



Fannie Mae®

---

**Breaking through the Big Batch**  
**@**  
**FannieMae**

**May 9<sup>th</sup> 2017**





# Introductions

---



**Mick Ahmad PMP, CSM, CSPO, SA, SPC4**  
Product Manager, Enterprise Lifecycle tools

Mick, is an internal change agent in Fannie Mae evolving as a Product Manager for the Suite of Enterprise tools. He is a proven technology leader with business acumen in Multi Family, Single Family, Financial Services and Operations & Technology. Mick has 20+ years of experience providing leadership to cross-functional teams and managing large-budget projects.



**Vikas Kapila KMP, AKT, SPCT**  
Lean Agile Consultant , Coach, Trainer

Vikas is a transformation practitioner with a passion for applying Lean-Agile principles, behaviors and practices to enable delivery of highest business value with built-in quality at the earliest in a predictable and sustainable cycle. Vikas has 20+ years of experience in Solutions Delivery, Consulting, and Coaching.



# Project Context:

---

## Background

- Current lifecycle tool is 8 releases behind and no longer supported by vendor
- On-premise hardware is old, upgrades are difficult and there is no contingency environment
- Cost of maintenance is increasing as the tools usage increases
- Migration to Cloud technology of given project is costly with vendor support
- Flexibility of integration is more complex for DevOps tools



## **Project Context:**

---

### **Milestone**

- Teams must migrate from current tool set hosted internally
- 180 project teams (18-20 programs) need roll up across 5 major portfolio level for governance (planning and tracking)
- Release cycle's to be completed and roadmap required for migration

Projected value a saving of \$3.5M over the next 5 years



# Scrum : Agile : Scrum

---

- Reduced time box iterating mini waterfall
- Management on-board with Agile terminology but not its behavior
- Teams struggle with identity in Agile space
- Scrum is introduced:
  - Training is provided to Project Manager
  - Fixed iteration – 2 week agreed
- Outcome after 6 months (12 sprints)
  - Stale delivery; Busy work “churn”



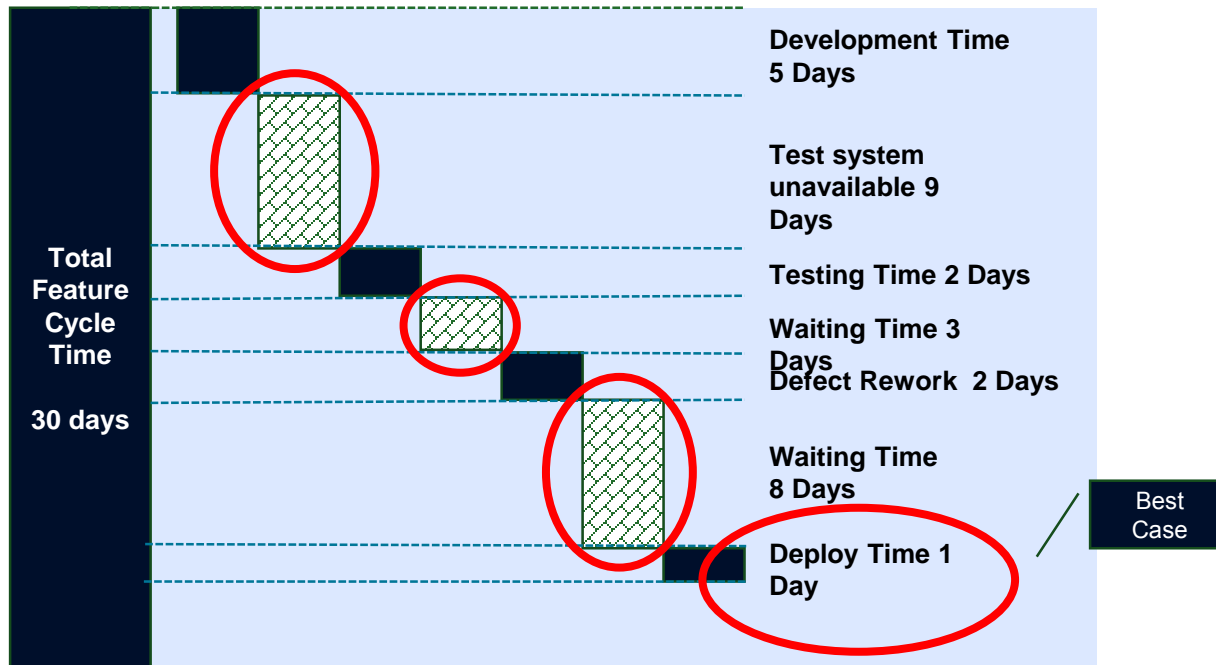
# Leadership Actions

---

- State of Urgency recognized
  - No accepted / shippable product
  - 4-12 member team working for 6 months ~ ½ Million Dollars down
  - Leadership required refocus on the project to meet tangible outcomes
- Leadership direction
  - Experienced Product Manager introduced
  - Dedicated Product Manager and Product Owner
  - Separated the project group into product team with Engineering and Validation/Verification focus.



# Observation #1: Anatomy of avg “Work Item” showed 67% was wait time





# Observation #2: Waste – Delays in the System

7 Wastes of Lean		7 Wastes of Software Development
Inventory	Raw Material, work-in-progress, or finished goods which is not having value added to it	
Over Processing	Processing beyond the standard required by the customer	
Overproduction	To produce sooner, faster or in greater quantities than customer demanded	
Transportation	Unnecessary movement of people or parts between processes	
Waiting	People or parts that wait for work cycle to be completed	
Motion	Unnecessary movement of people, parts, or machines within a process	
Rework	Not right the first time. Repetition or correction of a process	





# What did the Product Team perform:

- Create / Update the Vision
- Create / Update the Roadmap with Epics, Capabilities & Features
- Create / Update the monthly Release Plan with Features and stories
- Create Stories to create Release plan aligned to Business needs
- Engineering team created the custom configurations in line with Enterprise needs
- Verification / Validation team confirmed behavior of the solution internally and Alpha/Beta users

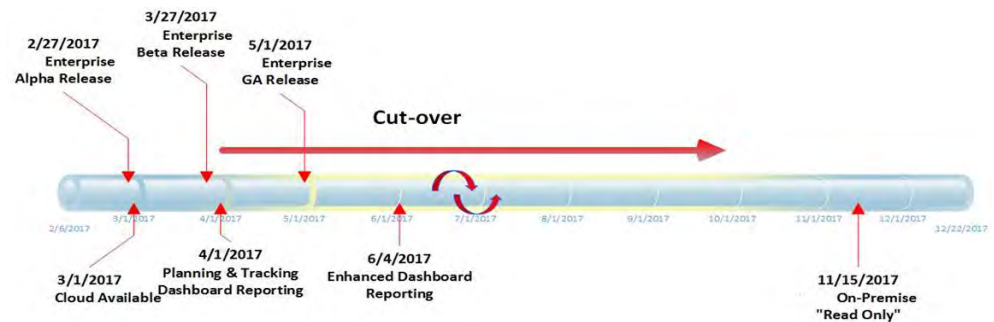


## Option 1 – Cloud Tool

- Designate Portfolio Lead(s)
  - Workspace Admin(s)
  - Create Workspace, Provision Users, Create Projects and Assign Users
- Refactor Custom Reports (if applicable)
- Migrate Data: Vendor support required. (6 month backlog; \$20-50k per project)
- Go!

## Option 2 – On-prem

- Designate Portfolio Lead
- Engage with Agile Coach
- Plan Onboarding with Dev Services
- Get Trained!
- Get involved! – Join the Guild and build the Tribe!





## How the product team accomplish the “What”

Product Manager introduced the Kanban method to the team; specifically

- Kanban principles
- Kanban cadences
- Prioritization and sequencing applying cost of delay



# The Kanban Method

---

## Change Management Principles

- Start with what you do now
  - Understanding current processes, as actually practiced
  - Respecting existing roles, responsibilities & job titles
- Gain agreement to pursue improvement through evolutionary change
- Encourage acts of leadership at all levels



# The Kanban Method

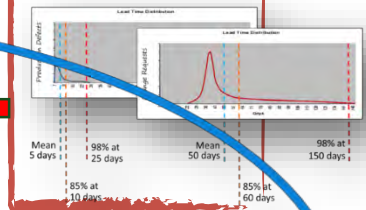
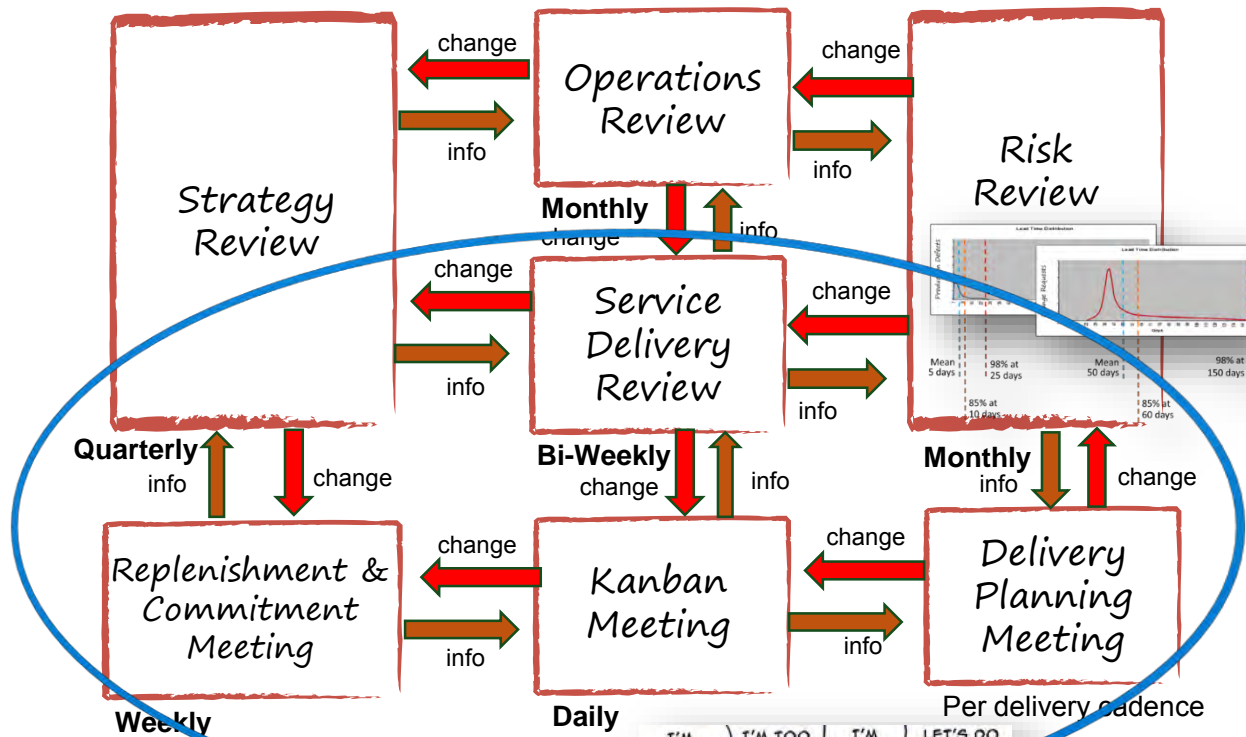
---

## General Practices

- Visualize (with a kanban board 看板)
- Limit work-in-progress (with kanban かんばん)
- Manage flow (with focus on right work, right time, right way)
- Make policies explicit (Stop Starting, Start Stopping)
- Implement feedback loops
- Improve collaboratively, evolve experimentally



# Kanban Cadences to Implement Feedback loop from within the team





# Weekly Guild & Tribe meetings to Implement Feedback loop from users

- Weekly Guild meeting cadence across the Enterprise
- Weekly Tribe meeting cadence focused on respective Portfolio

The screenshot shows a Confluence page titled "Meeting notes" created by Taylor, William on Mar 20, 2017. The page content includes a "Task report" box with the text "Looking good, no incomplete tasks." and a "Create meeting note" button. Below the report is a table titled "All meeting notes" with columns for Title, Creator, and Modified.

Title	Creator	Modified
JIRA Guild - 4/13/2017	Taylor, William	Apr 14, 2017
2017-04-11 - JIRA Guild Meeting - 3:00-4:00PM	Taylor, William	Apr 11, 2017
2017-04-06 Meeting notes - JIRA Guild Meeting #6	Taylor, William	Apr 07, 2017
2017-03-20 JIRA Guild - "ALPHA Release"	Taylor, William	Mar 20, 2017

The screenshot shows a Confluence page titled "JIRA Guild - 4/13/2017" created by Taylor, William on Apr 13, 2017. The page contains an agenda for the meeting, including announcements, backlog items, and a list of attendees.

**Agenda**

- Announcements - Production down at 6:00PM - system maintenance
- Backlog items from last session
  - Acceptance Criteria review
  - PO field at Story
  - PI at Feature - field update deferred
  - Confluence workflow documentation updated
  - Bulk Edit by Project Lead or Project Admin to be enabled
  - Workflow for Feature type - workflow update deferred
- Demos
  - Acceptance Criteria is configurable by board. Will demo during Guild.
  - Field updates: Product Owner (Story) and
  - Product Increment (Feature) (PI) feedback - make drop down - field update deferred
  - Playbook Update: "CSV Import Instructions" and video
  - Feature Workflow - workflow update deferred
- Open Floor
  - Would like JIRA Kanban cards to look more like Post-It. Is there an Add-On? This can be configured within the board. One/One session conducted.

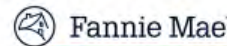
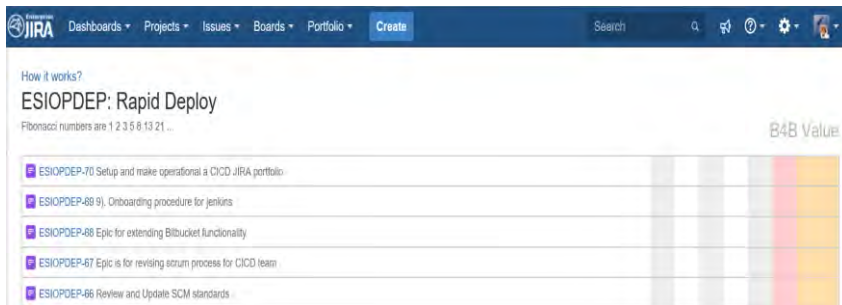
**Attendees**

Invited	Invited	Attendees
JIRA Enterprise Team	Adams, William S - wadams_1@atlassian.com	
Ahmed, Madi - madi_ahmed@atlassian.com	Adrian, Patricia A - padrian_a@atlassian.com	
Bernold, Matthew - mbernold@atlassian.com	Babin, Stephen (Contractor)	
Dassan, Yemiel (Contractor) - yemiel_dassan@atlassian.com	Dehghani, Soroush@atlassian.com	
Kaplan, Vitor (Contractor) - vitor_kaplan@atlassian.com	Evans, Robert - robert_evans@atlassian.com	
Lewis, John P - john_p_lewis@atlassian.com	Shankar, Deepak - deepak_shankar@atlassian.com	
Melzer, Jason - jason_melzer@atlassian.com	Smith, Mark F - mark_f_smith@atlassian.com	
Pruss, Michael - michael_pruss@atlassian.com	Domokai, Marcella (Contractor)	
Rowen, Francesco (Contractor)	evans_robert@atlassian.com	
	Dwight, Trigg - trigg_dwight@atlassian.com	



# Prioritization & Sequencing of Capabilities based on Cost of Delay (CoD)

- Planning
- Tracking
- Dashboard
- Integration with Engineering Tools
- Integration with SDLC (IRM | EPMO)



	Alpha - March 2017	Beta - April 2017	Go - May 2017 onward
<b>Product Lifecycle Workflows</b> (i.e. SAFe 4.0, Scrum, Kanban)	1. Scrum Board 2. Kanban Board with a. WIP limits per column b. Expedite Lanes c. Custom Swim Lanes 3. Definition of Done template 4. Definition of Ready template 5. Dependency Linkage Management 6. 4 Level SAFe Support	1. Program Kanban Board 2. Value Stream Kanban Board 3. Portfolio Kanban Board	Stretch 1. Scrumban   CDM/EP
<b>Planning &amp; Tracking Dashboards</b> (equivalent to Rally On-Prem)	1. Team: Program: Portfolio Boards 2. Portfolio Plan as Roadmap Planning 3. Team: Program: Portfolio Backlogs 4. Team: Program: Portfolio Reporting with Burn-down 5. OFO charts: Sprint & Release Burndown 6. Burndown prioritization of Features, Capability and Epics 7. Theme - Initiator - Epic - Capability - Feature - Story, Defect, Task, Test Case - Sub Task Work Item Hierarchy	1. Program Board 2. Risk ROAM Board 3. Control Charts 4. Team level Capacity Planning 5. Program Level Capacity Planning 6. Team Dashboard 7. Program Dashboard 8. Portfolio Dashboard	1. Predictability 2. Productivity   Efficiency
<b>On-Boarding/Training</b>	1. JIRA Enterprise Playbook on Confluence 2. Project Admin Overview 3. Project Lead Overview 4. Team Member Overview 5. Hand Holding with JIRA Enterprise structure setup 6. Jira Standalone to JIRA Enterprise transition validated	1. JIRA Enterprise Playbook on Confluence, Enhanced 2. Train the Trainer Draft for JIRA Enterprise structure set-up 3. Guide   User Group active & engaged 4. Jira Standalone to JIRA Enterprise transition validated	1. JIRA Enterprise Playbook on Confluence, Enhanced 2. Train the Trainer Draft for JIRA Enterprise structure set-up 3. Guide   User Group active & engaged 4. Jira Standalone to JIRA Enterprise transition validated
<b>Integrations: Collaboration, Source Control, CI/CD, Code Review &amp; Quality and Tooling</b>	1. Confluence 2. Team Calendar 3. Yammer	1. Service Desk 2. Questions 3. Yammer	1. Version
<b>Enhanced Dashboards</b>	1. Review Hexaware product	1. Create the pull of Data into Data Mart	1. Prototype Dashboard
<b>SDLC Governance/Traceability</b>		1. RM R&D	1. Prototype RM - Registration and DTM

Confidential - Internal Deployment 3



---

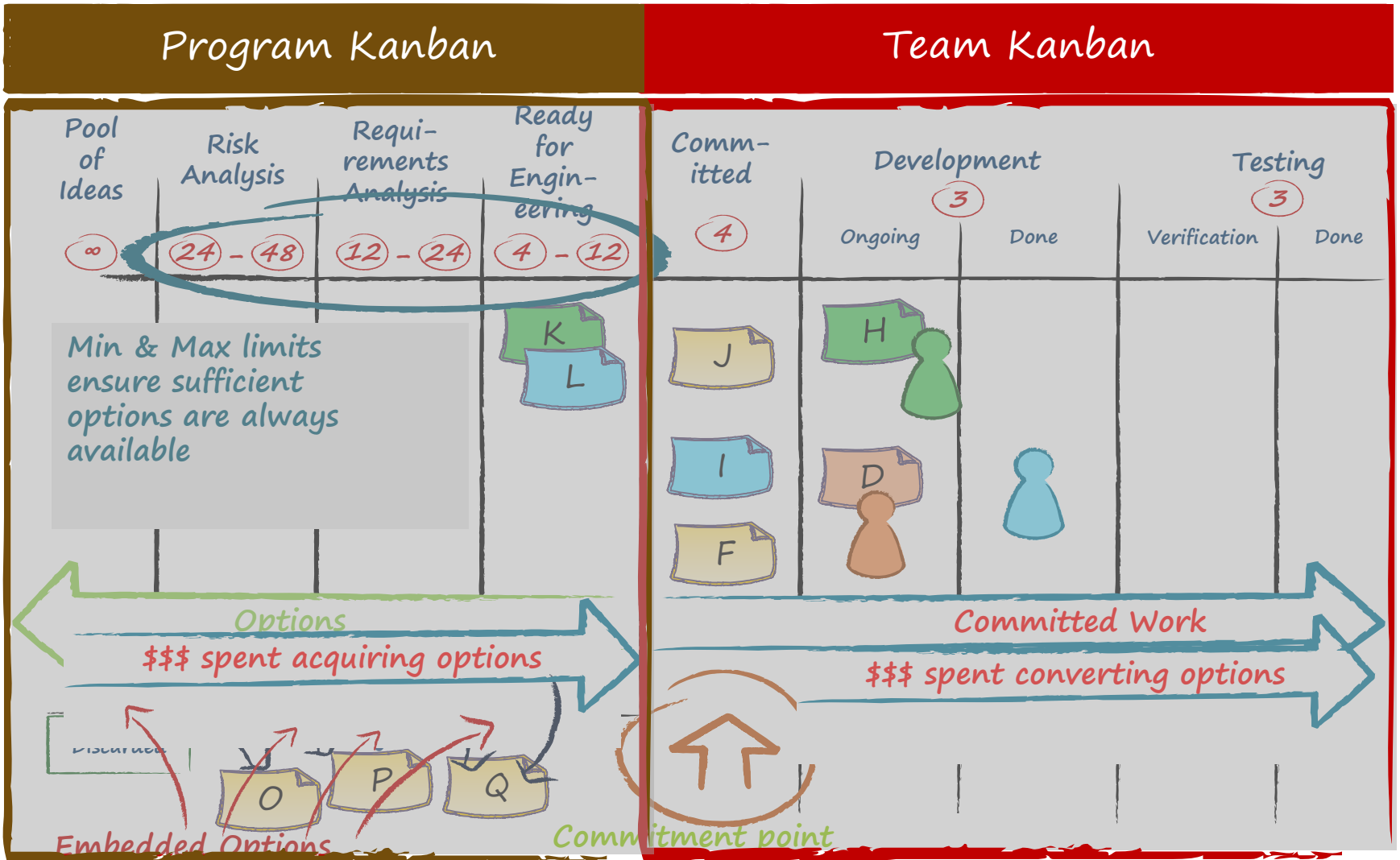
# Summary of Change Implemented through Team Agreement

- Visualize & Manage work flow by highlighting the business value & Managing WIP
- Collaborate as the product team on pulling highest value work item from the Kanban board based on present and evolving skill set based on WIP across the board
- 3 Events in Cadence
  - Daily Stand-up
  - Replenishment session to get ready and coordinate work ready for delivery
  - Service Delivery Review
- 2 Roles – Kanban Lead & team Members
- Program Kanban for getting ready the work to deliver
- Team Kanban for getting work done to deliver value



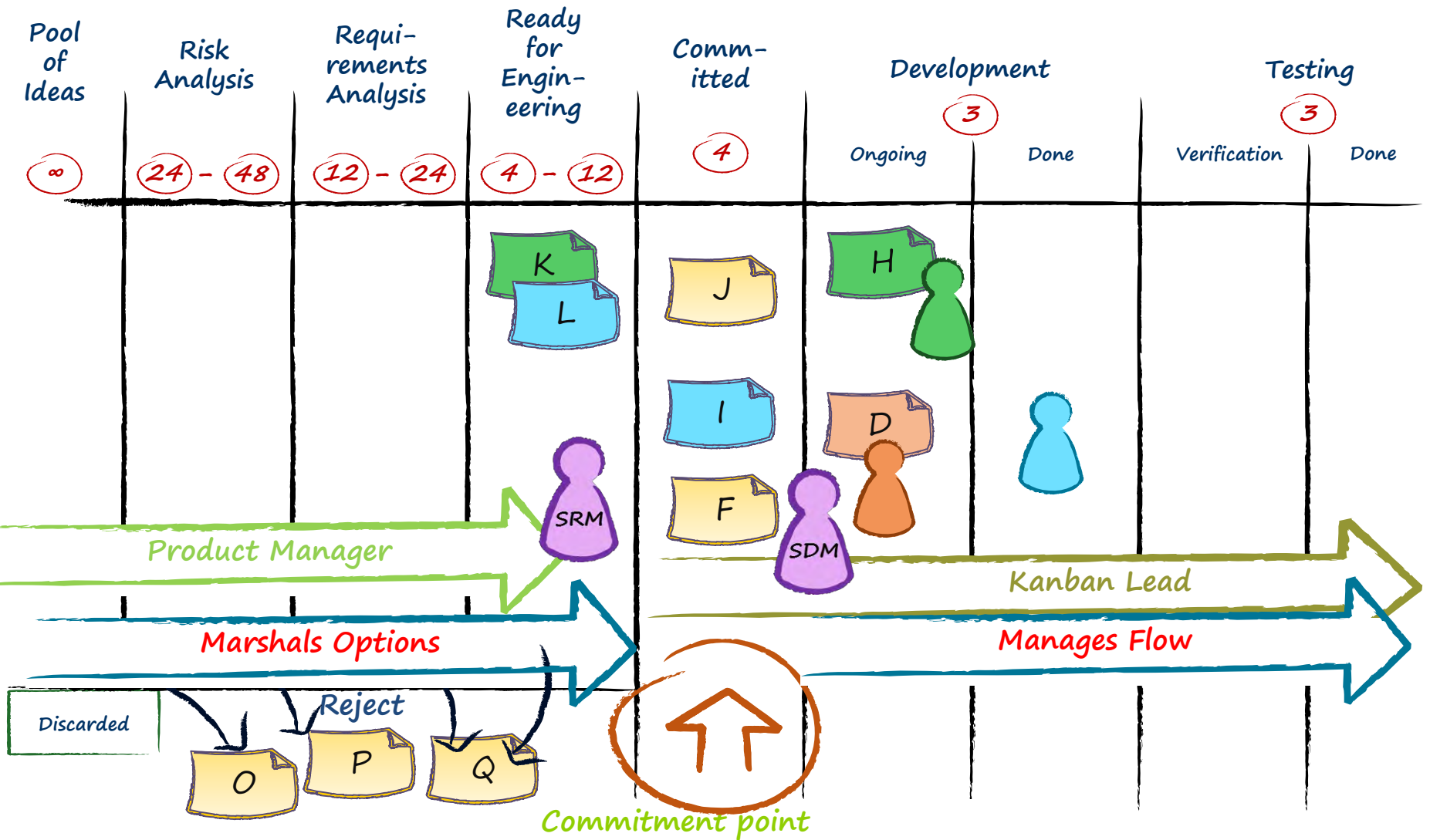


# Program Kanban Prepares Options Team Kanban delivers value





# Roles





## Outcomes of the Change

---

- 7 member team in 8 weeks ~1/4 Million \$\$
- Increased visibility of progress towards work completion
- Predictable cadence based activities with pragmatic guidance on outcomes
  - ✓ Increased value delivery within SLA
  - ✓ Improved customer and business appreciation
- Improved Decision Making (Prioritization | Sequencing) enabled isolating the “Steel Thread” as basis for incremental delivery
- Incremental Roadmap Delivery achieved with customer delight



---

# Questions

Thank You