**PI System Demo – Flow & Go Team – Release 2**

Background

The Flo and Go team was stood up to enable the Forge agile teams to embrace and enact agile project management and governance into their processes. PI 1 emphasized the development of two primary products – the Agile 101 guide and the Forge Survivor Guide – both designed to help frame and document how work will be accomplished in the Forge. The team also stood up the NSERC JIRA and Confluence sites to best streamline data/knowledge management across the various agile teams. This activity was designed to lay the foundation for a collaborative, innovative, and agile culture capable of making measurable and iterative progress towards prioritized objectives. The continued efforts of this team enable the type of information transparency, real time feedback and adaptation, and clear governance required to make an effort of this magnitude successful.

Rationale for Change

Change management is incredibly difficult to achieve, but time and time again organizations don’t invest the right time and energy into ensuring the change is adopted and successful. Moving to agile is a large culture shift for every single person involved, it requires changing the way we work, the way we plan, the way we report, the way we communicate, and with that the need for agile coaching is critical. Coaching provides a resource to agile teams as they work through the natural ebs and flows of change. Two critical pieces of the agile culture are transparency and metrics.

* In today’s environment, data, information, and knowledge is stored everywhere and nowhere at the same time. We have systems that house certain pieces of data, and those systems don’t talk to others, we have knowledge in the brains of experienced teammates that is lost when they switch roles, and we don’t share information readily. Converting to an open and transparent environment in Confluence/JIRA, we enable transparency across the board, enabling rapid onboarding, effective collaboration, and searchability.
* Metrics and Reporting are two things that are widely mis-used and mis-understood across the board. Focusing the teams to really think about the questions their work must answer from multiple different angles, and automating metrics capture of those metrics is critical to show and communicate progress. We have to shift from focusing on timelines and schedules, and convert to adopting the agile reporting KPI’s available for software delivery.

Flo Go PI 2 Efforts – Big Picture

In support of the Forge activity, the Flo and Go team had four major “Epics” including:

1. Agile Coaching. This covered dedicated time throughout the PI to work with each of the agile teams to help guide them through the agile transformation for their respective product lines. This included managing the Scrum of Scrum level PI ceremonies such as the weekly SoS meetings, the PI planning/demo sessions, and facilitating scrum meeting best practices. In addition, the team worked with teams to get their tasks decomposed into epics, features, and stories that aligned with those across the teams to streamline planning and reporting.
2. Data Management & Transition. This covered the major transition of data and information into the NSERC JIRA and Confluence environment from CVR Teams. The goal was to built out the Confluence structure, and migrate the information from CVR Teams and other locations into the wiki structure.
3. Metrics & Reporting. This covered the initial identification, mapping, and capture of key performance indicators for the Forge activity as a whole. Leveraging tools within the Atlassian suite, the goal was to leverage industry best practices for metrics, and streamline the metrics capture process for the effort.
4. Forge CONOPs. This covered the actual process mapping and documentation efforts for how the Forge will operate start to finish. The goal was to work with the various agile teams that each owned various parts of the process, work with them to map out their pieces, and make available process maps, flows, R&Rs, etc for how software will be developed within the Forge.

Progress Made to Date

* Agile Coaching – Provided agile coaching support to each agile team as required to help operate the ceremonies, set up and function in JIRA/Confluence, and plan using Epics and Features – laying the foundation for an agile culture
* Standup of JIRA’s “Big Picture” Application which enables the ability to pull data from within JIRA to report key metrics, timelines, and priorities to leadership.
* Established first round of key performance metrics for the Forge activity, mapped them to the major objectives and agile teams, and worked through collection and reporting mechanisms.
* Converted all documentation completed in PI1 (Agile 101 guide, Survival Guide, etc) into Confluence for streamlined data management across the teams in a single environment

Coming up Next

* The team quickly de-prioritized the Forge CONOPs effort as there were too many dependencies on the agile teams. Those efforts will pick up again in PI 3
* Metrics and Reporting – Focus will move from identification to the actual capturing and reporting of those KPIs for the Forge
* Agile Coaching – Continued coaching and hands on support to encourage agile cultural shift and success of metrics coming out of Big Picture