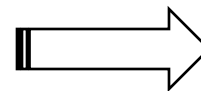
6 months



3 months



4 weeks

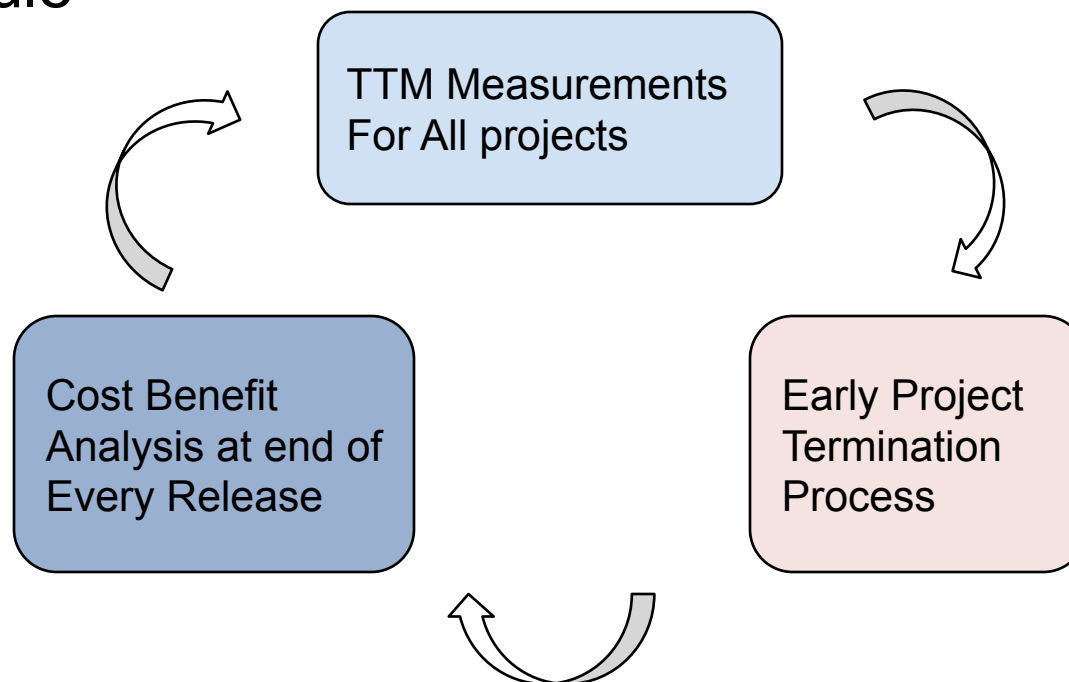


10 days



Agile Center of Excellence: *Deliver Solutions Faster*

- Time to Market measurements instituted
- Each team had to adopt an iterative development schedule



Promotional Campaigns Lab: *Leverage Leading Methodologies and Solutions*

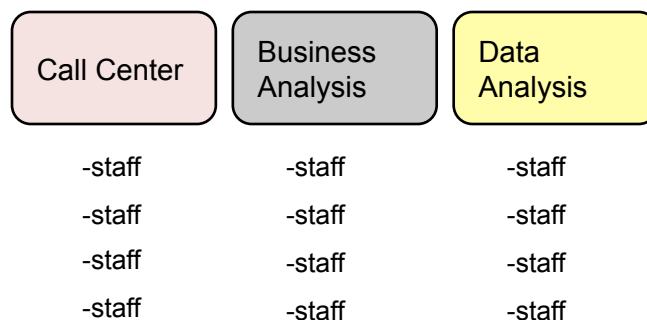
- 2 Certified Scrum masters who needed to “do” Agile
- Documentation became consumables not deliverables
- *“Doing the right thing” mentality gave good soil for Agile to take root*

Agile Center of Excellence: *Leverage Leading Methodologies and Solutions*

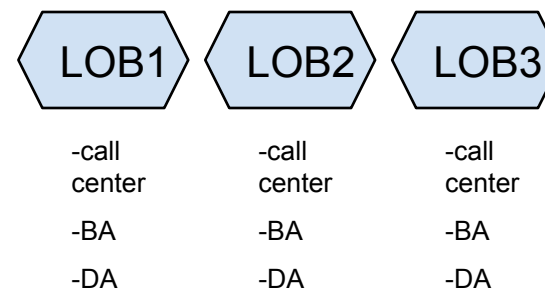
- Existing methodologies did not meet the needs of teams
- Agile track introduced for project delivery
- Specific practices introduced –
 - Customers – Prioritization and Showcases
 - User Stories – Acceptance Criteria
 - Iterations
 - Daily Standups
 - Retrospectives
 - Estimation
- Rewards and penalties were articulated

Promotional Campaigns Lab: *Introduce Technology Solutions that Deliver Business Value*

- Re-align departments from functional managers to LOB
- Within iterations, customer and coach prioritized the backlog each iteration
- Iterative “showcase” to the customer of both product and training material



OLD STRUCTURE



NEW STRUCTURE

Agile Center of Excellence: *Introduce Technology Solutions that Deliver Business Value*

- Projects went to production sooner
 - ROI could be calculated by Release
- Business value delivered became important and measurable
- Project execution could be mapped to strategic goals
- Acceptance criteria accurately defined “done”

Promotional Campaigns Lab: *Manage Risks and Controls Effectively*

- Prioritization and Transparency
- Clear acceptance tests written/reviewed by customer
- Iterative, early feedback
- Clean audit trails in backlog of changes

Agile Center of Excellence: *Manage Risks and Controls Effectively*

- Agile teams were able to incorporate changes in requirements
- The definition of customer incorporated all the stakeholders
 - teams were able to meet requirements of all groups
- Showcases and retrospectives allowed the teams to course correct
- Internal certification for standardization

Promotional Campaigns Lab: *Lead a Talented and Motivated Workforce*

- Improved communication/visibility into goals felt empowering
- New Career path
 - Into LOB, became SMEs
- Retrospectives allowed them to voice their opinions

Agile Center of Excellence: ***Lead a Talented and Motivated Workforce***

- Employees became engaged when they could see value delivered
- Estimation empowered implementers
- New career path
 - Agile coaches, Apprentice coaches and master coaches

How did we leave them?

- Agile delivery track for all projects
 - Team “ownership” through customization
- Customer and team collaboration became valued
 - Customer satisfaction became important
- Center of Excellence community
 - New career path
- Repeatable certification process
- Transparency across all projects
 - Periodic pulse-check mechanisms used

Pulse-check Mechanisms Used

- The Agile delivery Track with detailed process steps for all roles on a team
- Agile Readiness Assessment for teams, projects, managers, executives
- IT Risk Office Audit Program
- Agile Coach Certification Guidelines - the path from Apprentice to Master Coach

Status Report

Project Report: WS++ as at end of Iteration 1 (30 Oct to 3 Nov 06)

Business Sponsor: Kevin / Paul IT Sponsor: Jora Gill Project Management: Sue / Michael

Project Health [GREEN]

Project Summary	Baseline	Actual to Date	Projected
Scope (story points)	120.5	0	120.5
Schedule (elapsed days)	87	5	87

Achievements & Progress

- WS+ delivered as planned on 3 Nov 2006
- Review of scope
 - Lead to focus on Charts and Composite.
 - Investigation on Office Integration 16 bit concluded that not matching business needs. Agreement reached by business to drop from project scope.
 - Composite to be delivered using .Net Solution instead of building on existing WS.
- Iteration 2 story development currently in progress. 4 stories planned in total of 11.5 points
- Process and Governance bedded down and rolled out.
- Baseline list of stories defined and estimated. Staff leave and holidays accounted for.
 - 2 Mar 07 (Development Complete)
 - 23 Mar 07 (Testing Complete)

Decision Required

- Inception Report sign off
- Agree communication to the Steering Committee
- Discuss and agree on scope review findings

Next Steps

- Planning for Iteration 3 – 4 scheduled for Wed 8 Nov 06
- Baseline and milestones for project for Wed 8 Nov 06
- Completion of Testing Strategy definition scheduled for Fri 10 Nov 06

Key Issues and Risks

See Inception Report for risk and issues

Project Dependencies

Alpha

- On tracked as planned. First drop completed and will be issued when commercial are finalised.
- Willis is the point of contact and will be relaying technical questions to Michael Lee and Bill Stock.
- Weekly status meeting have commenced.

Hermes

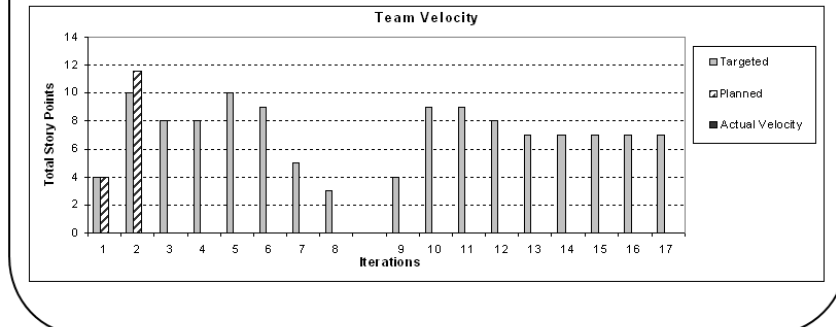
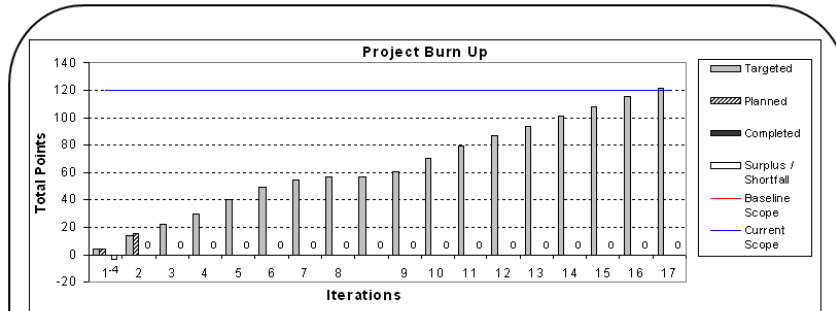
- Full cut Hermes feed and deltas planned for 30 Nov 06
- Andrew is the point of contact and will be relaying concerns to Michael Lee and Bill Stock.

Velocity (Story Points) [RED]

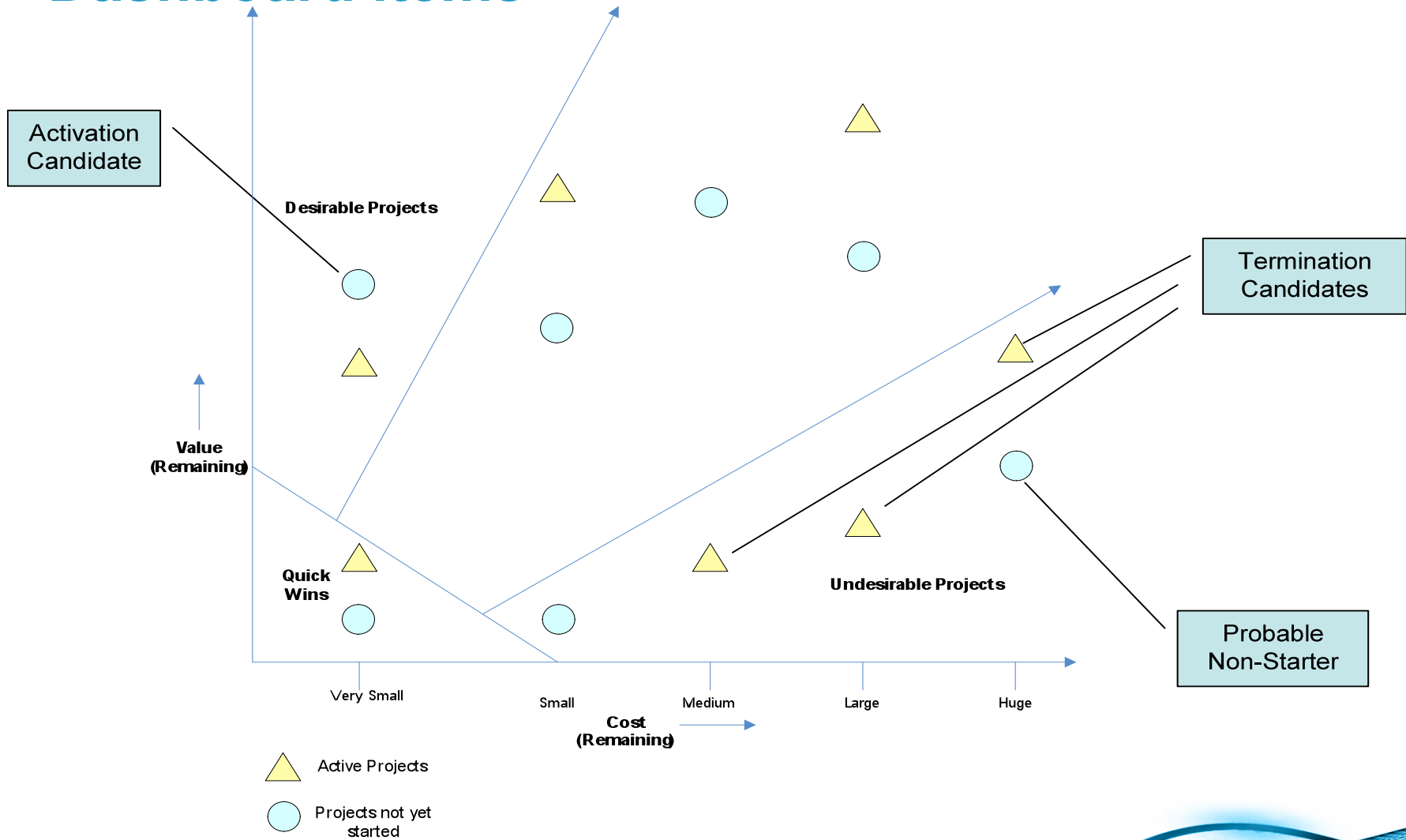
Iteration 1 Summary	Planned (100%)	Actual	Variance	Health
Velocity (Story Points)	4	0	-4	RED
Dev / FTE Days (5 FTEs)	19	13	-6	RED
No. of Stories Prepared	4	4	0	GREEN

Key Messages

- Martin and Stacey were required for WS+ bug fixes and were unable to complete planned composite and WS enhancement stories.
- Office Integration stories were stopped due to discovery mentioned above.
- Scatter chart story was started but not completed but will be completed in Iteration 2.
- Development input required to support baseline definition and estimation.
- Iteration 2 stories have been elaborated with agreed level of detail based on lesson learnt from Iteration 1.



Dashboard items



Remaining Challenges

- Not everyone is a believer
- Not every project will be agile
- Agile teams highlighted inefficiencies in groups
 - Inefficiencies had to be tackled in:
 - Database
 - Data Warehouse
 - Infrastructure
- Adjusting employee review and compensation cycles
- These things take time!

Questions??

Internally we call this

Organizational Transformation

If you would like more information

Contact us –

Tiffany – Tiffany@thoughtworks.com

Manu – Mtandon@thoughtworks.com

Resources

- The Agile Manifesto – www.agilemanifesto.org
- The Agile Alliance – www.agilealliance.org
- SCRUM – www.controlchaos.com
- Agile Software Development with SCRUM; Ken Schwaber, Mike Beedle
- User Stories Applied: For Agile Software Development; Mike Cohn
- Teamwork Is an Individual Skill: Getting Your Work Done When Sharing Responsibility; Christopher M. Avery, Meri Aaron Walker, Erin O'Toole