



SimAgile Orientation Guide

Benefits Administration Agile Team (BAAT)

Overview

Welcome and congratulations!

You are the Scrum Master of the Benefits and Administration Agile team.

At this point, the product team has been formed, initial product backlog, and high-level architecture has been completed. Michael Russell, VP Human Resources, has assigned Farley Gnu as the Product Owner for this extremely sensitive work. Farley and his initial team have done some preliminary work to create the backlog and technical architecture. Below you will find some key background information, team member profiles and context as you get ready to dig in and deliver value.

Organization context

O. M. Smith, the CEO of Uniworld, recently announced a major update to the intranet-based employee benefits and payroll system. It will provide easy and more complete access to employee benefit and payroll information; including many more self-service selections. O. M. Smith asked Michael Russell to be the product manager of this project which is to be implemented within the Uniworld internal website. A new team has been launched to help execute this work. The name of the team is Benefits Administration Agile Team or “BAAT” as the team members have named it.

Farley recently received a memo from Michael that describes the nature of the work and his concerns. Michael has met with Farley to provide some initial context and his perspective. Michael high level objectives are:

- The site to house both benefits and payroll data and yet accessible to all of the employees.
- The site to be intuitive to use so that it requires little to no training.
- The site to be optimized for employee access, but there also needs to be access to certain employee benefit and payroll information that can only be updated by restricted HR individuals.
- To stress the importance of bringing a minimal viable version of the site on-line as soon as possible because O. M. Smith has made this one of his performance objectives for the quarter. (Michael was visibly nervous when talking about O. M. Smith’s demands. There are rumors that Michael is contemplating retirement and does not want anything to jeopardize his retirement income.)



Welcome message

Hi folks, I'm Michael Russel, the Vice President of HR for Uniworld.

I would like to personally welcome you to the Benefits and Admiration product team. As we embark on integrating our recent acquisition of Whistle While You Work, we have a need to immediately and dramatically update our employee benefits and payroll experience. O.M. Smith, our CEO has asked me to be the product manager of this work stream.

It is imperative that our team delivers a minimal viable product as soon as we can. O. M. Smith has a personal interest in this work, and it is now one of our merger integration objectives. I understand we have had recent success using an agile and Scrum development methodology and I would urge you to be nimble and adjust to the evolving requirements.

I've been working with our Product Owner, Farley Gnu, to finalize the product vision and you will find that information on the team collaboration space. It will provide more details on the objectives and product roadmap. Please familiarize yourself with the current product backlog.

I have asked the various functional resource managers to make available to you a core team of personnel that will form this product team. They have assured me that these individuals have the necessary skillset across the entire tech stack.

Again, welcome to the team and good luck. I'll be in town next week and let's then.

Cheers and see you soon,

Michael



Team Playbook

Team Name: Benefits and Administrative Product Team (BAAT)

Product Owner: Farley Gnu, Director Payroll and Benefits

Sponsor: Michael Russell, VP Human Resources

Product Team Objectives:

To provide secure employee access to all personal benefits and payroll information and self selections. The site will also provide all necessary background information and constraints.

Description:

The Benefits and Administrative product work is part of the human resource department's effort to provide more immediate access and control to individual employees over their own personal information. This web site is needed to upgrade the HR functions and to help it be more responsive to the needs of the Uniworld employees.

The customer of this website is the Human Resources organization of Uniworld. The end user is Uniworld's employees. They will have input into the website development and provide important feedback during the project. The company has budgeted \$50,000 dollars for the development of the portal. HR has stated that it needs a minimal viable website within 2 months in order to coordinate the website launch with the annual open enrollment and mailing and emailing of supporting brochures to all employees.

Requirements:

Build a customized website for instant access to all employee benefit information. The website will be accessible 24 hours a day, 7 days a week and can be utilized by employees and spouses from home, by multiple branch office locations and by employees on the go. The website will be a single access point for all employee benefits including medical, dental, prescription, vision, flex-spending accounts and 401K options.

To assist the human resource department and to help employees, the website will be comprised of a full set of documents including benefit plan coverage, enrollment information, plan descriptions, claim forms, links to provider directories, frequently asked questions and answers, government requirements, and anything that your employees need regarding their benefits. The website will offer online enrollment options and access to the Uniworld data management system currently in place.



The site will also include the following features:

- W-4 maintenance
- Employee Benefits: Federal and State requirements with concise explanations
- Downloadable sample Employee Handbook
- Hundreds of downloadable forms, policies and checklists
- Clear explanations of commonly used terms such as COBRA, ERISA, FMLA, HIPAA through an HR Dictionary and Glossaries of Terms
- Frequently Asked Questions

Minimal Viable Product:

The minimal viable product requested includes: (stories marked as “Story is required” are part of the MVP)

- Benefits and Payroll Access website
- Supporting documentation

The MVP is not expected to have the following:

- Provide the website data or references (to be populated from the source systems)
- Provide supporting website training brochures or information
- Provide follow-on support (transitioned to the helpdesk)
- Perform follow-on analysis for improvement

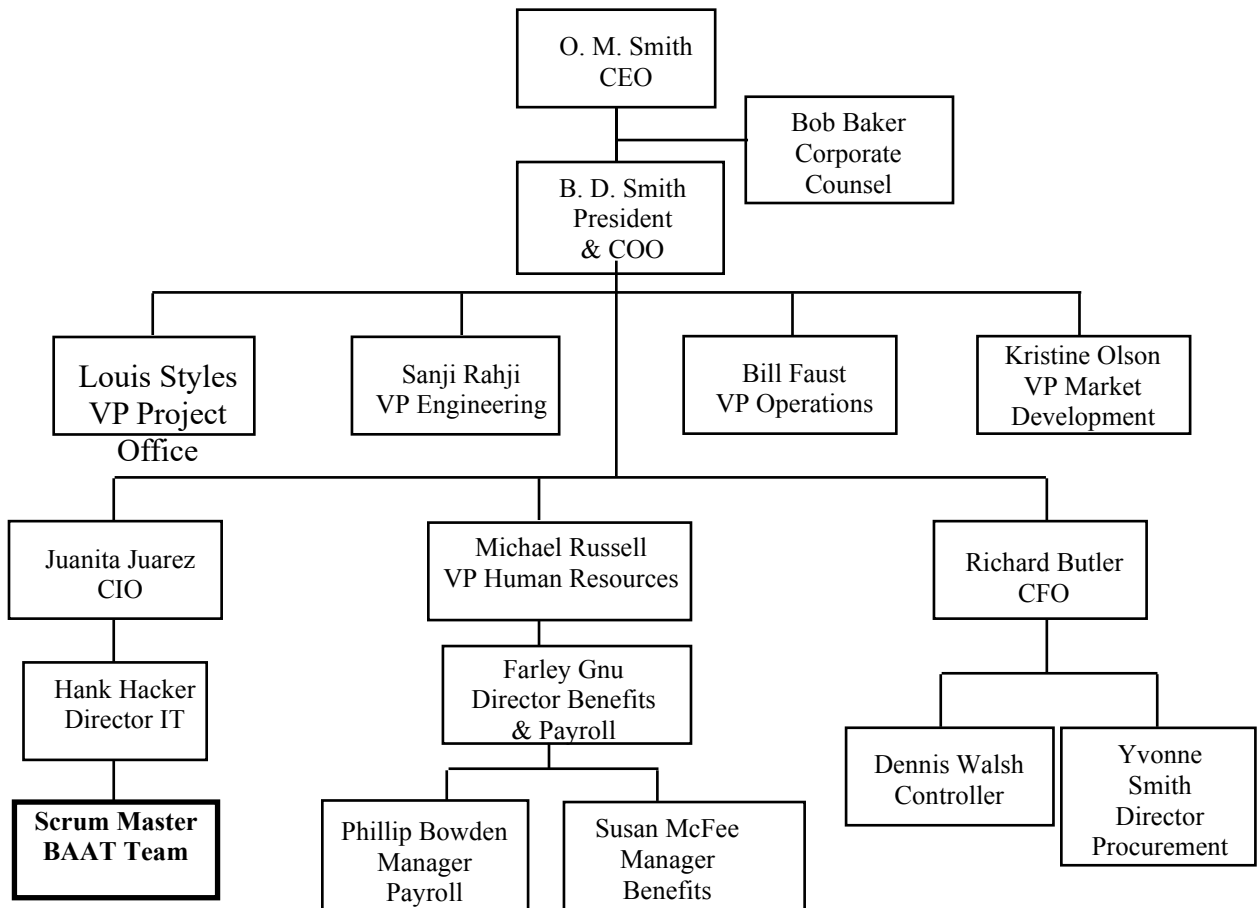
Performance:

The website must be capable of responding to requests in less than 2 seconds and work with all the major browsers.

Success Criteria:

The minimal viable project is delivered by the end of Sprint #4.

UNIWORLD ORGANIZATION CHART





Team member skills

- Full stack developer
- QA Tester
- Scrum Master
- Product Owner

Stakeholders:

Michael Russell, VP Human Resources, **Sponsor**

early 30's, hard charging, smart, doesn't provide any more info than necessary, suspicious, can earn his respect and trust over time

Phillip Bowden, Manager of Payroll, **Customer**

60's, very formal, very smart, well read and very technical

Susan McFee, Manager of Benefits, **Customer**

40's, not happy that Farley was promoted over her, has an excellence balance of work and home life, top HR person for many years, well liked in the org

Farley Gnu, Director of Benefits and Payroll, **Product Owner**

30's, new to HR, very respected by the most in the organization, has an IT background



Initial Team Composition

The product team has been formed with five full stack developers and five QA testing team members.

The team member profiles will provide you with the information to best decide how to communicate with and understand each of the developers/testers.

Here are the names by skill:

Full stack developers:

- Barbara Elo
- Kamal Amin
- Maria Tidwell
- Yee Lee
- Russel Reit

QA Testers:

- Katina Malke
- Juma Gadach
- Nick Zimmerman
- Sladi Petrov
- Fred Saville

Each team member will have an ability to perform the secondary skill. Developers will work at 80% on testing, and *testers* will work at 50% on development.