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| **Engagement** | *Insurance Solutions* | **TCO Coach** | *Steve McDonald* |
| **Date From** | *March 24, 2020* | **Date to** | *March 26, 2021* |

## Accomplishments:

### Training

* + OSAM PO Training
  + Leading SAFe
  + SAFe for Teams
  + SAFe Product Owner/Product Manager
  + Story Sizing
  + Story Slicing
  + Essential Scrum

### Coaching

* + Re-align to OSAM (documentation and Gap Analysis review)
  + PI Planning Horizon Implementation planning
  + SAFe role alignment
  + HR Role alignment
  + Scrum Implementation
  + Essential SAFe Implementation
  + Portfolio SAFe Solution Train
  + PO Coaching
  + Scrum Master Coaching
  + Agile Dev Team Coaching
  + Agile Transformation Leadership Coaching

### Additional Services

* + Business Owner Expectations whitepaper
  + Staff Role and Career Path Management
  + Technical Documentation Analysis
  + Technology Agility Analysis
  + Technical Process and Practices Analysis
  + Filling in role responsibilities for:
    - RTE
    - STE
    - PM
    - PMD

### Next Steps Strategy Summary:

1. Intake Transformation
2. Product Model Transformation
3. DevOps and Development Practices Transformation
4. Testing and QA Transformation
5. Migration to UHG Rally Configuration for Reporting Integration
6. Delivery Lead/HR Role Transformation
7. Team Fixed Funding

### Overall Recommendation:

*The next steps are presented in the order of importance. Teams and scaled roles understand what they need to do to operate in an agile manner. Items in next steps outline critical change that need to be tackled by leadership to improve the agile operating environment. Between coaching and training, I believe I.S. understands how and where to transform next****. I do not recommend that coaching continue in this space*** *until leadership are able to value, prioritize, and own the above next steps work (with an emphasis on achieving items 1 and 2, and set into motion steps 3 – 6).*

**(Details Continue on pages 2-4 below)**

### Next Steps Strategy Details:

1. Intake Transformation
   * Goal: *Line up with SAFe intake with a focus on scope identification and away from waterfall style time and cost estimation*
   * Status: *Started*
   * State: *Tom is leading inspection into the intake process to make it more agile and move requirements away from big-upfront design and WBS-based budgeting.*
2. Product Model
   * Goal: *Align with real products and services and away from technology component team aligned to projects*
   * Status: Discussed, but *not started*
   * State: *The current orientation inhibits adding teams to real product trains. Agile Transformation across most instances including but not limited to the “first slice” effort are focused on “project implementation” and non-transformed components line up with continued dominance of waterfall expectations.*
3. DevOps and Development Practices transformation
   * Goal: *Embrace technical practices that align with empowered teams able to handle all the work required for the delivery of stories within a sprint*
   * Status: *Discussed, but not started*
   * State: *The current state of development operations and development practices remain unchanged from waterfall. Fundamental practice changes for typically Agile Dev Teams have been discussed but remains not approved by transformation leadership, continuing to affect the agile delivery of work. I have not observed Agile teams being allowed to change from their waterfall practices. Whenever we revisit this topic, I am told they should continue to do the work the way they did, and it cannot change because there are still waterfall teams with which they have to collaborate. Not transparent change work has been observed.*
4. Testing and QA Transformation
   * Goal: *Integration of Testing and QA activities into timely Agile Dev Team practices*
   * Status: *Discussed, but not started*
   * State: *Different testing techniques that integrate, optimize, and automate testing practices required to integrate quality in parallel with programming have not been transformed. Programming still happens in bulk and is handed off to testing as in the traditional SDLC waterfall model. This has been discussed but teams have been told not to change their current expected practices. Coaching presented an approach to get started in studying the impact of those missing practices, but no transparent work has been started.*
5. Migration to UHG Rally Configuration for compatibility with OSAM Reporting Hub
   * Goal: *Convert the Rally hierarchy back to the UHG recommendation to benefit from the implementation of Reporting Hub Integration*
   * Status: *New (not started)*
   * State: *The Rally hierarchy was changed in hopes to replace the need for an external tool like Aha. At that time, it was discussed with the coach and Steve Y. and recommended not to move out of the UHG configuration recommendation. These changes happened in any case and disabled Reporting Hub integration. This was recently discussed with Brian Z. in the context of setting annual regular “agile” Goals. Brian was interested in getting back to the larger community accepted goals and the tools that facilitate them (like Feature Cycle Time and the organizational hierarchy).*
6. Delivery Lead Role Transformation
   * Goal: *Converting the Delivery Lead to an HR position and moving technical SME activities to a team role.*
   * Status: *Started and observed*
   * State: *The Delivery Manager role was moved into the OSAM Delivery Lead role embodied by the team HR Manager. The goal was to move the staff in this role to an HR role that focused on growing the team rather than being a long-term technical resource guiding the team. The staff in this role are doing a great job transforming. There is a current risk of leadership expectations reverting and expecting the Delivery Lead role to focus on technical SME abilities (being the answer as opposed to figuring out where team members need to grow and investing their expertise and time into growing those resources) as well as content delivery. The delivery lead should be responsible to be sure the team can deliver through a skill-focused agenda – rather than driving content agenda. This is the POs job and would normally be complimented by a Delivery Lead helping the team mature across necessary skillsets and domain expertise. The role is observably confusing to the team because the Delivery Lead is a manager.*
7. Expansion of Release Train
   * Goal: *Add teams and backlog to existing Products and product trains, or add new products, backlog, and trains/teams.*
   * Status: *Not Started*
   * State: *Teams are still discussed in the context of project work and teams and trains seem confused with the idea that Projects have trains, rather than Products have a backlog (projects/initiatives) and teams work on the backlog within a train. This is solved by Next Steps 1 and 2 above. Without solving steps 1 and 2, teams are simply working in 2-week segmented waterfall project work (or PI-like 10 weeks of segmented waterfall work).*
8. Team Fixed Funding
   * Goal: *Move to product team annual fixed capacity budgeting*
   * Status: *Not started*
   * State: *Solving for Next Steps 1 and 2 above will stabilize products and teams enough to achieve this form of funding. You are not likely to be able to transform team funding until you are structured around product and product backlogs rather than continue in projects.*

### Notes to help with the context of above Next Steps:

* “Educating Up” – level-setting on Project to Product at the top of Insurance Solutions
  + Next Steps 1 and 2 are the largest organizational impediment to a smoother agile transformation. Agile Transformation at the team level is not able to be successful within a project paradigm and untransformed leadership and business levels. I recommend prioritizing this transformation. Anyone (all the way to the top) who can champion product enhancement (in terms of capabilities and features) needs to be included in this transformation. Without a commitment at that level, development operational changes will not have the impact you desire.
* Leadership transparency of transformation work for the organization
  + Once the Project to Product Paradigm can transform (Next Steps 1 and 2), the operational changes need to be the next priority (Next Steps 3 – 6). A lack of practice transformation has the same negative productivity affect as putting waterfall practices and expectations into scrum. This is known as “Scrum And” where you are simply layering additional “scrum” expectations on top of continued waterfall expectations and practices. Operational transformation needs to be transparent and accountable to the entire Agile Transformation Leadership. Being sure operational changes are transparent will help Agile Transformation Leadership see where real growth and change should be happening. It will help leadership see if they have a team-level impediment to growth, or if the team is being held back by an organizational operational expectation from non-transformed leadership levels. From testing to analysis and programming practices, the goals as well as the transparency, prioritization, and valuing of those transformation goals will help the teams grow.
* Agile Implementation Growth Strategy
  + As you can see, 2-3rds of the major remaining agile transformation factors are not something the teams are empowered to handle on their own. It is about changing the top-level expectations, and then changing the agile operational expectations for the teams – in that order. Teams understand the basic scrum-cycle and RTEs understand the Essential SAFe PI implementation and can help the organization embrace those cycles. Both of those are being impeded by the first 2 Next Steps which the leadership need to own.

### Detailed Coaching Recommendation:

1. Need: *Agile Transformation Leadership should work together to present the Project to Product Transformation Need to top leadership and the business. Having discussed this will the Agile Transformation Leaders over the last year, it appears you know what needs to change. In my estimation, you are 100% ready to manage this change.*
   1. Coaching: *No coaching service recommendation*
2. Need: *Operational technical, transformation should be your large next focus with extreme transparency, training, leadership re-alignment, and change management. In my estimation, you are 100% ready to manage this change.*
   1. Coaching: *No coaching service recommendation*
3. Need: *Once I.S. leadership have made a commitment to transform and align on next steps 1 and 2 as well as set into motion owning a plan for next steps 3 – 6, coaching can help in traditional ways more effectively.*