

Portfolio, Program, Project, PMO, Process Specialists  
“Exceeding Expectations”

**Challenges In Transitioning To An Agile Environment**  
**NY SPIN Meeting, April 17, 2012**

Marc H. Fiedler  
Director, PM Solutions  
P5 Management Consultants  
Email: [Marc\\_Fiedler@Hotmail.com](mailto:Marc_Fiedler@Hotmail.com)

**Project Goal:** Create an application that will satisfy Global Regulatory laws to fairly price securities to clients and securities held within the corporation.

**Background:** 94 feeds are used to gather bid/ mid/ ask prices for securities. Not all feeds are consistent. The application will gather all the data from the feeds and determine outliers and other metric data and present the data to Valuation Analysts. The Analysts will then decide on the best prices and document accordingly.

**Execution:** The project was supposed to end April 2011 using an Off-Shore Vendor to perform most of the work. A traditional waterfall development approach was employed.

In April 2011 the application was NOT close to going live. The Vendor could not even provide an end date. The client severed their relationship with the Off-Shore team and brought it In-House to develop and test. A new internal management team was brought on-board. Through herculean efforts of the client team, a minimal application was delivered in December 2011 far exceeding reduced expectations of Management and the Users.

To build the remaining functionality of the application, the new management team transitioned from the traditional waterfall development approach to Agile Scrum.



*The Program is on-target to complete by August 2012*

# Teams Not Co - Located

## Challenge Details

4 Teams

2 Vendors plus client organization

4 locations

9.5 hours time zone difference

Numerous inconsistent Holidays

## Impact

Standup meeting could not occur.

Fluid transfer of work does not occur well.

Timings of meetings always inconvenient for at least 1 team.

## Solution

Standup held for each team.

All teams participate in AM New York/ PM India Call with Product Owner and other Stakeholders.

Weballiance and Global Crossing used to share same screen in all locations.

Holidays known in advance and planned around.

Electronic Whiteboard used.



***Affect of Solution:*** Solution was acceptable. Separate Scrums not as efficient as one. Time zone difference allowed us to extend the working day to accommodate tight testing windows.

# Teams Not Co - Located

## Challenge Details

4 Teams

2 Vendors plus client  
organization

4 locations

9.5 hours time zone  
difference

Numerous inconsistent  
Holidays

## Impact

Standup meeting could not  
occur.

Fluid transfer of work does  
not occur well.

Timings of meetings always  
inconvenient for at least 1  
team.

## Solution

Standup held for each team.

All teams participate in AM  
New York/ PM India Call  
with Product Owner and  
other Stakeholders.

Weballiance and Global  
Crossing used to share  
same screen in all locations.

Holidays known in advance  
and planned around.

Electronic Whiteboard used.



***Affect of Solution:*** Solution was acceptable. Separate Scrums not as efficient as one. Time zone difference allowed us to extend the working day to accommodate tight testing windows.

# Lingering Waterfall Mentality

## Challenge Details

After migrating to Agile from Waterfall, staff was still thinking in terms of waterfall.

They were trying to perform mini-waterfalls within each 2 week sprint.

## Impact

This thinking made the team much more inefficient.

It led to peaks and valleys in the usage of each resource.

A lot of overtime hours were booked near the end of each sprint.

Due to Friday releases, many weekend hours were burned.

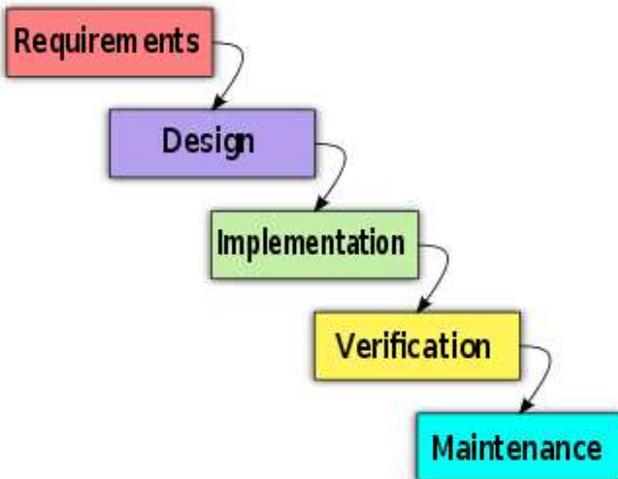
## Solution

Progressing towards solution.

Staff is thinking less like this.

They are picking up the next task in each story as the previous task ends. They are not waiting as before.

Generous Comp. time was awarded.



*Affect of Solution: Getting less inefficient. More stories are ending at the end of the sprint.*

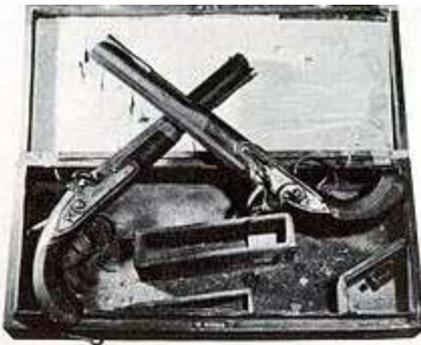
## Challenge Details

Conflicting tools mandates from different governance organizations.

Many different tools used.

Multiple migrations of PM Data.

Tools used: Excel, HPQC, Rally, JIRA, GreenHopper.



## Impact

The various mandates has caused the managers to spend many hours on the phone trying to come to a decision.

The team has spent a lot of time re-entering Items in tools (or in meetings to explain to others how to convert the data).

Management needs to take more time to create Burn Down Charts etc. in a less efficient manner.

## Solution

Progressing towards solution.

HPQC is used to log Stories and Defects. JIRA (with the GreenHopper add-in) is used to log tasks against stories.

JIRA is used as a basis for manually creating Compliance and Governance Artefacts.

Separate client group is still finishing our JIRA to HPQC Connector tool.

***Affect of Solution:*** *Solution is currently acceptable. It will be better when the connector is in place. There is still too much manual document preparation for managers.*

## Challenge Details

Many Stories do not end in the sprint because they were not sized properly.

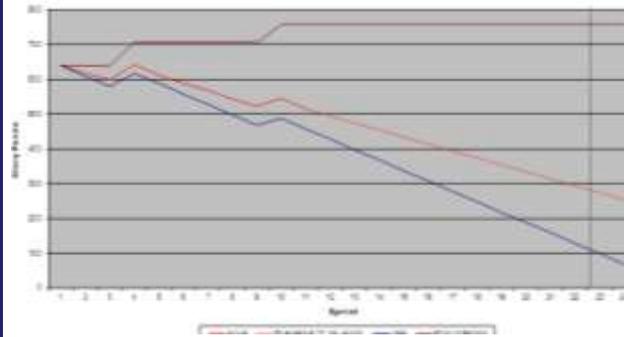
This caused a volatile velocity due to not finishing stories in one sprint and then completing many partially completed stories in the next sprint.

Multiple teams definition of a story point were not the same.

## Impact

Difficult to plan.

Difficult to manage work for a sprint.



## Solution

As we discovered this problem, we classified each current story as an Epic.

Each Epic was divided into much smaller stories.

More due diligence was used in getting story estimates in the planning meetings.

A common definition of a story point was implemented.

**Affect of Solution:** Many more stories are completed in each sprint. Far less are started and not completed. Velocity is more stable. Management Artefacts make more sense.

## Challenge Details

Product Manager really knows the business well.

He likes to get involved in all details.

He frequently changes agendas of meetings and makes decisions that usually others on the team should make.

He adds patch releases between already scheduled Sprints using the same resources.

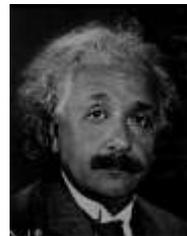
He is empowered do this as all team members report to him.

## Impact

Product Owner is very active in ensuring final product is what was requested.

There is no problem in engaging him.

The Scrum Masters and Agile PM have difficulty in properly managing the workload and the Product Owner.



## Solution

Managing the Product Owner better.

Explaining the negative affect of these actions.

Proving through metrics the poor performance of the team when a patch release gets added “ad- hoc” into the work load.

Engaging Agile Coaches as a third party advisor.

***Affect of Solution:*** *Workload is more consistently completed and managed. Less time spent in meetings. Sometimes we need to actively get the Product Manager re-engaged.*

## Challenge Details

Belief that Agile is just an excuse to create less documentation.

Different Governance, Compliance, PMO teams have contradictory mandates.

Similar information requested in different formats.



## Impact

Considerable amount of unnecessary, redundant work for managers.

Considerable amount of unnecessary management meetings to iron out differences.



## Solution

Prove the value of Agile Methodology by documenting the frequency of application enhancements and increased End- User Satisfaction.

Agree with various organizations on a common set of deliverables.

Created an Opt Out process.

Educate groups on Agile Deliverables.

***Affect of Solution:** Solution is in progress. Still too much duplicative work and Management Meetings to resolve issues.*

## Challenge Details

Many teams are involved in migrating an application to production at the client organization.

They all have deadlines and timings of data, forms, authorizations, etc. that may span more than one sprint.

Many internal team activities are required that are not necessary in every sprint.

## Impact

Sprints with release activities were not handled well.

Very little functionality was delivered.

All Agile metrics were misleading.

## Solution

Create a Sprint before each release that focuses primarily on release activities.

Create release related stories and Epics.

Only create functionality during these sprints so developers are constructively active.



**Affect of Solution:** Solution works well. Release Stories can be re-used before each release.