JAMES K SMITH, Project/Program Management, Business Engineering, Agile Consultant, Transformation Lead, SAFe RTE, Scrum Master, AI-Automated Backlog Development, Organizational Effectiveness, Software Engineering, Risk Management, Organizational Change Management (OCM), IVV liaison.

Any location considered.
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See my book: AGILE V2 COACH'S FIELD MANUAL, available on Amazon, or free on Github.

My Miro boards at miro.com
Samples from an AI RAG template system I've developed for automated backlog generation, cost and completion forecasting

SAFe 6 Practice Consultant (current SPC - 24906958-1135): enabled to teach all SAFe certifications (**SAFe SA, SAFe SSM, SAFe SASM, SAFe POPM, SAFe SGP, SAFe ASE, SAFe ARCH, SAFe RTE, SAFe SDP, SAFe LPM, SAFe SP, SAFe APM).**

Certified Scrum@Scale Practitioner (current RSASP-5479328)
CSM (current 504356)
CSPO (current 512533)

Teams and Value Streams: 25 years with Legal, construction, marketing (RTE), UX, software, engineering (SM), healthcare (RTE,SM), financial services (RTE), manufacturing, banking specific includes fraud, digital payments, regulatory reporting, banking consumer technologies (RTE, SM).

Organizational Leadership Summary: 20 years in Project/Program Management, with roles as Director, CTO, VP focusing on Organizational Effectiveness, Organizational Change Management (OCM), Risk Management, Process Re-engineering, lean portfolio management, startup operations. **State government leadership, IVV liaison, Fed Gate Review prep**, Management and selection of external vendor teams.

Technical Leadership Summary: 25 years in Software development, Database design, data migration, mission critical systems, api backends, DevSecOps**,** CI/CD, TDD/BDD, Stand-up and management of 1) Functional, 2) Enabler, 3) Subsystem 4) Small, high-autonomy teams. Toolchain experience: Golang, .NET, Delphi, Dynamics 365 (D365), javascript, C, HTML, CSS, Github, Mercurial, SVN, PHP, Coldfusion.

Designed and led technology vetting approaches to include application of learning and discovery best practices through backlog elaboration, with heavy emphasis on short iterations (keeping mistakes and failures small). Effective technology vetting should have a foundation of three pillars: 1) Ability to quickly audit internal and provider solutions (ex. ffiec.gov) , 2) Understanding how risk management leads to opportunity enablement (see my paper: 3 Lines Model Done Agile , 3) a technology vetting practice that includes radical transparency and line-of-site with leadership.

Selected Presentations (authored and delivered by James Smith) available for download from my Github Repo at Github.com:

- A Simple Transformation Plan – all you need (plus some patience) to move your company to agile product delivery.
- Ceremonies for High Performing Scrum Teams – instructor led by James Smith.
- PI Planning and Future State – Your guide for executing PI Planning, but with an eye toward the optimizing the future.
- The 3 Lines Model Done Agile – The Institute of Internal Auditors 3 Lines Model adapted to Agile Product Delivery.
- The DoR-DoD Contract – Definition of Ready and Definition of Done work together to form a very powerful tool to for great outcomes.
- A System of Risk and Dependency Management – James Smith shows how the Value Elaboration Stream, Leadership line-of-sight, and strong Scrum teams are the key.
- Agile organization assessment package – Fully programmable assessments for the organization and its delivery teams.
- Burnup chart package – Programmable spreadsheet and instructions that provide forecasting for release dates and cost. Suitable for any application that has team velocity data.
- State Gov Challenges and Solutions – My experiences and takeaways from working with state gov Medicaid E&E programs.
- This resume on Github.com.

Summary Timeline at a glance:

Organization	Title	Term	Clients,Market,Vertical
Increase Signal	Owner/CTO	Nov 2023 - Current	Product

			management and application development. Products include SitelineOS business operating system (under development)
Infosys	Program Management, Change management, Scrum Master, Agile Consultant,Transformation Lead, SAFe RTE, DevOps	Feb 2019 – Nov 2023	Ford Motor, Northern Trust Bank, Voya Financial. Citi Bank, ATT
Grid-Sky Consulting	Owner, Principal Consultant, Agile Coach, Scrum Master, Kanban Admin, OCM Consultant	May 2015 – Feb 2019	State of Alabama, CSX, L3/Harris, Bank of America
Global Treasury Systems	Scrum Master, Director of Development, Treasury Software	2011 – 2015	Treasury software market worldwide
Marketron	Lead Developer, TvSCAN	2010 – 2012	TV stations nationwide
DXM Technologies	Executive VP, CTO	2005 - 2009	Security Software Startup
USCertifiedLetters	Chief Technology Officer	2001 – 2004	US, notable: State of California, State of Nevada, US Postal Service
TapSCAN	Chief Developer	1989 - 2000	TV Stations and Cable Networks worldwide

Professional Experience Detail

Technology Development, Project Management   Increase Signal, Inc Nov 2023 – Current
Leading ongoing development of the SitelineOS Business Gaming System. This company also serves as a C2C billing option for consulting clients. Organizational Change management consulting covering work processes, tools, and techniques, backlog development using AI/Azure, Kanban, 5s, Value Stream Analysis, Lean Six Sigma, Agile, Waterfall, SDLC.

Organizational Change Management, Program Management, Scrum Master, Agile Consultant, Transformation Lead , SAFe RTE, Devops Automation
                                Infosys Feb 2019 – Nov 2023

Thought leader and execution lead for 14 practice areas:

- **Kanban/Scrum processes/training/expertise:** Substantial experience building/training 100 scrum/kanban teams, and designing value streams around

these teams. See ex. [Value Stream Graphic](#) Special use of starter kata to help teams understand process and delivery.

- **Investment Portfolio:** Structured build out of investment portfolio using market, SWOT, and objectives and key results analysis (OKR). Developed initiative guardrails with prioritization based on my own formula (Cost of Barriers, see my book).

- **Executable/Integration Portfolio:** Measurable work-item elaboration intended to develop enough signal that it can be executed by delivery teams with confidence. Developed templates effective for quickly elaborating all parts of the backlog taxonomy.

- **Delivery Portfolio:** Developed techniques, tactics, and procedures for enabling parallel work and delivering executable facts with certainty and stability. Expertise in Kanban, Scrum processes, and developing high performing teams using those processes.

- **Devops Automation holistic approach from left to right:**
  o Helping humans get out of their own way at the exploration level in the value stream. Leading to…
  o Eliminating need for human intervention using automated build and testing tools at the integration and delivery levels in the value stream.

- **Organizational Change Management (OCM):** Designing **organizational operating models**, along with facilitating and mapping **Prosci ADKAR** model to those organizational models. Using 5s approach, special emphasis on using starter kata (practice exercises) to replace legacy behaviours and people management with people-centric delivery systems.

- **Training Library:** Author and presenter of complete Agile Product Delivery library, created on behalf of clients. Curated curriculum and samples available on request.

- **Assessment Models:** Designed and implemented custom, programmable assessments for Delivery Teams, Integration Value Stream Teams, and whole Organization. Samples available on request

- **Technical Coaching**: Coaching software development teams on modern software engineering practices, devsecops, CI/CD, technical excellence, acceptance testing techniques. TDD (code quality), BDD (tests to show behavior), ATDD (tests to show behavior that expected business value has been delivered, as specified in acceptance criteria and Definition of Done).

- **Taxonomy Design:** According to James, too much runway in the backlog incurs duplicated work. Too little runway ends up throwing a giant snowball at delivery teams. For best value stream flow, James has designed and implemented many backlog taxonomies for F250 organizations.

- **Team Topologies**: Designed teams facing different demands. Some teams require much more upstream preparation to accommodate existing cognitive load. Other teams thrive on more value elaboration mixed with execution. Some teams have highly variable cycle times, so they need to use a kanban approach typically. Other teams consistently deliver a cycle time of one, so they execute as scrum teams. James has expertise in both processes, and will guide team formation using these processes to best match upstream elaboration delivered by product owners.

- **External Vendor Teams**: Experience vetting, drafting SOWs, and integrating external teams into client system of delivery. To this end, there are one of three ways James handles this integration. 1) Full integration, given client security/disclosure/hardware constraints, hybrid system supported by client proxy roles, and "black box" approach. Vendor is a blackbox, but they will be given a status on a work-board so that cycle times can be measured.

- **Release Strategies:** James has implemented Develop on Cadence, Release on Demand approaches using a release inventory scheme in the value stream design. This approach allows for both effective system demos (thanks to teams sharing a common cadence), higher throughput, and release flexibility given market conditions and available inventory.

Additionally:

- **Organizational Value Stream design and execution using these five fundamentals:**
  - **Teams** – Assembled teams for all levels of the value stream, including leadership Investment teams, Portfolio Integration teams, technical and non-technical delivery teams.
  - **Backlogs** – substantial experience assembling value elaboration stream backlogs in Rally, ADO, Jira, VersionOne, and manually, all achieving a continuous ready state and supporting execution using multiple teams in parallel.
  - **Working, tested product** – integration of behavior driven and test driven development to ensure the highest quality increments are available to the delivery pipeline.
  - **Flow** – Expertise in designing workflows that balance holding costs with transaction costs, and executed using multiple teams working in parallel.
  - **Risk Management** – Developed robust risk management systems that reinforce transparency and continuous improvement.

- **Substantial experience with all major backlog/ALM tools, including ADO, Rally, Jira, VersionONE**.
- Guided best practices for Quality, Risk, and Dependency management, meeting government compliance, cloud solutions, manufacturing, security, devops, **FFIEC** audits, **state government IVV reviews**.
- **Experience with Fed Gate Reviews.**
- **Experience with Azure Cloud migration.**
- Experience setting up [Scrum@Scale](#) Teams, including **Executive Action Team** and **Executive Metascrum**.

Clients include Ford Motor (coached SAFe PI Planning), Dearborn, MI (Feb 2019 – Jun 2021), Northern Trust Bank (SAFe LPM, SASM, SM, SA, POPM, APM courses taught), Chicago, Ill (July 2021-Mar 2022), Voya Financial (SAFe RTE and RTE trainer), Remote (Mar 2022- Dec 2022), Citi Bank, Tampa (Dec 2022 – June 2023), ATT, Atlanta (Jul 2023 – Nov 2023).

Owner, Organizational Change Management Consultant, Agile Coach, Scrum Master, Grid Sky Consulting   May 2015 – Feb 2019
Portfolio, devops, training, strategy and execution consulting for multiple clients. Highlights:

- **Instructor, L3/Harris (Feb 2019):** Delivery of custom value stream training content.

- **Instructor, Scrum Master, Bank of America (Dec 2018 – Feb 2019):** Provided primarily training of transformation for Regulatory Reporting division.

- **Enterprise Transformation Coach, CSX Railway (Jan 2017 – Dec 2018):**
  Leading full transformation of organization from team to portfolio level. Program includes classroom training, team coaching, leadership portfolio coaching and consulting, organizing communities of practice, coaching of Kanban and Scrum processes, consulting on DevOps pipeline and CI/CD. Coaching and training provided for over 1000 people and 70 teams, with a backlog of 650 projects.

- **Executive Practice Officer, Project Manager, Development Manager, Medicaid MMIS State of Al. (May 2015 – Nov 2017):**
  - Development manager for $40m project spanning multiple state agencies, and covered development of Medicaid, CHIP, SNAP, TANF, DHR, Elderly and Disabled applications.
  - Managed Information Architecture team.
  - **Moved legacy mainframe application to Azure cloud with adherence to MITA standards and conditions.**
    - **Effort required a very careful data mapping/ETL/warehousing and data cleansing process to move from the legacy 370 core to MSSQL. While this effort took a significant amount of time, it allowed us to resolve a substantial number of claimant and claims duplication and conflicts that existed in the legacy system.**
  - To support separation of PHI environments, introduced creation of "Theory of Operations" references for development to operations interface.
  - Project was first state in country to get "FedRamp" certification for Azure cloud.

  Key factors for success in delivering this project:

  - Organization consisting of 106 contractors, and 10 scrum teams was built ground up by myself and others on Executive Leadership Team.
  - Organizational structure was based on a team of teams as opposed to hierarchy.
  - Whole organization took responsibility for individual team success/failures.
  - IVV (Independent Verification and Validation) was treated as part of the organization and fully integrated. This provided huge operational benefits to organization.
  - Daily Scrum of Scrums format provided enhanced communication, transparency, and management of risk.
  - All team members/roles were expected to be SMEs for their respective scope. Executive Leadership Team were all qualified to teach organizational roles, with frequent classes being offered.
  - All backlogs were expected to be continuously ready for execution by scrum teams. Backlogs met the continuously ready standard using the rule of 3's:
    - 3 sprints worth of ready stories, inside of
    - 3 months of estimated stories, inside of
    - 3 quarters of stories into the horizon.
  - Continuously ready backlogs promoted high-performing teams, delivering certainty and stability.
  - All system testing was fully integrated into each sprint, leading to catching defects much earlier in the value stream. UAT became a confirmation of testing already done.
  - Heavy emphasis on transparent risk management. High-performing teams acted as the "canary in the coalmine." If any team raised a risk, leadership immediately stepped in to assist.
  - All releases to production environment were handled in a highly fault-tolerant, "run-book" fashion.

- State level PMO was accustomed to more traditional Waterfall type delivery. Our organization developed ways to map agile product delivery to various legacy artifacts, such as Master Schedules and Work Breakdown Structures. This approach was so effective, PMO eventually changed name to Project Metrics Office, limiting their scope to measuring delivery success, instead of project planning.
- Finally, the Executive Leadership Team discovered that at a minimum, they should meet with the agency Director once a week to validate what was being delivered. This was in tandem with a full review day every two weeks with all scrum teams involved, culminating with a full system review.

- Additional learnings/opportunities:
- MOU opportunities were explored with State of Mississippi, using our system for their Medicaid agency, but not realized during my time with the agency.
- It's important to understand the full impact of moving state employees to an updated system. User/operational experience is guaranteed to change, so we had to institute a thorough OCM communication plan to create training materials and communicate those materials to state employees. This effort was critical for transition and sustainability.
- Vendor management was broken into 3 strategies :
  1. Full integration into scrum teams, given client security/disclosure/hardware constraints,
  2. Hybrid scrum system supported by internal proxy roles, and
  3. "Black box" approach. Vendor is a blackbox, but they will be given a status on a work-board so that their cycle times can be measured.

Chief Technical Officer, Global Treasury Systems   May 2011 – May 2015
Oversee development of SmartTreasury treasury management software, which manages cash position, funds transfer, debt and investment, foreign exchange, bank account management.

- FX functionality intended to minimize risk and maximize returns on currency exposures via the following capabilities:
  - Exchange forecasting
  - Hedging/arbitraging
  - cash flow management
  - Liquidity optimization
  - Of course, SWIFT transfers were built into the system as well

Experience prior to 2012:

- **Lead Developer, TV Media Software, Marketron 2010 – 2012**
- **EVP, Security and Encryption Applications, DX Machine, Inc 2005 - 2009**
- **CTO, Certified Mail Automation, US Certified Letters 2001 – 2004**

Additional Information

Author, "AGILE V2 COACH'S FIELD MANUAL"

Community Involvement

- Speaker
- Article Author

Competencies/Education

Regulations

- HIPAA, PHI Compliance

Industry Standards and Methods

- SSAE 16

Process Know-how

- SCRUM, Kanban Expertise

Education

- University of Alabama, Birmingham