

UNITED STATES  
PATENT AND TRADEMARK OFFICE



# Leveraging YOUR Virtual Dojo to Tackle BIG Transformation Challenges



# Introductions and the Plan for Today



# Meet Your Presenters



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# Today we will share

The Transformation Challenge at the USPTO

The Transformation Delivery Division (TDD)  
Challenge, Response and Journey

The Dojo EVOLUTION in the TDD to take on  
more complex challenges

The lessons we learned



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# We hope you take away

**UNDERSTANDING** of the key advantage of “learning by doing” in a Dojo vs. training and how this approach greatly increases application of new concepts and novel solutions to complex challenges.



# We hope you take away

**OBSERVATION** of how the virtual Dojo Process was applied to many key transformation challenges within USPTO with very positive outcomes and how the virtual Dojo continues to evolves to take on more complex changes over time.



# We hope you take away

**ANTICIPATION** as an audience member as to how the concept could be applied to accelerate your own transformation and unique challenges.

We Value

## **Enablement over Compliance**

A growth mindset over a fixed mindset

Outcomes delivered over activities

Collaboration over silos

Progress over Perfection

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# USPTO Challenge and Response





# USPTO Challenge

- Improve Product Quality
- Accelerate Value Delivery
- Reduce Costs

26 SDLC  
Stage Gates

1,000's of  
specialized  
staff assigned  
to jumbo  
projects

400+  
Automated  
Information  
Systems

6 month  
deployment  
cycle

# USPTO Response

- Streamline to a Product Environment
- Promote Product and Agile Culture
- Implement DevSecOps
- Create Product Teams

32 Lead Product Owners to drive Value Delivery

200 Product Teams with T-Shaped resources

4 Product Lines with 32 Products

100+ DevSecOps Pipelines

# USPTO Timeline and Journey

2019

- Began Product and Agile Teams Transformation

2020

- Started NWoW Dojos for all Teams

2021

- People to Teams Transition Completed
- NWoW Dojo's Completed for ALL teams – All teams have knowledge to crawl, some walking, a few running.

2022

- Establish TDD; Mature IT Planning Practices
- Focus & Mature – Product Maturity, Automation & Measurement; Develop Baseline Measures

2023

- Leveraged Dojo process more broadly to include IT planning, OKR dependencies
- Formally introduced OKR's

# **Transformation Delivery Division(TDD) Challenge, Response and Journey**



# TDD Leads Transformative Changes

Transformation	Learn	Unlearn
<b>Agile</b>	<ul style="list-style-type: none"><li>Completion of small, well defined pieces of work.</li><li>Timeboxed or WIP driven planning based on experience</li><li>New team roles, Product Owners managing the backlog, Scrum Masters driving the process</li></ul>	<ul style="list-style-type: none"><li>Big up front design, scheduling and funding</li><li>Project team "builds" and a different team "maintains"</li><li>% complete vs. capacity based, predictable delivery</li></ul>
<b>DevSecOps</b>	<ul style="list-style-type: none"><li>Frequent deployment to product via a pipeline</li><li>Automated testing and deployment</li></ul>	<ul style="list-style-type: none"><li>Legacy process that focused on infrequent, large deliveries</li></ul>
<b>Product</b>	<ul style="list-style-type: none"><li>Product Team Structure</li><li>Delivery is assumed, value is key</li><li>Owning the Product and Establishing a Product Roadmap</li><li>Understand and focus on their customers</li><li>New funding model</li></ul>	<ul style="list-style-type: none"><li>Project "thinking"</li><li>Delivery equates to value and "the end" of the project</li></ul>
<b>Cloud</b>	<ul style="list-style-type: none"><li>Cloud provider capabilities</li><li>OPEX optimization, "renting" vs "owning"</li></ul>	<ul style="list-style-type: none"><li>Optimizing "owned" assets</li><li>Reduced data center and server asset management</li></ul>
<b>Automated Governance (NEW)</b>	<ul style="list-style-type: none"><li>Providing security, audit and change management at the speed of delivery</li><li>Trusting automation to safeguard assets</li></ul>	<ul style="list-style-type: none"><li>Primarily manual processes to assure security, audit compliance and asset configuration</li></ul>

**... while keeping the day-to-day business humming along**

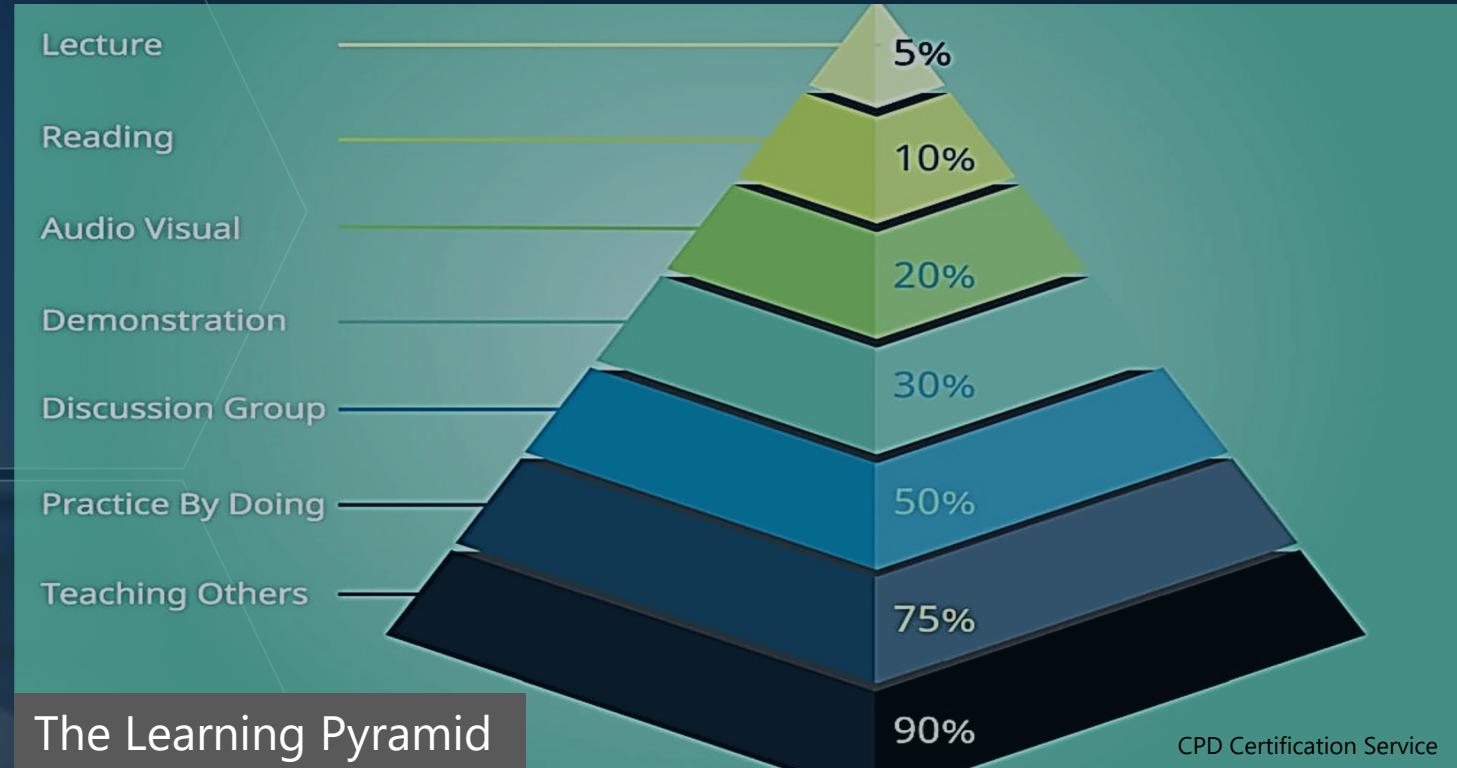


A **dōjō** is a hall or place for **immersive learning** or meditation. This is traditionally in the field of martial arts, but has been seen increasingly in other fields, such as meditation and **software product transformations**.

## Dojo Guiding Principles

- Safe place to learn NEW skills
- Shared TEAM Experience
- Meet the Team where THEY are at
- Apply new concepts to their OWN work
- Each week has a focus and a retrospective

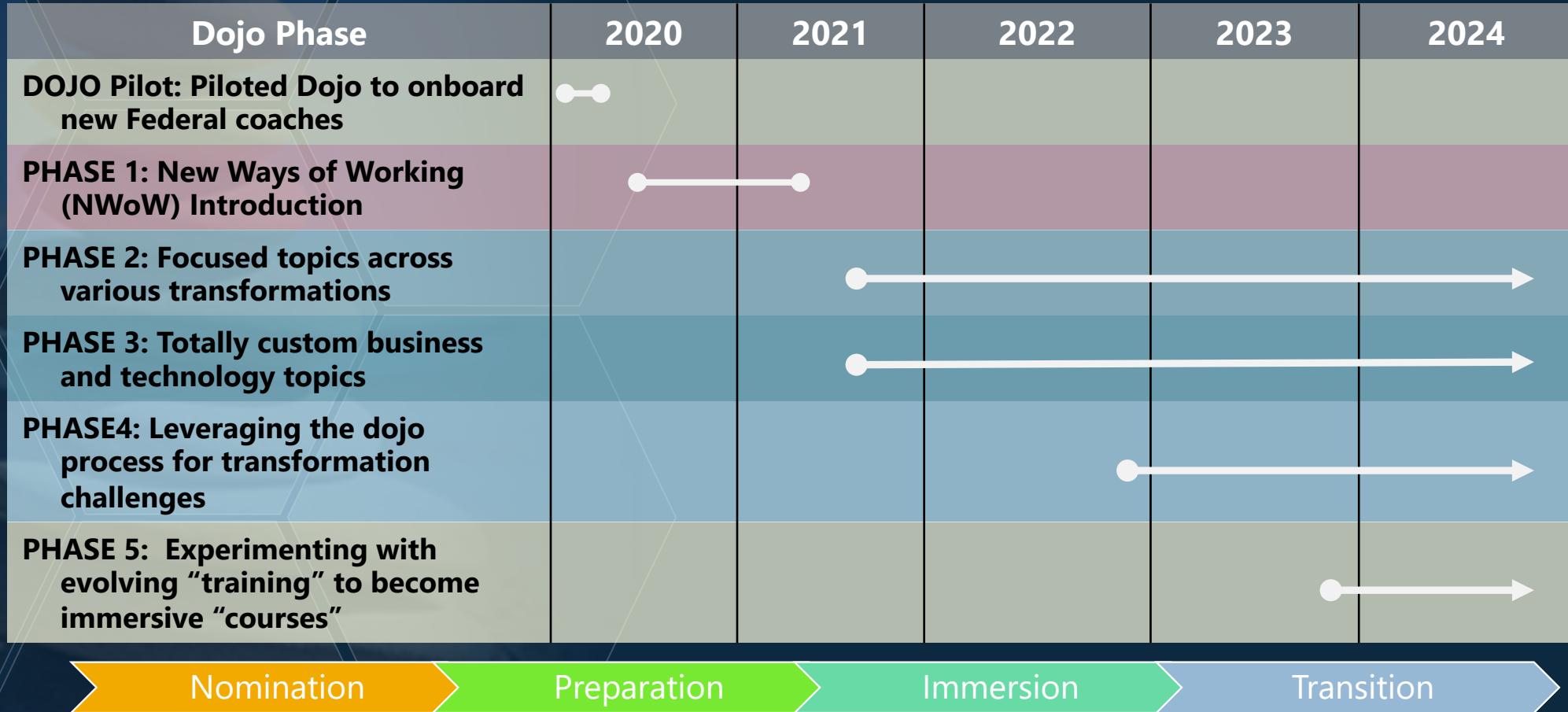
**The Dojo approach is focused on “learning by doing”, leading to high knowledge retention rates.**



**Immersive Retention rate:** Learning through experiences can increase knowledge retention by as much as 75%. Users are engaging more of their senses—seeing, hearing and actually interacting with virtual objects leaves much more of an impact than a simple slide presentation or even a video. *Forbes: Apr 27, 2022*

# Dojo Transformation Journey

## Many Phases – One Process



# Dojo Transformation Journey Phase 2 -

4

Dojo Phase	Description	Examples
PHASE 2: Focused topics across various transformations	Many teams needed help with specific, predictable topics. Continue to create "tailorable" offerings for teams to leverage	<ul style="list-style-type: none"><li>• Scrum NWoW QuickStart</li><li>• Scrumban NWoW QuickStart</li><li>• Healthy Backlogs</li><li>• Quarterly Planning</li><li>• DevSecOps – Continuous</li><li>• Cloud Intake &amp; Product Migration</li><li>• Routine Ops for Product Teams</li><li>• Describing Business Value</li><li>• Developing a Product Vision &amp; Roadmap</li></ul>
PHASE 3: Totally custom business and technology topics	Participants needed to leverage the focus on outcomes of the dojo to overcome a challenge	<ul style="list-style-type: none"><li>• Complex contract renewal process</li><li>• Cross functional team focused on Security Automation</li><li>• IT Planning was reworked into a week by week "dojo" process</li></ul>
PHASE4: Leveraging the dojo process for transformation challenges	Large, complex organizational challenges keep surfacing that require significant numbers of participants to learn/unlearn ever evolving skills.	<ul style="list-style-type: none"><li>• The Product Alignment for a large Product Line used the dojo to achieve a refined product catalog</li><li>• Evolution of Objectives and Key Results (OKR) to understand organizational value of delivered work</li></ul>

Nomination

Preparation

Immersion

Transition

# By the Numbers

## Completed Dojos by FY

**FY20(Q4 Only):** 1 Completed Dojo  
**FY21:** 12 Completed Dojos  
**FY22:** 22 Completed Dojos  
**FY23:** 30 Completed Dojos

## Participants by FY

**FY20(Q4 Only):** 62  
**FY21:** 1073  
**FY22:** 519  
**FY23:** 429

## Average Knowledge Gain by FY

\***FY20-21:** 38% and 37% Improvement in understanding of Agile and Rally.  
**FY22:** 68% across all Dojo Topics  
**FY23:** 107% across all Dojo Topics

## Average NPS by FY

**\*FY20-21:**      **FY22:**      **FY23:**  
Traditional: 95      Traditional: 76      Traditional: 93  
Positive Only: 61      Positive Only: 78      Positive Only: 86

**Take Away:** More people are having a Positive experience

## Lifetime Totals

**Participants:** 2083  
**Dojos:** 65  
**Average NPS:** 87  
**Average PO NPS:** 77

## Participants by Phase

**Phase 1:** 1135  
**Phase 2:** 948  
**Phase 3:** 5

## Dojos by Phase

**Phase 1:** 13 Dojos  
**Phase 2:** 50 Dojos  
**Phase 3:** 1 Dojo

## Average NPS by Phase

**Phase 1:**      **Phase 2:**      **\*\*Phase 3:**  
Traditional: 95      Traditional: 85      Traditional: 100  
Positive Only: 61      Positive Only: 82      Positive Only: 20

## Products

4 Product Lines  
37 Products  
271 Product Teams

\*FY20 data was aggregated with FY21 due to limited FY20 dojo offerings.

\*\* Phase 3 dojo data includes 1 data point

# Lessons Learned

Dojo must be a safe, non-judgmental place to learn new skills

Dojo processes are not insignificant and take time to mature

Dojo coaches need time to learn the Dojo processes

Dojo coaches must focus on the team challenges and outcomes, not what they may think is important

Dojo implementation has accelerated USPTO's transformation.



# Lessons Learned

Continuously and constantly adapted our approach to address our organizational needs. Scaling the immersion of the dojo to learning strategy and levering our immersive style to scale to bigger challenges (meeting the organization where they are with our services)

# Looking Forward

Leverage the dojo for business transformations

TDD leverages the dojo process for coaching services

The entire organization leverages the USPTO Dojo Process to come together to solve next generation problems in an immersive, collaborative, creative manner



# Here's what we're looking for:

Learn more about Automated Governance implementation experiences



# Thank You!



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Thank you!

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