

## JAMES K SMITH

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Project/Program Management, Agile Consultant, Transformation Lead, SAFe RTE, Scrum Master, AI-Automated Backlog Development, Organizational Effectiveness, Software Engineering, Risk Management, Organizational Change Management (OCM), State Gov (Medicaid), IVV, SaaS development leadership, FedRAMP experience, MITA Standards

### WORK EXPERIENCE

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#### **Increase Signal, Inc**

**November 2023 - Current**

*Software Development, Fractional CTO, Project Management*

Leading ongoing development of the SitalineOS 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, Kanban, 5s, Value Stream Analysis, Lean Six Sigma, Agile, Waterfall, SDLC.

#### **Infosys**

**February 2019 - November 2023**

*Organizational Change Management, Program Management, Scrum Master, Agile Consultant*

- 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).
- Vetting drafting SOWs, and integrating external teams into client system of delivery.
- 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.
- Designed and implemented custom, programmable assessments for Delivery Teams, Integration Value Stream Teams, and whole Organization. Samples available on request.
- Designed and implemented many backlog taxonomies for F250 organizations.
- Guided team formation using Kanban or Scrum processes to best match upstream elaboration delivered by product owners.
- Assembled teams for all levels of the value stream, including leadership Investment teams, Portfolio Integration teams, technical and non- technical delivery teams.
- Assembled 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.
- Led integration of behavior driven and test-driven development to ensure the highest quality increments are available to the delivery pipeline.
- Designed workflows that balance holding costs with transaction costs and executed using multiple teams working in parallel.
- Developed robust risk management systems that reinforce transparency and continuous improvement.
- Implemented Develop on Cadence, Release on Demand approaches using a release inventory scheme in the value stream design.
- Developed templates effective for quickly elaborating all parts of the backlog taxonomy.
- Structured build out of investment portfolio using market, SWOT, and objectives and key results analysis (OKR).
- Designed organizational operating models, along with facilitating and mapping Prosci ADKAR model to those organizational models. Used 5s approach, special emphasis on using starter kata (practice exercises) to

replace legacy behaviours and people management with people-centric delivery systems.

- Author and presenter of complete Agile Product Delivery training library, created on behalf of clients. Curated curriculum and samples available on request.
- Coached 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).
- 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.

### **Grid Sky Consulting**

**May 2015 - February 2019**

*Owner, Agile Coach, Scrum Master, Organizational Change Management Consultant*

Portfolio, DevOps, training, strategy, and execution consulting for multiple clients.

- **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, Organizational Change Management Consultant (OCM), Scrum Master, Software Development/Agile Transformation Coach, 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. Moved legacy mainframe application to Azure cloud with adherence to MITA standards and conditions. To support separation of PHI environments, introduced creation of “Theory of Operations” references for development to operations interface. Introduced Spotify “feature toggle” design pattern. Project was first state in country to get “FedRamp” certification for Azure cloud. Toolchain included .NET, MSFT Dynamics 365 (D365), SQL Server, Golang. Used a blend of scaled scrum and SAFe v3. Led SaaS development of D365/Azure migration.
- 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.

- o 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.
- o Continuously ready backlogs promoted high-performing teams, delivering certainty and stability.
- o 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.
- o 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.
- o All releases to production environment were handled in a highly fault-tolerant, “run-book” fashion.
- o 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.
- o 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:
  - o MOU opportunities were explored with State of Miss, using our system for their Medicaid agency, but not realized.
  - o Vendor management was broken into 3 strategies:
    - Full integration into scrum teams, given client security/disclosure/hardware constraints,
    - Hybrid scrum system supported by internal proxy roles, and
    - “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.

## **Global Treasury Systems**

**May 2011 – May 2015**

*Chief Technical Officer, Scrum Master*

- Oversee development of SmartTreasury management software, which manages cash position, funds transfer, debt and investment, foreign exchange, bank account management

**Additional State Gov Work:** As CTO of USCertifiedLetters, developed hybrid certified mail automation systems for States of California, and Nevada. In this effort, James collaborated extensively with the USPS.

## **COMPETENCIES / CERTIFICATIONS / EDUCATION**

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- University of Alabama, Birmingham
- CSM (current 504356)
- CSPO (current 512533)
- Certified Scrum@Scale Practitioner (current RSASP – 5479328)
- SAFe Program 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).
- Process know-how: SCRUM, Kanban Expertise