Stop Starting and Start Finishing!
How to Link Agile and Lean Methods across Business and IT to Quickly Deliver Technical Solutions that Achieved the Highest Business Value

NCCI 2014

Presenters: Jeanne Marie Isola, Maureen Noonan, Alin Hunter, Gwen Trentham
Workshop Agenda

I. Introductions/Overview 3:15 – 3:20

II. Lean/Agile Basics 3:20 – 3:40

III. Dot Exercise 3:40 – 4:15

IV. Finance Program Case Study 4:15 – 4:40

V. Wrap Up 4:40 – 4:45
Overview of Workshop

- Review basics principles and concepts of value of adopting a Lean/Agile approach
- “Dot Exercise” – illustrating value of reducing Work in Process
- Go over experience of Financial Management and UWIT Finance Program in scaling Lean/Agile across multiple teams
Lean/Agile Basics and Essentials
Goal and Benefit of **Agility**

**Highest Business Value**

**In a Shorter Amount of Time**

**Predictably**
WASTE and the DELAY OF VALUE

Usage of Features and Functions in Typical System

Source: Standish Group Study of 2000 projects at 1000 companies
Lean-Agile helps eliminate or minimize Risks!

- building more than needed
- building lower priority items
- building right thing wrong
- poor quality software architecture
- having the wrong resources
- discovering functional needs late
Agility focuses on value

Lean principles and Agile practices focused on producing Business value

Agility is about Business Value Increments, not development cycles
Business Value

The single focus for Priority
Progress Work management

Business Value

Business

Team technical

MAKE

Management

FLOW
AGILE provides framework and practices for producing increments of functionality.

LEAN provides principles and practices which enable defining and prioritizing increments of highest Business value.
Lean Thinking

Only work on something that has Business value and you know how to achieve it

Only start something you know you can finish (uninterrupted)

Have a quick ‘Discovery’ process to enable the above 2 things
PULL
Focus on speed of Producing Value
Not on utilizing an individual persons capacity
Stop Starting and Start Finishing
### Lean-Agile Software Development

<table>
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<tr>
<th>Key Principles</th>
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<td>Optimize the Whole</td>
<td>Create Knowledge</td>
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<td>Eliminate Waste</td>
<td>Empower People</td>
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<td>Build Quality In</td>
<td>Focus on Flow (of Value)</td>
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<td>Deliver Fast</td>
<td>Continually Improve</td>
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<td>Defer Commitment</td>
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you cannot build the right thing if you have not **discovered** it first!

Things to Discover...

- Business Value (ROI)
- Priority & Sequence
- Business Value increments
- Acceptance / Validation Criteria
- How to build it
- What resources are needed
- How to implement it
Roles, Boundaries, Scale, & Levels
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<th><strong>IT &amp; Business</strong></th>
<th><strong>Team</strong></th>
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<td><strong>Why</strong> is this valuable?</td>
<td><strong>What</strong> is best way to deliver that value?</td>
<td><strong>How</strong> to achieve that value?</td>
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<td>Business capabilities</td>
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<td>Message map</td>
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<td>Budget</td>
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*define* | *design* | *submit to team*
Toolsets

Lean-Agile Framework
- Executive, Business, Management, & Team

Portfolios
- Book of Work
- Rolling Releases
- Levels 1, 2, & 3

Complexity of environments

Scaled Agile Framework
- Business, Management, & Team

Programs
- Program Backlog
- Releases
- Multiple Teams

LA Iterative Framework
- Business & Team Practices

Projects
- Product Backlog
- Iterations
- Whole Team
Lean-Agile Roles

Business

Executive
- Executive Sponsor
- Business Sponsor
- Stakeholders

Management
- Business Product Owner(s)
- Business PM
- Technology Owner
- Technology Delivery Manager
- Application Development Manager

Front Line
- Product Owner (Release)
- Business Subject Matter Expert
- Business Analyst
- Focus Groups
- User Acceptance Testers
- LAPM (Scrum Master)
- Technical Lead
- Developers
- Testers
- Support

Technology

Lean-Agile Roles
Team Agility

Value Delivery Teams (Pods)
• Cross-functional
• Collective ownership
• Self-organization

Consistency
Value focus
Visibility
Terminology and roles
Lean-Agile principles, practices, and metrics
Velocity and Business Value delivery capacity

With multiple teams:
Business value driven -> Incremental
Business Value Realization Trends

- **Ideal / Pareto (80/20)**
- **Minimum Build Out**
- **Typical Waterfall?**
- **Blend**
**Business Value ‘Chunk’**
Set of capabilities / functionality which provides value to the Business (realizable). Capabilities include people, process, and technology.

**Minimal Business Increment (MBI)**
Smallest ‘chunk’ of realizable Business value.
Comprised of Business capabilities.
Business Value Chunk

Minimal Business Increments

Feature / Scenario(s)

User Stories

Right-sized Stories

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<tr>
<td>PAS</td>
<td>Laurie</td>
<td>PAS - Debugging migration to LINUX replacement server</td>
<td>High</td>
<td>High</td>
<td>High</td>
<td>Medium</td>
<td>High</td>
<td>Medium</td>
<td>High</td>
<td>N/A</td>
<td>5.50</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Deliver Value / Highest Priority
Lean/Agile Basics
the Business owns Scope, Value, and Timeline and only the Business can start and stop work!
Cadence

**QUARTERLY**  Business value realization
Release train (which train are you going to catch?)

**ITERATION / ITERATION LENGTH**  Two weeks or less recommended
Consistent regardless of any factors

**DAILY**  Happens every day at the exact same time & location
Synchronization

4 Meetings

Iteration Planning

Daily Stand-up

Retrospective

Demo
• Basic Agile Flow

*Sprint = Iteration
Product Backlog

All the work necessary to achieve the Business value

Prioritized and sequenced based on Business value

Constantly evolving and refined (just in time)
Product Topline/Release Burn-up

Top Line / Release Burn-Up. Updated after each iteration. Depicts the team’s velocity (story points per iteration), and overlays estimated projections and release points (BVI). This chart and the Feature Burn-Up combine to give executive transparency into each program’s status.
Key Artifacts

Product Backlog

Iteration Backlog

Sprint 12 – Agile-V Scorecard and Goals

Mon, Aug 10 – Thu, Aug 20

Sprint Goals
- Continue UI design and implementation of Edit Contracts (Attachments, Tier Details)
- Complete UI design and implementation of the Create Contracts activity selection page (where they choose by upload, from existing, from online)
- Complete Regression (up to Sprint 11)
- Fix bug when deleting entity data to catalog
- Complete stories from Sprint 11
Questions?
Dot Exercise
Stop Starting and Start Finishing!
UW-IT Finance Program Case Study

Scaling Agile and Lean methods across business and IT to quickly deliver technical solutions that achieved the highest business value
<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Leadership Strength</th>
<th>Strength Domain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jeanne Marie Isola</td>
<td>Director</td>
<td>Sponsor, Driver, Visionary</td>
<td>Strategic Thinking</td>
</tr>
<tr>
<td></td>
<td>Finance Program</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>UW-IT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alan Chedalawada</td>
<td>President</td>
<td>Trainer, Sensei</td>
<td>Influencing</td>
</tr>
<tr>
<td></td>
<td>Net Objectives</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gwen Trentham</td>
<td>Project Manager</td>
<td>Subject Matter Expert, Coach</td>
<td>Executing</td>
</tr>
<tr>
<td></td>
<td>Finance Program</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>UW-IT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maureen Noonan</td>
<td>Org Dev Specialist</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Organizational Development</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>UW-IT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alin Hunter</td>
<td>Technology Manager</td>
<td>Governance, Coach</td>
<td>Relationship-Building</td>
</tr>
<tr>
<td></td>
<td>HR/P Modernization Project</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
University Organization Chart
(Approved by the President by authority of the Board of Regents Governance, Standing Orders, Chapter 1)

This chart reflects the reporting relationships within the University of Washington. Select any box on this chart to link to more detailed information in APS 1.2, University Wide Leadership List.
<table>
<thead>
<tr>
<th>Business</th>
<th>IT &amp; Business</th>
<th>Team</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Why</strong> is this valuable?</td>
<td><strong>What</strong> is best way to deliver that value?</td>
<td><strong>How</strong> to achieve that value?</td>
</tr>
<tr>
<td>Goals</td>
<td>Business capabilities</td>
<td>BVIs prioritized by Business Value</td>
</tr>
<tr>
<td>Business Value criteria</td>
<td>Workflows</td>
<td>Prioritized business features</td>
</tr>
<tr>
<td>Success metrics</td>
<td>Process models / maps</td>
<td>Scenarios / Personas</td>
</tr>
<tr>
<td>Message map</td>
<td>Scenarios</td>
<td>Validation approach &amp; acceptance criteria</td>
</tr>
<tr>
<td>Segments / audience</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Product Vision</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Budget</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**define** | **design** | **submit to team**
Financial Systems Agile/Lean Vision

Scale Agile/Lean across financial systems to maximize on solutions using business-driven value criteria to ensure highest priority work is delivered.
“A Portrait of a Woman in a Pastoral Scene” using an **Waterfall** approach
“A Portrait of a Woman in a Pastoral Scene” using an **Agile** approach
Delivering Value Early and Incrementally

Month 1
Month 2
Month 3
Month 4
Month 5
Month 6

Value
Toolsets

### Lean-Agile Framework
- Executive, Business, Management, & Team

### Scaled Agile Framework
- Business, Management, & Team

### LA Iterative Framework
- Business & Team Practices

#### Portfolios
- Book of Work
- Rolling Releases
- Levels 1, 2, & 3

#### Programs
- Program Backlog
- Releases
- Multiple Teams

#### Projects
- Product Backlog
- Iterations
- Whole Team

Complexity of environments
Team Agility

Value Delivery Teams (Pods)

• Cross-functional
• Collective ownership
• Self-organization

With multiple teams:

Consistency
Value focus
Visibility
Terminology and roles
Lean-Agile principles, practices, and metrics
Velocity and Business Value delivery capacity
Systems/Workteams/PODs

1. My Financial Desktop (MyFD)
2. Faculty Effort Certification System (eFECS)
3. Budget, Finance, Purchasing (mainframe systems)
4. Ariba (procurement)
5. JDEdwards (grants receivables)
Phase I: March – June 2013

Business Value Criteria

Training: Come one, come all
Trained over 60 staff; 36 from business organizations

Deliver Value / Highest Priority
Phase I: March – June 2013

Weighting Business Value Criteria

Prioritizing Work

Deliver Value / Highest Priority
Improving prioritization of work within and across each product stream
# Book of Work: Visibility, Alignment, Transparency, Consistency

Deliver Value / Highest Priority
Value Criteria

Improve capabilities
Mitigate risk
Enhance user experience
Reduce cost
Compliance
<table>
<thead>
<tr>
<th>Business Value Criteria</th>
<th>Description</th>
<th>N/A</th>
<th>Low</th>
<th>Medium</th>
<th>High</th>
<th>Notes/Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compliance</td>
<td>Support regulatory compliance for federal, state, and/or University policy.</td>
<td>No compliance issue</td>
<td>Compliance issue with minimal repercussions</td>
<td>Compliance issue with repercussions</td>
<td>Operationally necessary</td>
<td>Can be &quot;High&quot; only if operationally necessary</td>
</tr>
<tr>
<td>Improve Capabilities</td>
<td>Improve existing capabilities, add new capabilities, increase capacity, performance, and abilities. Manage resources to support strategic priorities and grow and steward UW's assets.</td>
<td>Not related to capabilities</td>
<td>Provides low value to campus</td>
<td>Provides high value to campus</td>
<td>On critical path of strategic roadmap</td>
<td>Capabilities can only be &quot;High&quot; if it is a Roadmap Strategic Priority</td>
</tr>
<tr>
<td>Mitigate Risk</td>
<td>Risk in quality, timeliness, inclusiveness. Includes financial, reputational, and operational risk and the availability, security, and sustainability of the systems.</td>
<td>Not related to risk</td>
<td>Provides some mitigation of risk</td>
<td>Provides significant mitigation of risk</td>
<td>Completely removes high risk from the organization</td>
<td>Should be equal to or greater than &quot;Technology Risk&quot;</td>
</tr>
<tr>
<td>Enhance User Experience</td>
<td>Tiers based on how benefits tie to internal and external system users. Provide value to our users by providing value for your money, help solve complex UW wide problems, provide clear, timely, accurate and consistent communications.</td>
<td>No direct benefit to customer</td>
<td>Benefits less than half of the customers</td>
<td>Benefits over half of the customers, but not all</td>
<td>Benefits all customers</td>
<td></td>
</tr>
<tr>
<td>Reduce Cost</td>
<td>Reduce dollars and saving time; Improve operational excellence. Increase efficiency and effectiveness; free up staff to do more important work.</td>
<td>No cost reduction</td>
<td>Potential cost equivalent savings below $100 K</td>
<td>Potential cost equivalent savings of over $100 K</td>
<td>Potential cost equivalent savings of over $500 K</td>
<td></td>
</tr>
</tbody>
</table>
**Formula:**  
Value Metric Score: \( \frac{[\text{Value Score}] + [\text{Urgency Score}] + [\text{Technical Risk Score}]}{\text{Level of Effort Score}} \)

### BUSINESS VALUE FACTORS

<table>
<thead>
<tr>
<th>Factor Label</th>
<th>Business Value Factors</th>
<th>Weights</th>
<th>N/A</th>
<th>High</th>
<th>Medium</th>
<th>Low</th>
</tr>
</thead>
<tbody>
<tr>
<td>BVF1</td>
<td>Compliance</td>
<td>0.3</td>
<td>0</td>
<td>10</td>
<td>5</td>
<td>1</td>
</tr>
<tr>
<td>BVF2</td>
<td>Improve Capabilities</td>
<td>0.3</td>
<td>0</td>
<td>10</td>
<td>5</td>
<td>1</td>
</tr>
<tr>
<td>BVF3</td>
<td>Mitigate Risk</td>
<td>0.2</td>
<td>0</td>
<td>10</td>
<td>5</td>
<td>1</td>
</tr>
<tr>
<td>BVF4</td>
<td>Enhance User Experience</td>
<td>0.1</td>
<td>0</td>
<td>10</td>
<td>5</td>
<td>1</td>
</tr>
<tr>
<td>BVF5</td>
<td>Reduce Cost</td>
<td>0.1</td>
<td>0</td>
<td>10</td>
<td>5</td>
<td>1</td>
</tr>
</tbody>
</table>

### URGENCY FACTORS

<table>
<thead>
<tr>
<th>Urgency / Timeframe</th>
<th>N/A</th>
<th>Low</th>
<th>Medium</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0</td>
<td>1</td>
<td>5</td>
<td>10</td>
</tr>
</tbody>
</table>

### LEVEL OF EFFORT FACTORS

<table>
<thead>
<tr>
<th>Level of Effort</th>
<th>N/A</th>
<th>Xsmall</th>
<th>Small</th>
<th>Medium</th>
<th>Large</th>
<th>Xlarge</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>5</td>
<td>8</td>
</tr>
</tbody>
</table>

### TECHNICAL FACTORS

<table>
<thead>
<tr>
<th>Risk factor not doing it</th>
<th>N/A</th>
<th>Low</th>
<th>Medium</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0</td>
<td>0.1</td>
<td>0.5</td>
<td>1</td>
</tr>
</tbody>
</table>
Chunks of business value

Slices across the system

strategies

Business Value Chunks

MBIs

features (evolutions)

user stories

right-sized stories

tasks

iterate the system

evolve the business

NetObjectives
POD Agile/Lean News

As the Finance Program approaches sprint 6, the teams are starting to achieve our goals of realizing value in collaborating on priorities and focusing on the highest value stories. Additional successes include:

- Finance Program Book of Work representing activity across all services is now available providing a framework for prioritizing work.
- Roles for each POD are being established, enabling us to quickly and effectively make decisions that are business value driven.
- Business partners are participating in the sprint planning process to help ensure teams are focused on the highest value work.
- Work is being planned by two-week sprints, giving visibility to our work and allowing greater collaboration opportunities in both process and workload.
- eFECS and MyFD have been collaborating and found it helpful to be scheduled for sprint planning and scrums at the same time. We are leveraging this synchronized schedule to meet as a combined group when needed.
- Finance Program Managers' Café established - encouraging collaboration.
- The Finance Program Agile/Lean Glossary and Agile/Lean Roles documents provide helpful definitions of our terms.

Dispatches from the Core Team

The Core Team is developing the Book of Work (BoW) as the overall prioritization tool for the Finance Program. Alan Chedalawada, our Net Objectives coach, joined the May Core Team meeting and provided guidance on maximizing value of the BoW. During the June Core Team meeting, we incorporated these suggestions and vastly refined our criteria and weighting. Having a single method that we all use is a significant step forward, allowing us to get a unified view of priorities across all of the PODs. Over time the Book of Work will evolve to reflect changing priorities and objectives.

What’s Next

Sprint 6 Focus
- Gemba Walk on July 10
- Book of Work Updates
  see here for more details

- July 10 Core Team Meeting and Gemba Walk
  We are looking forward to the upcoming Gemba walk with Business Product Owners and Release Product Owners. There is a good deal of energy around this following the success of the recent Gemba walk by the Management Team of Information Management surveying planning boards across UWIT. The July 10 tour will help to show the processes used to prioritize, track, and manage work and will provide in-sight into how work links to the Book of Work.

- July 18 Finance Program All-Hands Meeting
  POD members will partake in a Gemba walk of the boards to see how work is being managed across the program and gain some in-spiration about evolving their own boards.

- July/August Coaching Sessions scheduled with Net Objectives’ Alan Chedalawada
  Each POD will be participating in a half-day coaching session with Alan Chedalawada over the July/August timeframe. Coaching sessions will help teams refine their estimating processes, explore the use of Top Line and Feature Breakdown charts, and assess how well they are minimizing work in process.

Charts & Metrics
Reiko Shigemoto and Gwen Trentham have created a prototype of the Program Backlog spreadsheet which includes those snazzy charts that Alan C. showed us during training. These will be presented to the TDMs soon. This work book will fill in the significant missing piece in our ability to trace the committed sprint work from the PODs all the way up to the Book of Work. This mechanism can be used to ensure lean principles are being followed to limit work in process, respond to discovery and maintain focus on the highest value capabilities.
Survey Outcomes Measuring Value Achieved

- Improving interactions between Business and IT
- Create common language between Business & IT
- Clarifying roles and responsibilities
- Consistent intake and prioritization processes
- Creating a common cadence/sprint cycle
- Increase visibility into cross program
- Focus on Highest Business Value
- Reducing the amount of work in process (WIP)
- Improve visibility into resource allocation
- Improve prioritization across programs
- Improve prioritization within work streams
- Increase transparency across program

Legend:
- Above Average
- Average
- Below
Phase II: July – December 2013
Consistency and Maturity

Sharing common practices
## Identify Consistent Program Roles

<table>
<thead>
<tr>
<th>ROLE</th>
<th>BGT</th>
<th>GABS</th>
<th>FIN / FASTRANS</th>
<th>OASIS</th>
<th>eFECS Effort Report</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Executive Sponsor</strong></td>
<td>Gary Quarfoth</td>
<td>Sue Camber</td>
<td>Ann Anderson</td>
<td>Sue Camber</td>
<td>Sue Camber</td>
</tr>
<tr>
<td><strong>Business Product Owner</strong></td>
<td>Amy Floit</td>
<td>Tami Sadusky</td>
<td>Jeff Follman</td>
<td>Tami Sadusky</td>
<td>Mike Anthony</td>
</tr>
<tr>
<td><strong>Product Owner (Release)</strong></td>
<td>Judy Gustafson</td>
<td>Brian Baldwin</td>
<td>Dave Beaulieu</td>
<td>Erin Fay</td>
<td>Mike Anthony</td>
</tr>
<tr>
<td><strong>Subject Matter Expert</strong></td>
<td>Judy Gustafson</td>
<td>Brian Baldwin</td>
<td>Dan Schaaf / Sarah Garland</td>
<td>Erin Fay</td>
<td>Suzette Ashby Larrabee</td>
</tr>
<tr>
<td><strong>Technology Delivery Manager</strong></td>
<td>Jan Sullivan</td>
<td>Jan Sullivan</td>
<td>Jan Sullivan / Marcy Tufarolo</td>
<td>Anne McDonough</td>
<td></td>
</tr>
<tr>
<td><strong>Application Delivery Manager</strong></td>
<td>Suantin Mach</td>
<td>Suantin Mach</td>
<td>Jerry Fritz / Janis Rogainis</td>
<td>Suantin Mach</td>
<td>Neil Oribe</td>
</tr>
<tr>
<td><strong>Scrum Master</strong></td>
<td>TBD - Jan Sullivan(for now)</td>
<td>TBD - Jan Sullivan(for now)</td>
<td>TBD - Jan Sullivan(for now)</td>
<td>TBD - Jan Sullivan(for now)</td>
<td>Neil Oribe / Anne McDonough</td>
</tr>
<tr>
<td>Role - Abbrev.</td>
<td>Role - Full Name</td>
<td>Definition</td>
<td>Total Time Commitment</td>
<td>Steering Committee</td>
<td>Core Team</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------------</td>
<td>------------</td>
<td>-----------------------</td>
<td>--------------------</td>
<td>----------</td>
</tr>
<tr>
<td>Executive Sponsor</td>
<td>Executive Sponsor</td>
<td>Deliver highest Business value Optimal cycle time from idea to realization</td>
<td>1 hour / quarter</td>
<td>1 hour / quarter</td>
<td></td>
</tr>
<tr>
<td>BPO</td>
<td>Business Product Owner</td>
<td>Owns scope for Business discovery Prioritize and incrementally realize Business value, ROI</td>
<td>2 hours / month</td>
<td>2 hours / month</td>
<td></td>
</tr>
<tr>
<td>PO (Release)</td>
<td>Product Owner (Release)</td>
<td>Build, packaging, verification, approval and deployment of code/product Make decisions about value criteria for each release</td>
<td>12-25 hours / month</td>
<td>2 hours / month</td>
<td>1 hour / 2 weeks</td>
</tr>
<tr>
<td>Business Lead/SME</td>
<td>Subject Matter Expert</td>
<td>Acceptance criteria Validation and implementation of Business value increment Contribute to requirements</td>
<td>10-23 hours / month</td>
<td></td>
<td>1 hour / 2 weeks</td>
</tr>
<tr>
<td>TDM</td>
<td>Technology Delivery Manager</td>
<td>The overview of the continual, incremental delivery of quality solution(s) Knowledge and learning leadership</td>
<td>12-25 hours / month</td>
<td>2 hours / month</td>
<td>1 hour / 2 weeks</td>
</tr>
<tr>
<td>ADM</td>
<td>Application Delivery Manager</td>
<td>Development of software functionality with integrity: Extensibility and maintainability in such a way that it can be delivered incrementally System evolution, architecture and design including environment Code quality (developer standards) and managing dependencies and/or collusion points Determine appropriate required skills/expertise for technical development Define engineering process, standards, and boundaries for Pods.</td>
<td>10-23 hours / month</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scrum Master</td>
<td>Scrum Master</td>
<td>Instill and nurture Lean-Agile practices across all levels of the organizational structure Coaching for visibility, transparency, and implementation of Lean-Agile practices Continuous incremental process improvement and Pod efficiency</td>
<td>15-23 hours / month</td>
<td>1 hour / 2 weeks</td>
<td>2-4 hours / 2 weeks</td>
</tr>
<tr>
<td>Pod</td>
<td>Core Pod (external dependencies are members of extended pod)</td>
<td>The whole team, including developers, testers, business analysts, and SMEs Work is composed of the stories and tasks for a specific release, enhancements, production support, and maintenance requests Members are responsible to produce and implement business value increment, for quality assurance, and continuous incremental improvement.</td>
<td>varies – depends on role and sprint work</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Quarterly</td>
<td>Monthly</td>
</tr>
</tbody>
</table>
Phase II: July – December 2013
Program-Wide Board
AGILEAN

Newsletter for UW Financial Systems Agile/Lean practitioners

UW Financial Systems Agile/Lean Vision
Scale Agile/Lean across financial systems to maximize on solutions using business-driven value criteria to ensure highest priority work is delivered.

January 2014

Spotlight: Aligning LEAN and Agile

The Procurement Services LEAN board milestones have been merged into the Ariba Agile reports by Laurie Hunt and Maribeth Rodriguez, as is shown in the following top line report. The top line report is a forecasting tool that allows you to analyze progress made and anticipate trends in delivering business value. The Ariba version incorporates the LEAN process improvement milestones (blue triangles in the chart below) into the report, giving a unified view of LEAN initiatives and progress and projections of Agile development.

POD Agile/Lean News

The Finance Program has completed Phase II of the Agile/Lean implementation effort, completing the following objectives that were defined as part of the Agile/Lean Coaching Agreement. Thanks to Maureen Nocken, Gwen Trentham, and Brent Helfman for their support in helping each Finance Program POD achieve these goals:

- Create and utilize a program-wide board
- Assess POD maturity and execute agreed to actions
- Implement feature burn-ups and top-line reports for all PODs
- Develop consistent processes for updating and maintaining the Book of Work
- Define and document ceremonies (sprint planning, grooming, etc.)

All-Program Board

The "All-Program Board" is a visual representation of the progress and status of each value stream’s top priorities. The board, which was developed through an iterative process of trial and error, shows for each value stream the:

- Topline and feature burn-up charts
- Velocity in units of story points per sprint
- Active work with percent completed, estimated total story points, and projected completion date
- Interactions with other initiatives
- Issues and risks

All-Program Board in UIT Tower Q2 Room 147

(continued on page 2)

All-Program Board (continued from page 1)

The board provides increased visibility into active work across the financial systems, and issues that need to be addressed. It is used regularly to report out at Core Team meetings and at the Finance Program’s "Scrum of Scrums" meetings. This information sharing will lead to increased agility in responding to changing priorities and their impact on project scope and dependencies.

Improved Alignment: Ceremonies and Scrum of Scrums

The Finance Program teams met and transformed common practices across the routine ceremonies (i.e. meetings) conducted in each two-week sprint. These include Planning, Demo, Retrospective, Daily Scrum, and Product Backlog Grooming. This was a good opportunity for teams to learn from each other about how these activities are conducted. See the List of Common Practices. The teams have also started meeting bi-weekly to share and review progress across teams using the status board pictured below (See Lean/Agile Pocket Guide for Scrum Teams by Net Objectives).

Finance Program Status Report

This bi-weekly status report provides an electronic update to project stakeholders of active items in the Finance Program Book of Work. Progress made during the last sprint and planned work for the upcoming sprint for each workstream is included. This report serves as an electronic view of the more up-to-date status available in room 147.

What’s Next

Through the adoption of Agile/Lean practices, the Finance Program is better positioned to adapt to shifting priorities and reprioritize team members as needed. This flexibility will be particularly beneficial in the case of the HR/FPayroll Modernization and the IT Service Management initiative. By keeping a common sprint cadence and having a shared Book of Work, communicating and managing team priorities across the program and sharing resources becomes easier among teams.

Phase II of the Agile/Lean Initiative will include:
- Continue advancing POD maturity
- Learning more common practices related to ceremonies, e.g., estimation, product backlog grooming, etc.
- Use Finance and HR/FPayroll Modernization system integration work to explore applying Agile/Lean across PODs

References

- Finance Program EDMIS Agile/Lean Initiative Home Page
- Agile/Lean Terms - Glossary from Net Objectives May 2013
- List of Finance Program Common Practices
- Lean/Agile Pocket Guide for Scrum Teams by Net Objectives
What about LEAN?

Open PO Balances
Top “Take Aways”

- Combined approach involving business and IT together
- Importance of Executive Sponsor Support
- Setting up Consistent Program Wide Sprint Cycle
- Defining and assigning consistent roles and related time requirement across program
- Getting the Book of Work Set Up; Continuing to refine scoring and weighting
- Maturity Model – Change is hard; need to adopt over time
Questions?