**Sample case study narrative:**

You are a new team member on a project at Freedom Rock Bank (FRB). The project is being completed using Agile methodology. While you have served on a few Agile projects, you have taken time to review the Agile method again to make sure you understand how the project is to work. After reading and understanding the FRB case, you are to create the following documents that are used regularly in Agile methodology project practices to support the case of the system update at FRB.

**Freedom Rock Bank** **Agile System Update Project**

Freedom Rock Bank is a small-town banking institution known for personability and small-town feel. FRB has 2 locations within Merrilton City, both connected by a central network, with access to the system controlled by individual profiles for login and data access. Lately the speed of the connection has dropped, with tellers and other customer service staff experiencing notable lags in data access, which has slowed down transaction times considerably. FRB has set aside $25,000.00 for a system-wide infrastructure and workstation upgrade. FRB has purchased the most up-to-date banking software, which includes teller/workstation file access, management data analysis, a lobby customer terminal, and mobile device banking capability.

The project is broken into three major goals as follows:

* Installation of the new software at all workstations and work terminals including software for better intranet connectivity between branches as well as the lobby customer terminals.
* Activation of the new mobile portal application for online/mobile banking.
* Launch the new systems and run them concurrently with the old system for a month to check for accuracy and troubleshoot any access problems.

User stories A1 and B2 were both successfully completed during the first sprint. User story A3, tellers being able to address customer overdraft issues, was supposed to be completed in the first project sprint; however, there have been issues with the project in many areas such as communication, meeting durations, mobile app not working and tellers who do not know how to operate the new software. This project is not moving forward successfully in all ways. The following are samples of comments from unhappy staff and customers in the last month.

**Stand up meetings not finishing on time:**

TO: IT Project Management Staff

FROM: Tellers at Main Street Branch

While we realize the daily 20-minute stand up meetings for the software project are important, with the meetings starting at 8:30 a.m. any delays finishing the meeting will require we leave early so we can open the front door for our customers. It is both annoying to miss part of these important meetings, and frustrating that our time is not being respected as we feel it should. Could we please have an agenda for these 20-minute meetings to ensure they finish on time at 8:50 a.m.?

Also, this is a reminder that you requested I send based on our discussion at this morning’s stand up meeting. I am forwarding in another message the report I received this morning from our old system showing all the transactions completed by our staff for the past week so you can see how that looks.

**Communication among all levels of staff lacking**

Internal Memo

MEMO from the desk of Ren Thomas, President of Freedom Rock Bank

To: IT Staff Management

It has been brought to my attention that not all staff at both FRB branches are receiving the weekly reports and project update information as expected. Please correct this oversight immediately so none of our staff feel uninformed about this critical project that affects the workload of all staff at FRB.

Sincerely,  
Ren Thomas, President

**Email complaint**

Unhappy with new Mobile Banking service

To: Ren Thomas, President FRB

From: Sara Sousa

Mr. Thomas,

Please take note of this email being sent to express my total dissatisfaction with the mobile banking app advertised as being available for all FRB customers. This app is junk and is not working correctly. Please get it fixed as soon as possible or stop promoting it to customers. After 35 years as an FRB customer, I am seriously considering moving my business to Alliah Bank, whose mobile app works seamlessly and allows my friends who use it to send cash directly to each other.

**Letter written to President Thomas**

December 10

Dear President Thomas,

I am currently an FRB customer of over 28 years, and I am very unhappy. I have called the bank several times in the last two weeks to get a checking account balance, to get information on when a check was posted to my account, and to put a stop payment on a lost check.

In each instance, the teller I spoke with took over 20 minutes to find the proper screen on your new software to complete my request. I do not have time to sit and wait for answers. I have wasted a total of 1 hour on the phone either on hold or waiting for the clerk to help me. Please fix this problem. I may be forced to leave if I can’t start getting the phone service that you used to provide.

Sincerely,

Charlotte Martin

Key for Backlog Stories:

|  |  |
| --- | --- |
| **Epic** | **Description** |
| A | Teller/Customer service staff | Difficulty is on a scale of 1–10, where 1 is the most difficult and 10 is the easiest. |
| B | Administration stories | Customer priority is on a scale of 1–10, where 1 is the lowest priority and 10 is the highest priority. |
| C | Customer user interface | Score is on a scale of 1–100, where the higher the number, the sooner the story should be addressed. |

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| --- | --- | --- | --- | --- | --- |
| **Epic** | **User story** | **Item** | **Difficulty** | **Customer priority** | **Score** |
| A | 3 | As a teller, I must be able to access customer bank accounts to fix problems with overdrafts. | 6 | 9 | 54 |
| A | 1 | As a teller, I need access to customer and database data as needed to do my work and answer phone requests. | 6 | 8 | 48 |
| A | 7 | As a teller, I must be able to access data to serve customers when they call the bank with questions. | 6 | 8 | 48 |
| C | 4 | Mobile user interface needs to provide reliable online banking access to check account balances. | 5 | 8 | 40 |
| B | 2 | As bank administration, I need to access customer loan data. | 4 | 9 | 36 |
| C | 5 | As mobile banker, I must be able to pay bills online. | 5 | 7 | 35 |
| C | 8 | My mobile banking app must allow me to deposit checks online. | 5 | 7 | 35 |
| B | 6 | As bank administrator, I need to access customer credit scores for potential loan applicants. | 3 | 7 | 21 |

Taking all the included information into consideration, your assignment for Task 2 is as follows. The IT staff has finished Sprint 1 and you have to complete the following documents:

1. A sprint retrospective reviewing activities completed and team performance. What should your team stop, start, or continue doing to improve performance through the rest of the project? Is there additional information that needs to be gathered in preparation for the next sprint?
2. An updated project backlog to prioritize and capture those user stories that can be found through interaction with team members and asking questions designed to capture specific information.
3. The Sprint 2 goal based on the project plans and the backlog report on incomplete tasks from Sprint 1. Choose a user story (or a couple related user stories) that you think can be completed during the next sprint. The plan then outlines the tasks to be completed in Sprint 2 to complete the selected user story. The listed tasks should include a time estimate and what skillsets or positions you are requesting for the people to be made available to carry out each task.
4. A communication plan outlining meeting details (date, time, etc.), including plans for the daily stand up meeting or other standard agile communications and some communications related specifically to working with users to gather requirements and complete the tasks described in the plan section.