

# Coaching Opposing Sides : A Transformation Journey

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Lean Kanban Program Management



**LeanKanban**  
North America 2016





From Here

Planting Seeds





To Here

Nursery  
of experiments





## From here to there



The Road goes ever on and on  
Down from the door where it began.  
Now far ahead the Road has gone,  
And I must follow, if I can,  
Pursuing it with eager feet,  
Until it joins some larger way  
Where many paths and errands meet.  
And whither then? I cannot say.

- Bilbo Baggins

Light of Eärendil's star - Kanban, Agile  
Samwise Gamgee - Servants of change

A close-up photograph of a young green seedling with a curved stem and two leaves, growing out of a red onion bulb in dark soil. The background is a blurred green and blue.

**All beginnings, have a  
beginning**

# Context

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identity, credibility, building trust, competence, planting seeds, sources of dissatisfaction





# Cultural Assessment



## • ORGANIZATION CULTURE

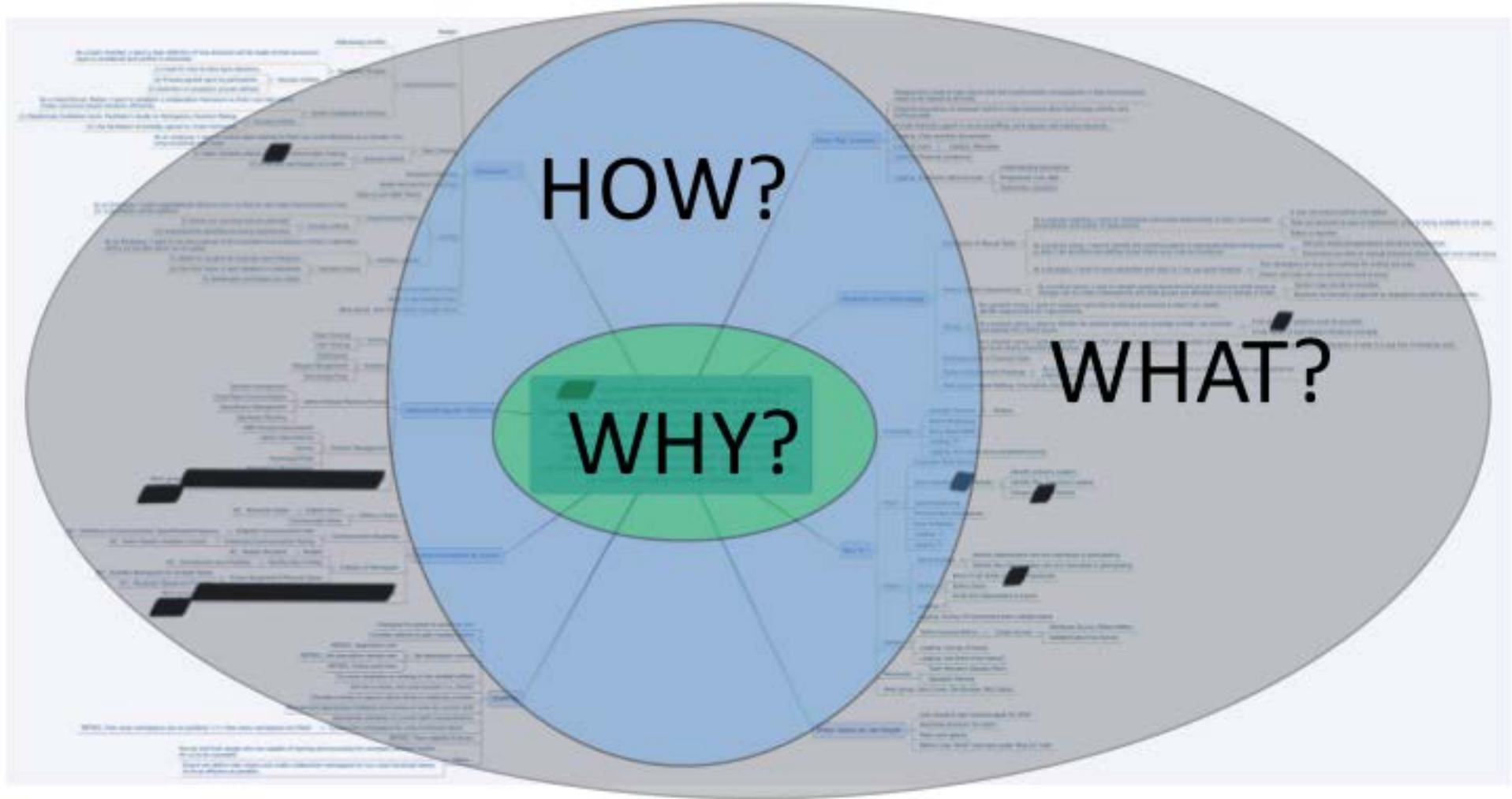
- Mostly Control culture, that is company and reality oriented.
- Company-wide culture for a company with strong regulatory responsibilities should be a strong Control culture.
- A few spots for Collaboration and Competence show a shifts in leadership style.

## • TEAM LEVEL CULTURE

- Mostly in Control or Cultivator.
- Some teams are incubators for cultivating people and exploring possibilities.
- Diagonally opposing cultures in the Schneider model often fail to understand each other. Potential for conflicts when “cultivator” team culture runs up against “control” organization culture. Strong facilitation and awareness can help.



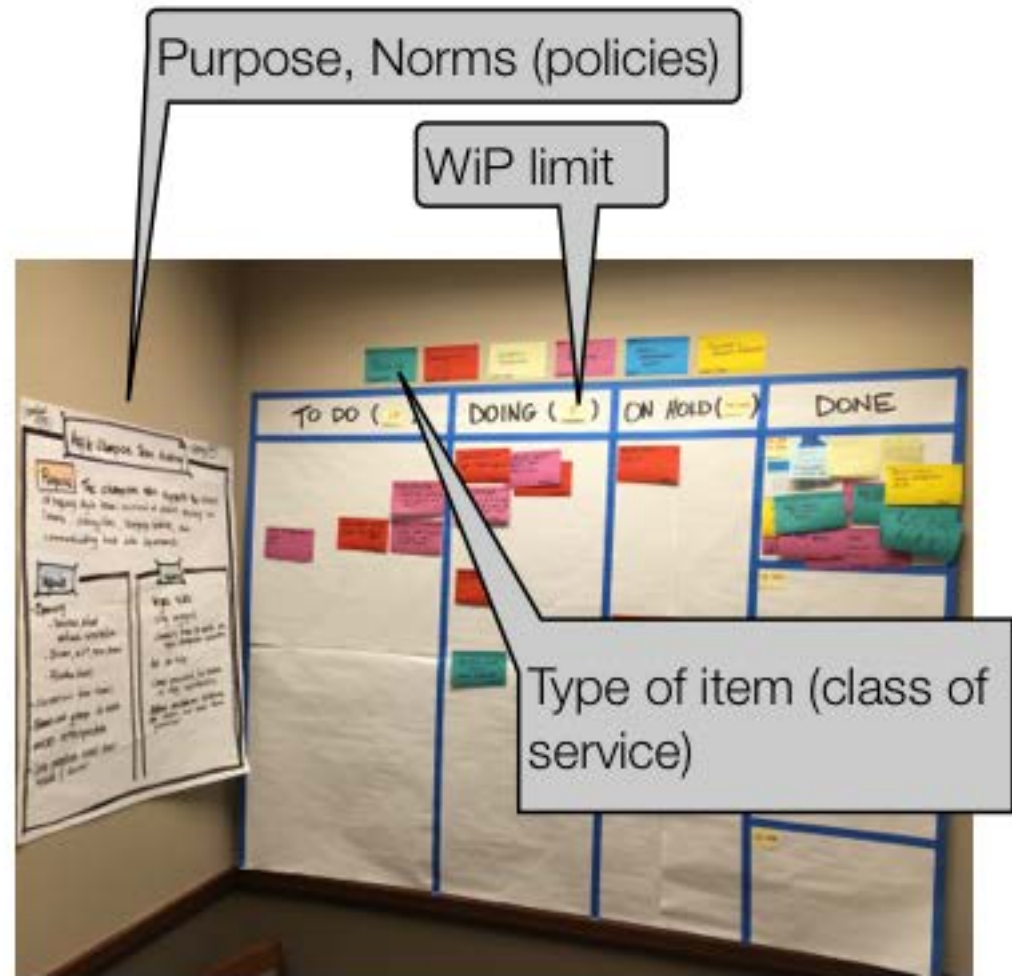
# Agile Transformation StrategyMap™



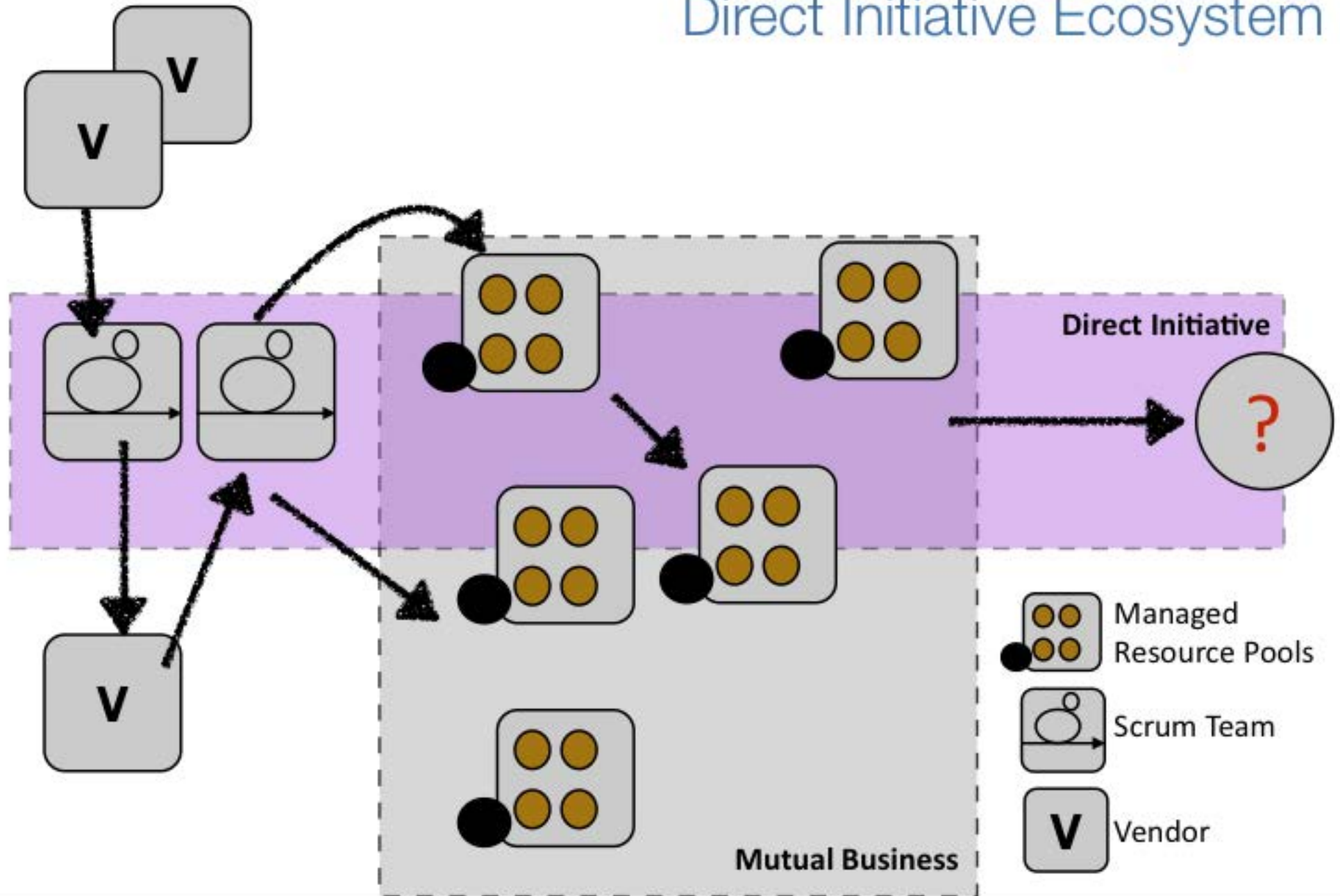
# The Fellowship : Agile Champions Team

“Self-selected group from business, IT, Operations who are passionate about continuous pursuit of better way”.

*“Is this right for the company”*



# Direct Initiative Ecosystem





# Challenges

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- Emerging scope, no end in sight
- Many requirements and sub-requirements in progress, with no demonstrable end-to-end functionality
- Date “polling” reporting mechanism. (very large “red-yellow-green” style meeting)
- Continuously shifting delivery dates
- Operational readiness is non-existent. Each group is developing to their own understanding of operational environment.
- Lack of transparency, or inability to measure and track progress at program level

Everyone is busy, but nothing is getting “done”.

# Work on the right things, at the right time with right people

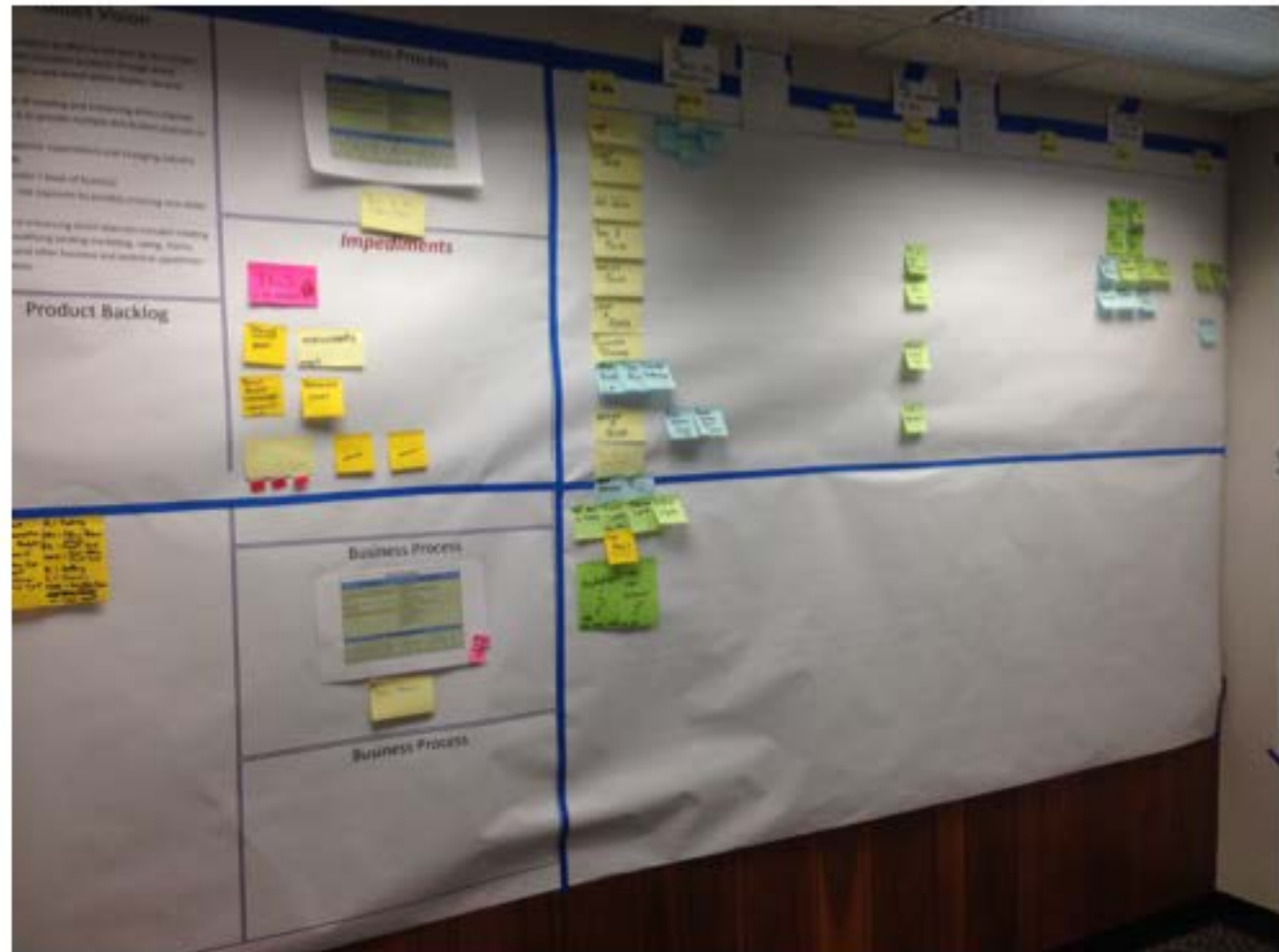
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Operating Mantra, Visualize, Prioritize, Organization Habits, not-reject experiments

# Visualize (STATIK)

Big Empty

Questionable  
Buy-in





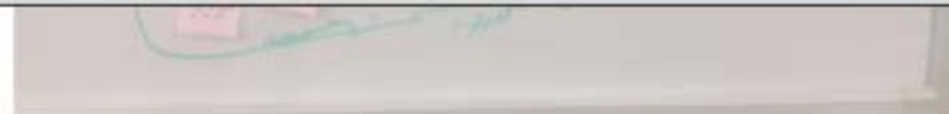
# Visualize - Socialization and Gamification

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- First Engage emotionally
- Quiz game
- Improvement game



What is needed to report on program progress?  
How does the program room capture program status?  
What will improve your understanding of overall program status?



# Analyze Demand (STATIK)

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- Power of legitimacy : Barry (SME)
- When demand is unknown, set expectations
- Focus on end-user, and ignore technical “schisms”, and also organizational silos
- Test First principle
- Simple, Humble start : User Acceptance Test plan
- Hierarchy of end-user focused requirements

|                             |                                       |
|-----------------------------|---------------------------------------|
| Business Process            | ex: Quote                             |
| Theme (Functional feature)  | ex: Select Coverage                   |
| Epic (requires integration) | ex: Allow customer to modify packages |
| User Story (team level)     | ex: As a .. I want .. So that ..      |

# Visualize : End-State & Work-in-Progress

Work in progress  
board

UAT skeleton





# Analyze Capability (STATIK)

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- A complex eco-system with Agile and traditional resource pools do not have compatible measures
- Freeway analogy
- How many “Epics” (cars) make to the finish line, every week?
- Baby steps towards Cumulative Flow Measurements



# Release Candidates

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- A fully tested, functional product that satisfies a meaningful business benefit.
- It is better to get progressively less wrong, than to bet the farm on a long-shot
- The term - “Candidate” helped traditionalists to look past big-bang delivery.



# But Why? - Single Page Roadmap

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- When can we launch new insurance company?
- What is a meaningful program status?
- What business level trade-offs do we need to make?
- What, When and Where should we advertise?
- How do we align operational reality with business objectives?
- How do we manage business risks?
- How do we build capability to support and manage changes when we go live?

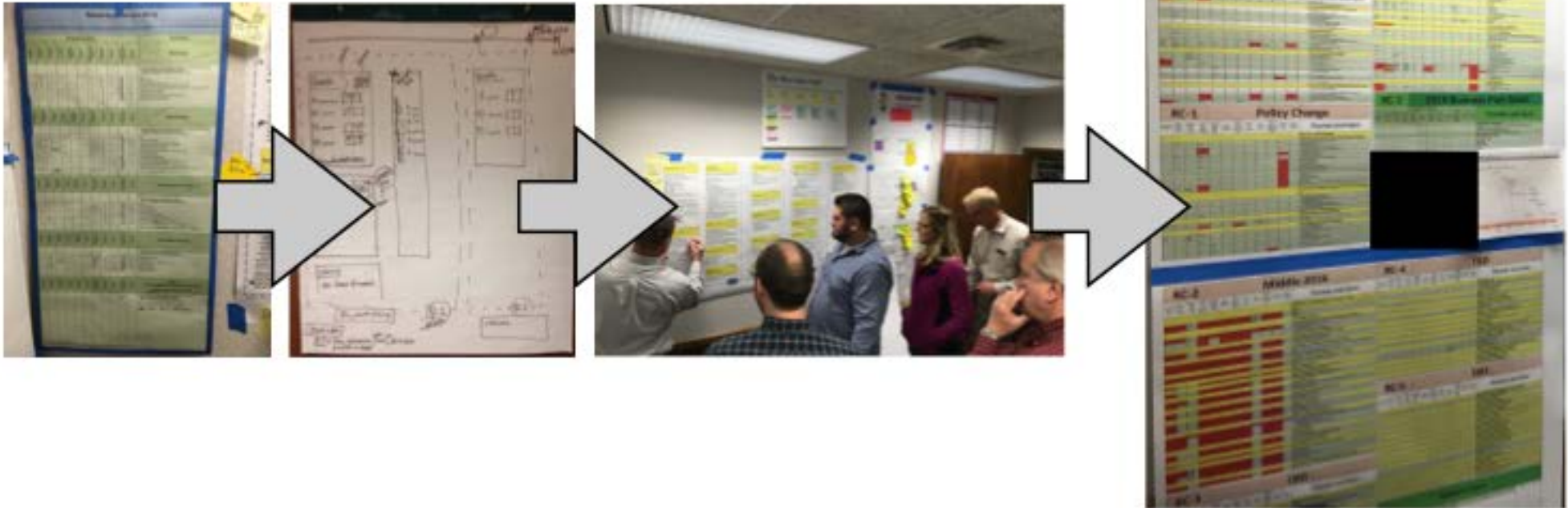
Single Reference document to engage and escalate to  
C-level leadership at Steering Committee

# Engage pack-leaders, Engage emotionally

## Lesson Learned:

None of my ideas are good, engaging others only makes 'em better

Iterate, Iterate, Iterate





# Stay Focused on Strategic Intent

**Roadmap Definitions**

- RC - 0**  
Program risk and expense management. Functionality that requires vendor support or has known risks capable of impacting the development process.  
Subset of RC - 1 and potentially other release candidates.
- RC - 1**  
Minimum legal requirements to operate, sell and service Auto Insurance in IL.
- RC - 2**  
Critical functionality desired to establish positive presence in the online-direct channel.
- RC - 2 Business Plan**  
Required functionality to achieve by year-end 2016.
- RC - 3, RC - 4, RC - 5...**  
Program Backlog. Priority of individual Themes within this Backlog may change over time.

**Roadmap**

**Release Candidate Zero (RC-0):**  
Items in this category are a result of managing risks and expenses. Our only functionality requiring vendor assistance as quickly and efficiently as possible. RC-0 and potentially other release candidates. It is not enough functionality to start transacting insurance business.

**Release Candidate One (RC-1):**  
Items in this category are things necessary to do a full cycle test. Our goal is to create this test in early February of 2014. This is a minimum functionality to start transacting insurance business.

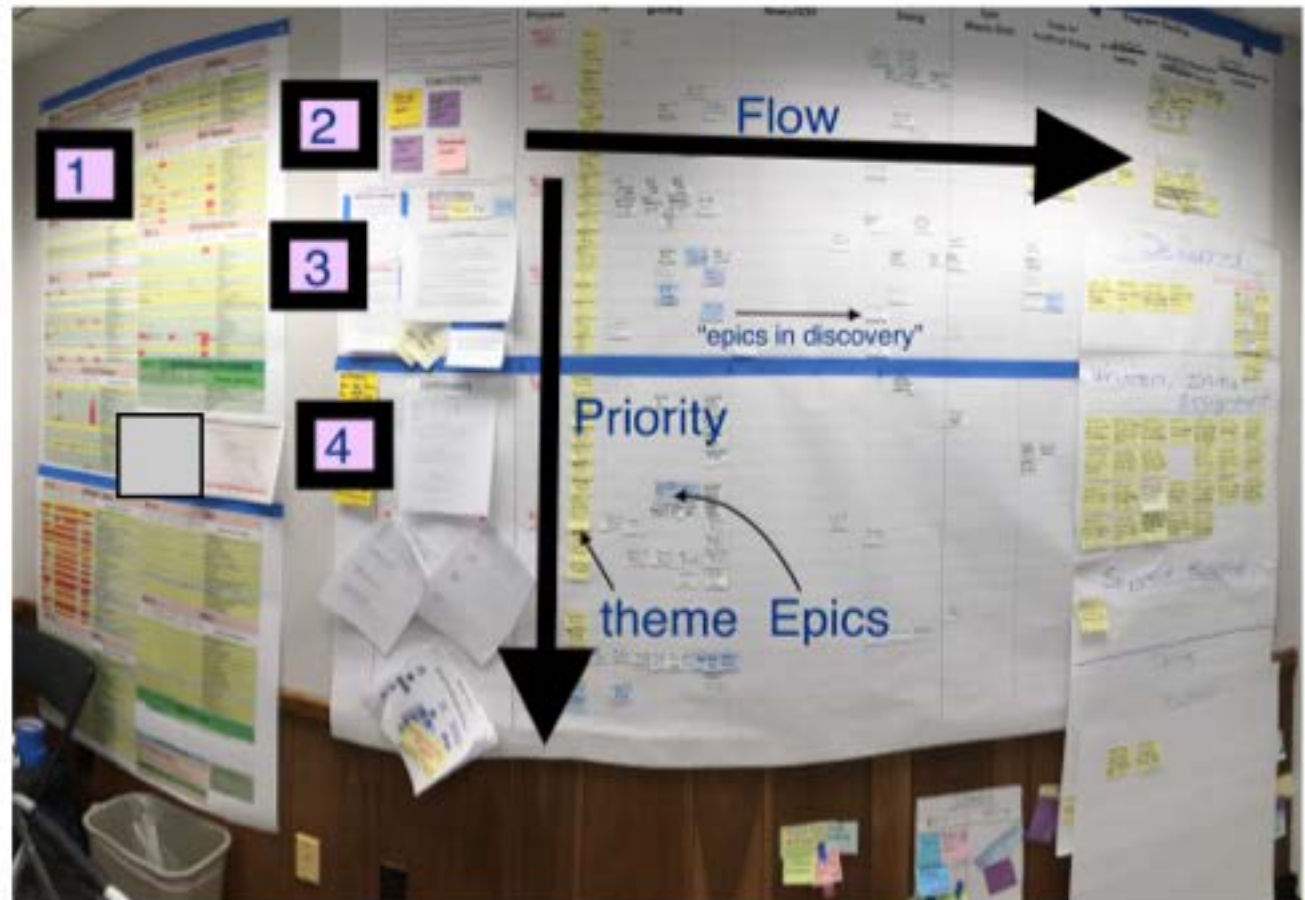
**Release Candidate Two (RC-2):**  
This includes all of RC - 1, plus enough additional functionality to confidently start marketing and soliciting new customers.

**Release Candidate Three (RC-3):**  
This includes all of RC-1 and RC-2, plus additional enhancements. Items in this category will be determined as the project matures. Examples would be:

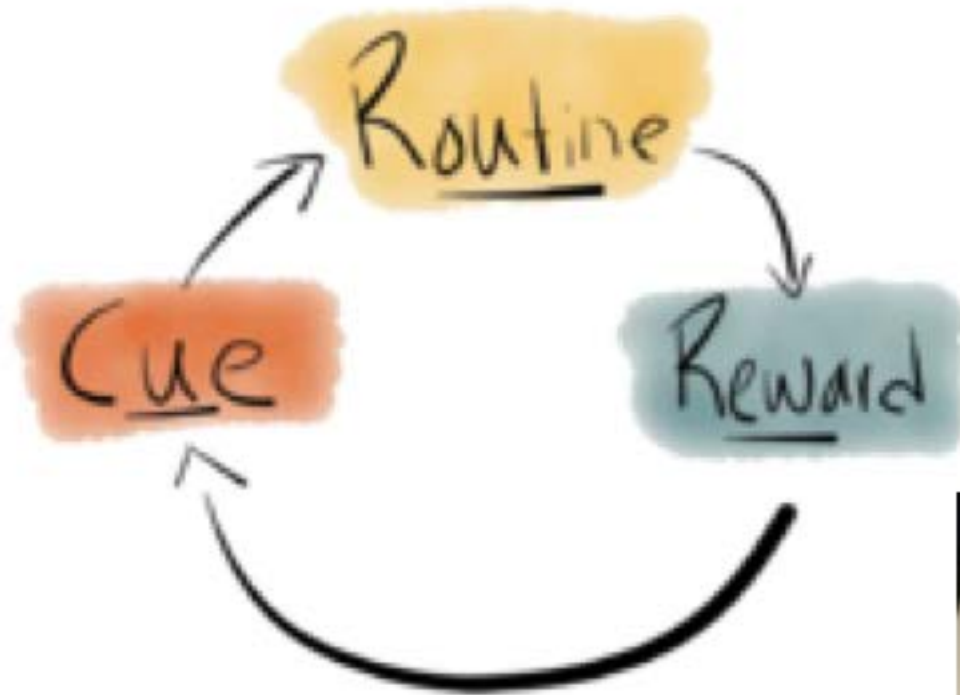
- Additional functionality
- Additional roles
- Additional lines of business

# Model Knowledge discovery process (STATIK)

1. Roadmap
2. Impediments
3. Explicit Policies
4. Measurements

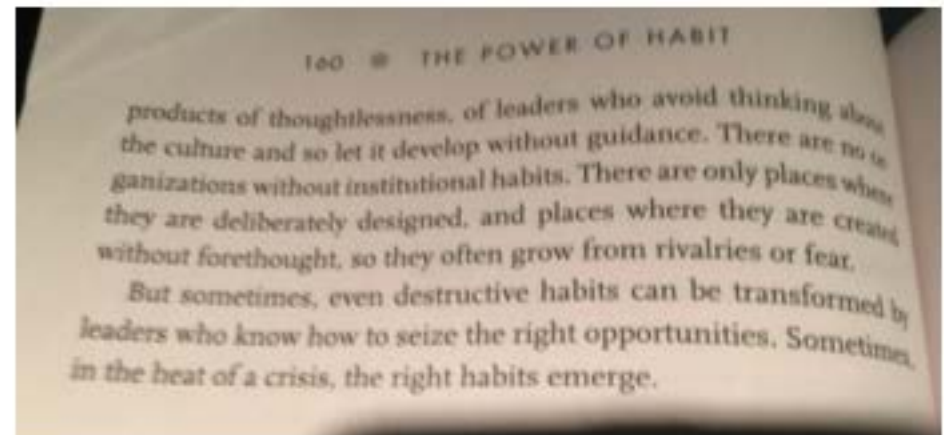


# Short Circuiting Habit Loop



- Identify Routine
- Experiment with Rewards
- Isolate the Cue

Source: The Power of Habit - Charles Duhigg





# Habit : Appreciations





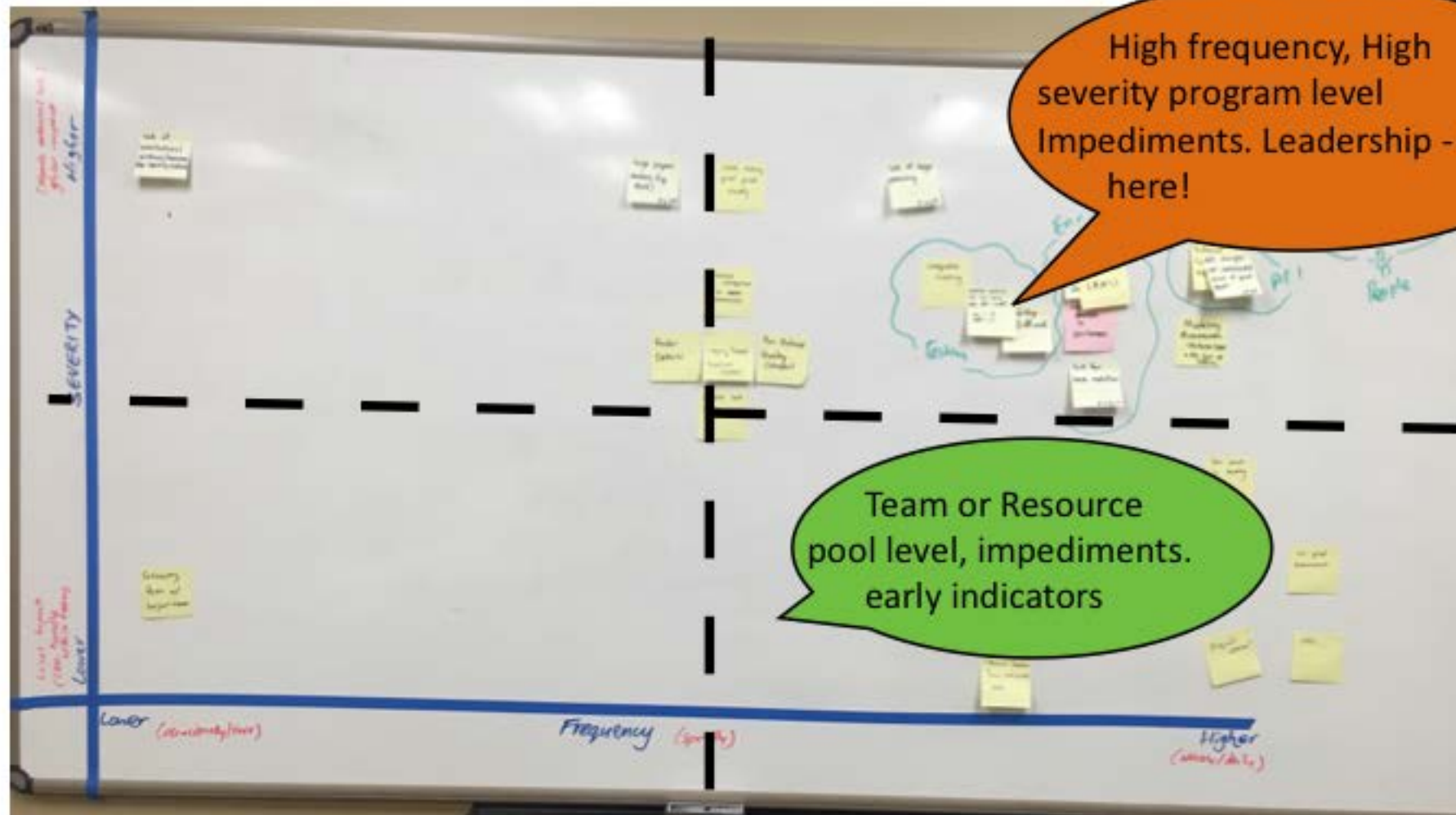
# Habit : Continuous Improvement



The "Results Pyramid" is copyright of Partners in Leadership LLC



# Identify and Prioritize Improvements (STATIK)

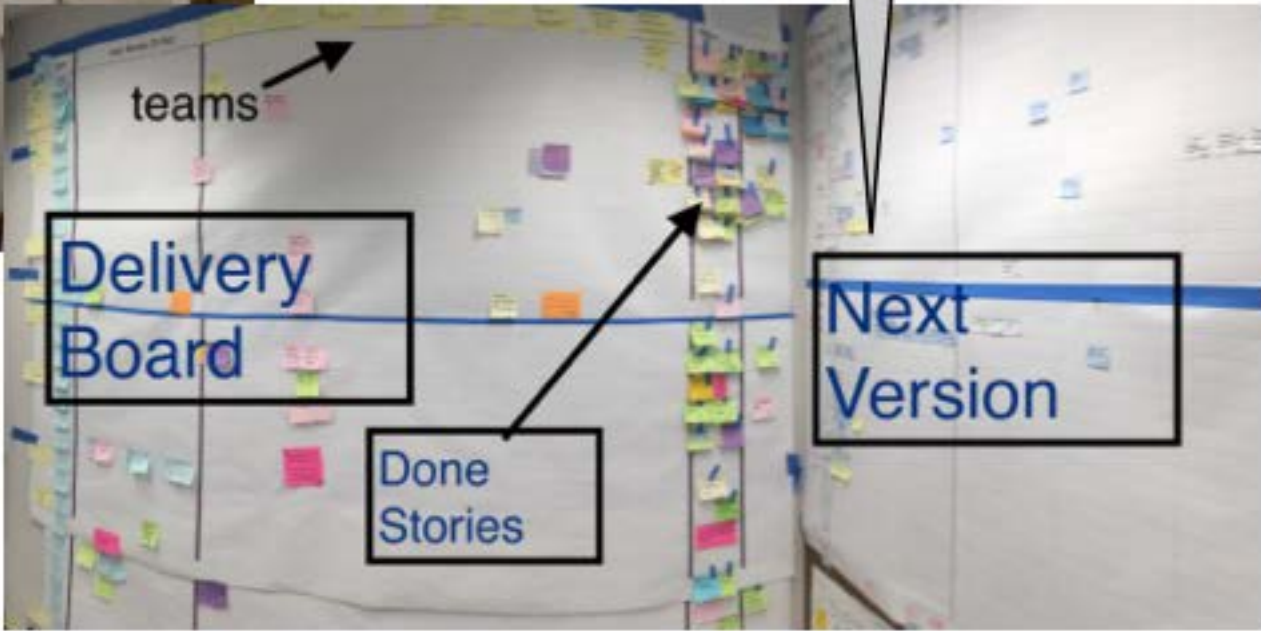


# Continuously Improve Visualizations



“experiment”  
Integration and  
Dependency Management.

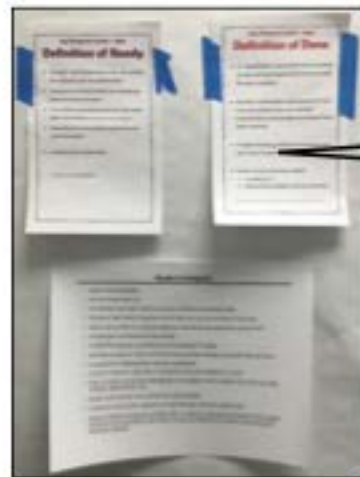
Staging Area for improved  
Visualization.





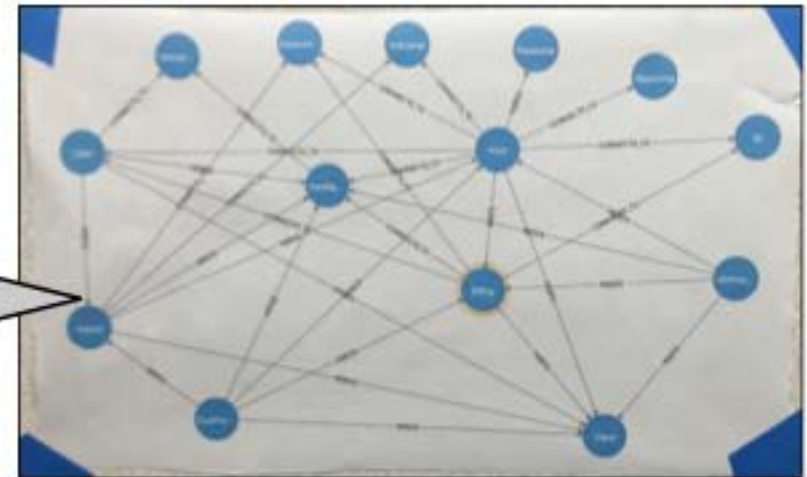
# Adherence to Explicit Policies

- Challenging to uniformly enforce Explicit Policies
  - Variety in technical practices maturity
  - New Application development, Legacy Code, COTS systems and Vendor managed implementations
  - Range of buy-in and interest in automated testing practices



Explicit policies

Visualize Systems/teams interaction domain map





# Bad News Fast

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- Test early, test often, test quickly
- Prioritize production-ready over new features/functionality
- Develop capability for ongoing product development and support as business enters new markets
- Round 1: RC-0 Functional Test Pass
  - Uncovered further gaps in understanding of the overall product
  - Exposed gold-plating of pet-features
  - Revealed gap in overall Program level testing strategy
  - Operational readiness requirements emerged
- Round 2: RC-1 Functional Test Pass
  - 🤔 🤔 🤔 🤔 🤔 🤔 🤔 🤔
  - Capability to do small increments of functional test passes, over big batch testing

### Program Level Meetings

Created by Troy Gaines, last modified by Dave Pingel yesterday at 10:03 AM

| Meeting                        | Time                            | Purpose   | Invitees  |
|--------------------------------|---------------------------------|---|---|
| Leadership                     | Monday 8:00 - 8:30              | To touch base on related items / topics affecting the overall <span style="background-color: black; color: black;">████</span> Insurance Initiative.  | Marc Deiter, Kevin Tidball, Troy Gaines, Dave Pingel (Program Leadership)   |
| Program Planning               | Monday 11:00 - 11:30            | To understand the vision, strategy and goals for better planning, management, development and demonstration of the <span style="background-color: black; color: black;">████</span> Insurance Initiative. | Business/Product Owners, Program Leadership   |
| Program Sprint Board Review    | Tuesday, Thursday 11:00 - 11:30 | To synchronize and coordinate with the purpose of executing on the Program Product Backlog of the <span style="background-color: black; color: black;">████</span> Insurance Initiative.                  | Business/Product Owners, Project Managers, Technical Owners   |
| Technical Review               | Biweekly                        | To review / discuss technical architecture items pertaining to the Say Insurance Initiative.  | Technical owners, Program Leadership  |
| PM Status                      | Biweekly                        | Review project tasks accomplished / commitments being met, any risks, issues and conflicts, any changes in commitments, schedules / timelines   | Project Managers, Program Leadership  |
| Operational Steering Committee | Monthly                         | To provide an update / status of the <span style="background-color: black; color: black;">████</span> Insurance Initiative with the Operational Steering Committee.                                       | Business Members, Program Leadership  |
| Executive Steering Committee   | Monthly                         | To provide an update / status of the <span style="background-color: black; color: black;">████</span> Insurance Initiative with the Executive Steering Committee.   | Executives, Program Leadership  |
| Program Pre-Planning           | Weekly                          | To look ahead and identify items that need clarification in preparation for the weekly (i.e. Monday) program planning session.  | David Bowen, Derek Helwig, Georgie Fanning, Barry Kettle, Charlie Aldrich, Matt Bronson, Marc Deiter, Kevin Tidball, Troy Gaines, Dave Pingel |

No "red, green, yellow" PM status meetings



- Monthly Program Level Demo
- **At First:** Started small, with each team demonstrating features they worked on. (Uncoordinated)
- **Then, Later:** Coordinated Demonstration with multiple teams demonstrating a coherent set of Epics.
- **And, NOW:** Monthly view for Executive management into product delivery

# Looking Ahead

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Domino affect, osmotic acceptance, collaborative team spaces



Change is hard

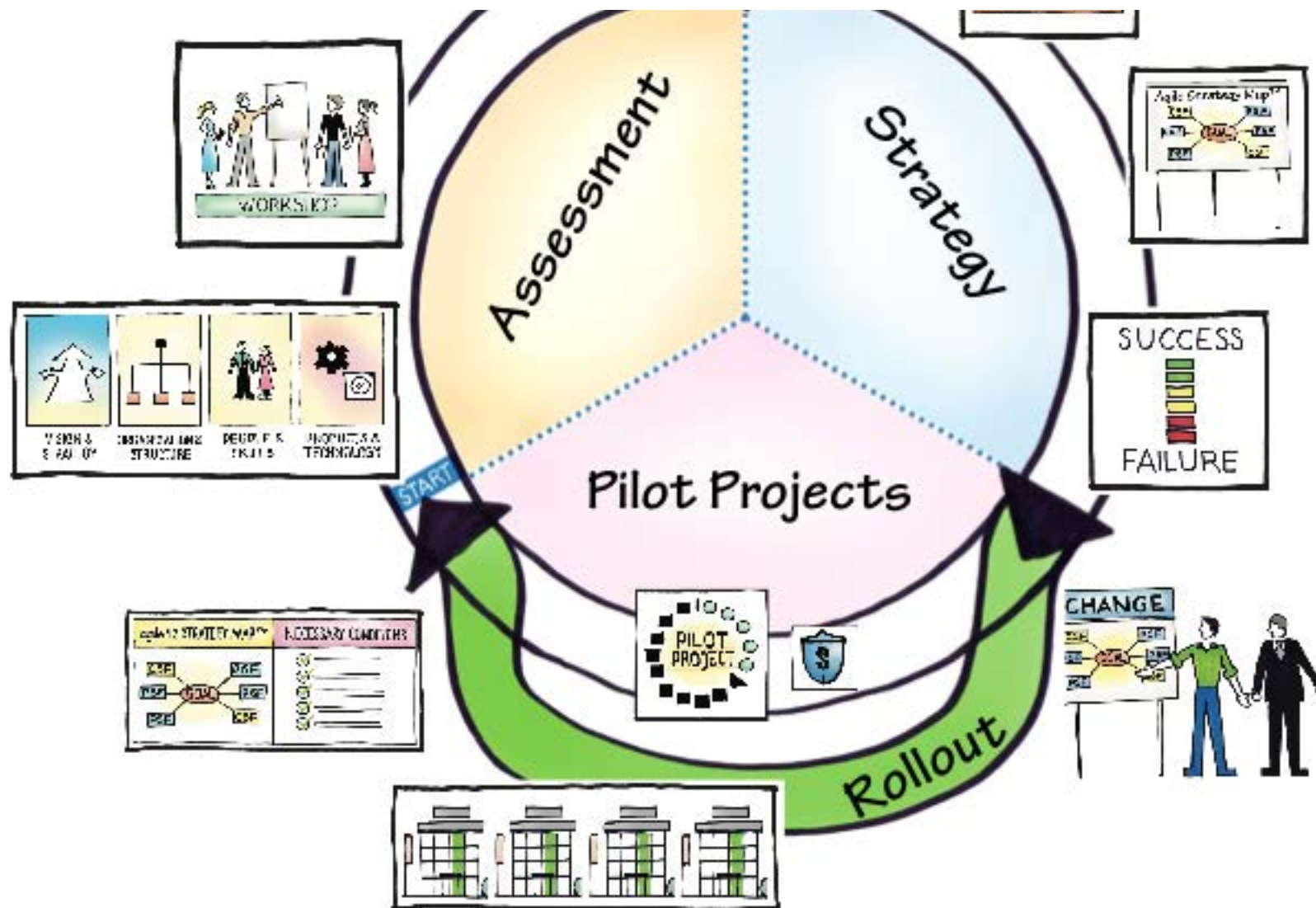


**Change is hard because people overestimate the value of what they have – and underestimate the value of what they may gain by giving that up.**

~ James Belasco and Ralph Stayer

## Enterprise Transition Framework (ETF)





# Resource Manager (Supervisor) Redefined

- Manage teams NOT Individuals
- Servant as a leader
- Growing competency of their people over assigning work

### What is a Manager of teams?

- A Servant-Leader that provides vision, clarity, and guidance to their team members on how to transition to a more *agile and adaptive* way of thinking.
- A Respected Manager that inspires and earns trust through shifting away from day-to-day workload management and focuses more on the development and growth of people.
- The *teams themselves* are accountable for delivery, while the Manager is accountable for *supporting and enabling the teams* to achieve the best possible performance.

It's a Start

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Sometimes slow,  
sometimes fast - got  
to keep on moving,  
only then you can  
steer



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## Collaborative Team Spaces





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