



Scaling in the Real World

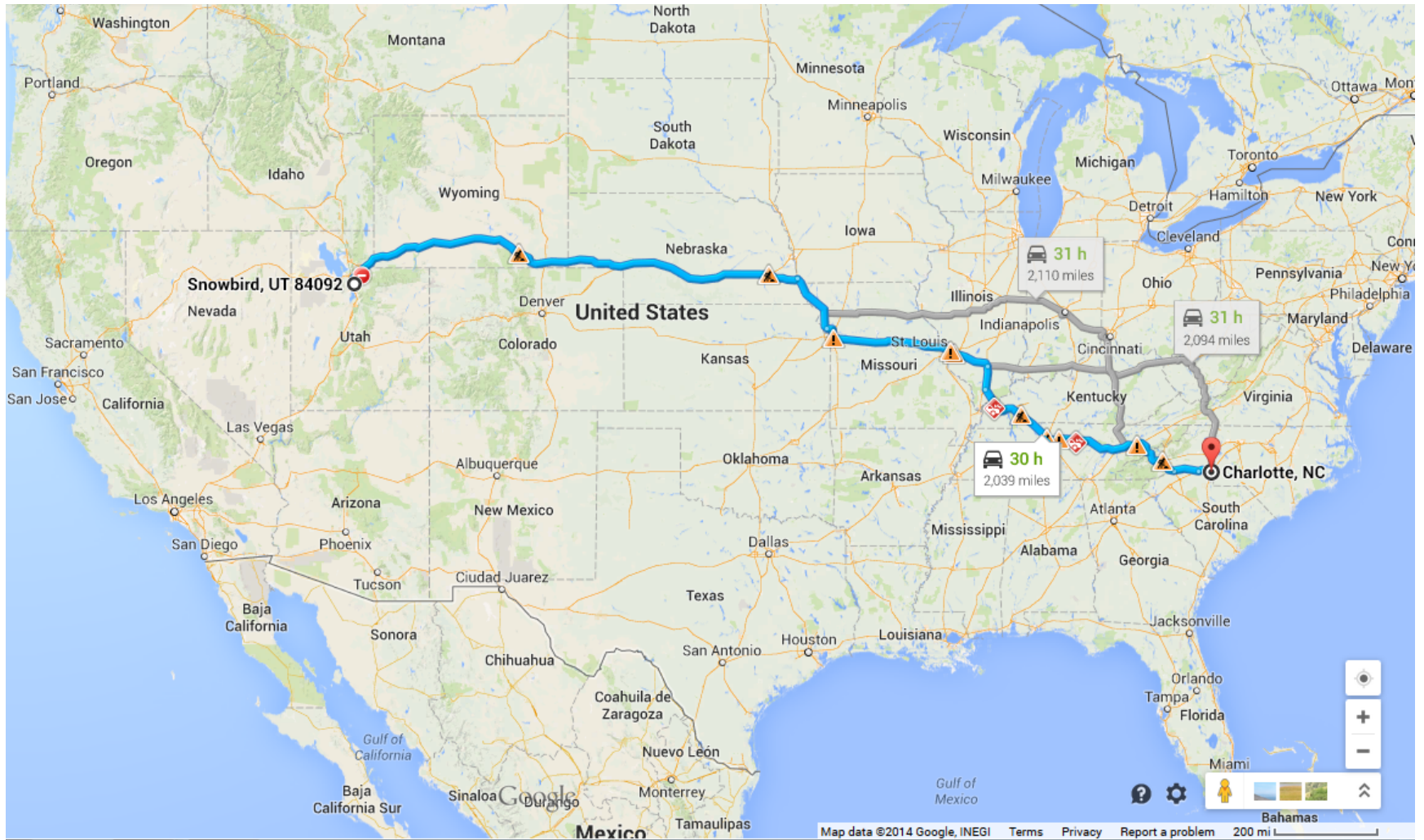
Wells Fargo Retirement Technology

October 23rd, 2014

Together we'll go far



We're Not In Snowbird Anymore!



About Us

Todd Biedrzycki

- Director of Retail Retirement Technology
- Responsible for delivering business solutions that span distributed computing platforms, data warehousing and mainframe applications
- Early adopter of Agile with Wells Fargo (7 years and counting!)

Linda Butt

- Project Management Office Lead for Retirement Technology
- Responsible for PMO, Agile and Balanced IT Scorecard
- Relative newbie to Agile (just hit the two year mark)

About Us

Retirement Technology

- Deliver 401k solutions to Fortune 500 companies (including ourselves!) and Retail Retirement products (e.g. IRAs) to Wells Fargo customers
- Teams consists of ~400 team members (FTEs, Contractors and Off-Shore and Outsourced Resources)
- Distributed teams in Charlotte, Roseville, MN, Rockville, MD, Sioux Falls, SD and India
- Embraced Agile in late 2007; early adopter and “tribal elder” within Wells Fargo
- Subject to numerous (and increasing) regulatory requirements, enterprise standards, and internal and external audits

About Us

Applying the Agile Manifesto to Our World

Individuals and interactions over processes and tools

TPM
(methodology)

PMUWS
(tool)

Quality Center
(tool)

Pac2000
(tool)

Working software over comprehensive documentation

PDD, BRD, RA, FSD, ITS
(deliverables)

Test Strategy, Plan and Scripts
(deliverables)

Budget Forecasts and Staffing Plans
(deliverables)

Customer collaboration over contract negotiation

Project Funding
(process)

Vendor Management / Supply Chain Management
(process)

Business Signoffs
(process)

Responding to change over following a plan

Enterprise Release Management
(schedule)

Partnering with Waterfall Teams
(organizational complexity)

3rd Party Dependencies & Deviations
(domain complexity)

About Us

■ Our Introduction to Scaling

- Engaged Agile coaches in summer 2013 to assess current agile practices and provide real-time coaching
- Anomalies (deviations from core agile practices) identified
 - Many self inflicted; many due to organizational influences
 - Some were purposeful deviations (a good thing!)
- Forced a **re-commitment** to core agile and Scrum practices
- **Reenergized** our passion for agile delivery with a focus on scaling to reduce anomalies
- Led to an investment to up our agile “game” using gamification concepts to re-enforce agile knowledge and behaviors

Scaling – Definitions

Scaling (skāy-ling) *vt.*

1. to go up in a graduated series

2. *Dentistry*

– to remove tartar from teeth with a sharp instrument

3. *Software Development*

– applying agile principles at the enterprise level

– staying true to core agile principles and extending them beyond the software development stage to the entire lifecycle

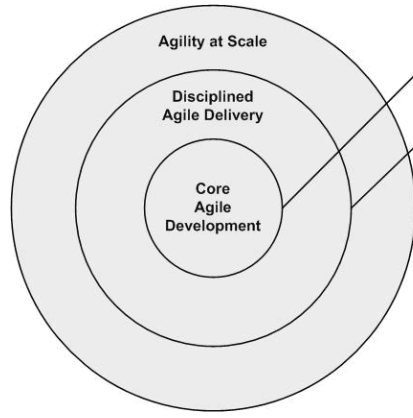
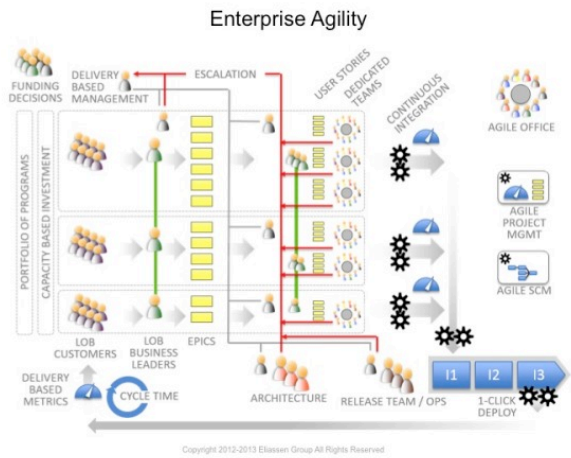
– adapting your agile delivery process to deal with the many business, organization and technical complexities your organization faces

Scaling – Frameworks

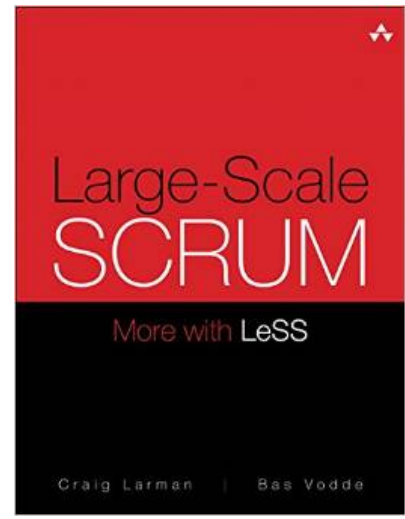
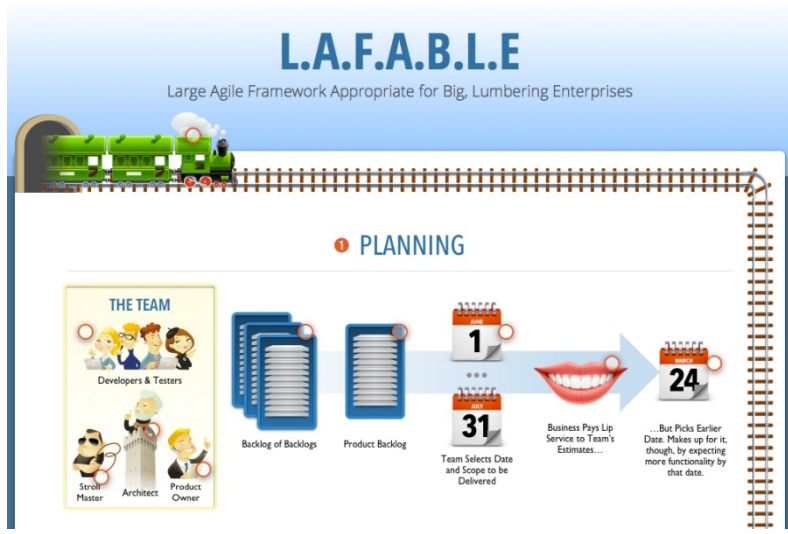


Scaled Agile[®] Framework

A PROVEN, PUBLICLY AVAILABLE FRAMEWORK
for applying Lean|Agile practices at enterprise scale



- Core Agile Development**
 - * Value driven life cycle
 - * Self organizing teams
 - * Focus on construction
- Disciplined Agile Delivery**
 - * Risk+value driven life cycle
 - * Self organizing within appropriate governance framework
 - * Full delivery life cycle
- Agility at Scale**
 - * Disciplined agile delivery when one or more scaling factors apply:
 - Large team size
 - Geographic distribution
 - Regulatory compliance
 - Domain complexity
 - Organization distribution
 - Technical complexity
 - Organizational complexity
 - Enterprise discipline



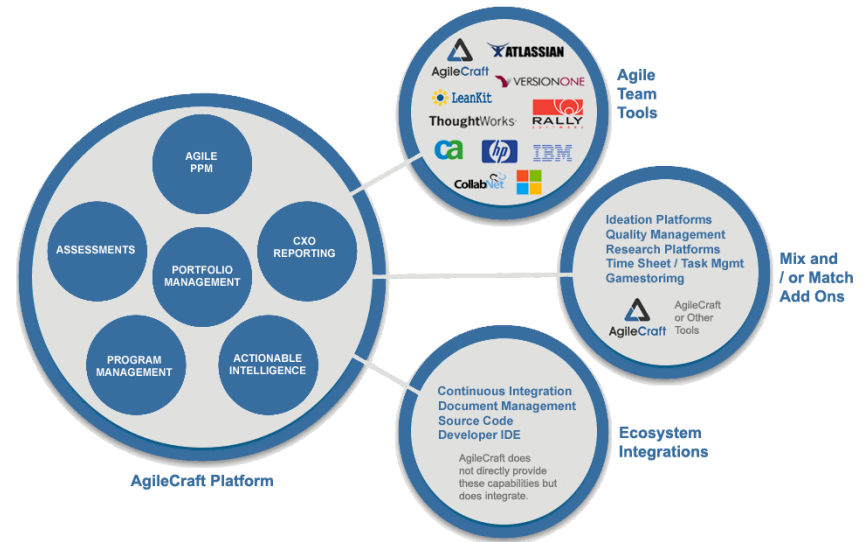
Scaling – Tools

Implementing Scaled Agile Framework® SAFe™ with VersionOne

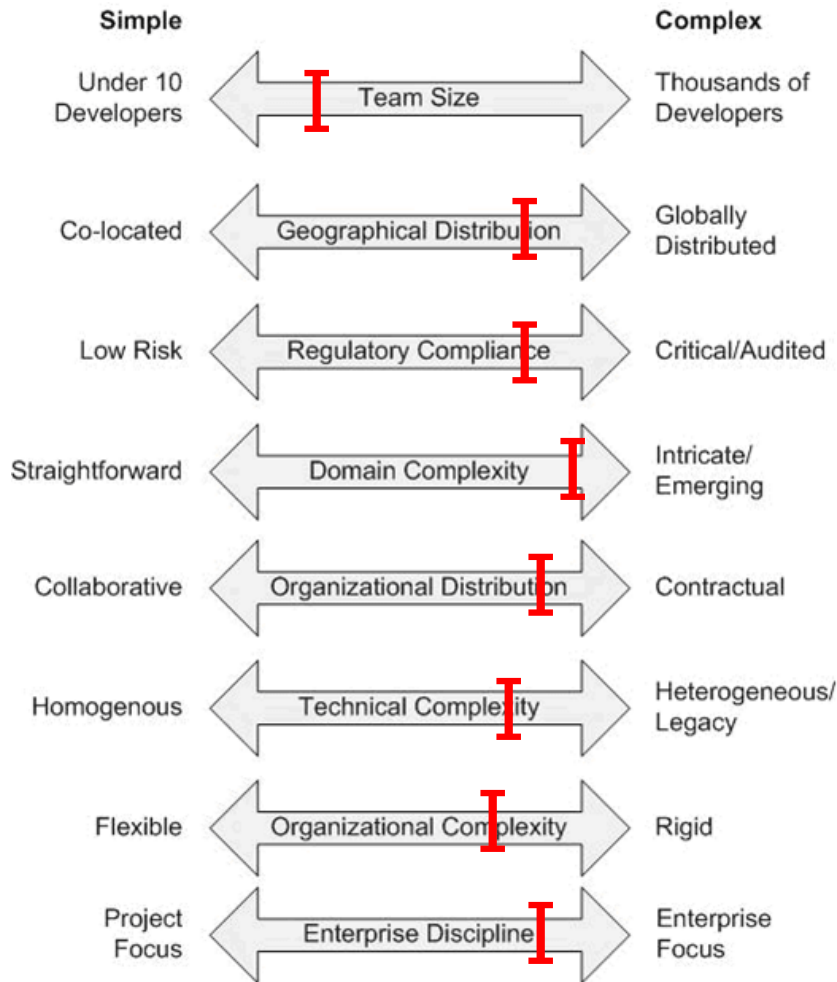


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Scaling – Our Assessment



- Scrum teams with over 20 team members, many belonging to more than one Scrum team
- Scrum team members are employees, contractors, off-shore/outsourced and vendor resources located in 4 main US locations, India and other one-off locations
- Applications subject to numerous regulatory audits and project management methodology subject to OCC audit
- Applications are heavily integrated with internal development organizations and external 3rd party solutions
- Many projects require integration with internal development organizations that do not follow Agile and have different delivery timelines and processes
- Solutions span mobile applications to mainframe systems with many layers of infrastructure between
- Many partner organizations still follow waterfall!
- Subject to compliance with enterprise project management methodology and supporting tools for testing, change management, etc.

Source: The Agile Scaling Model (ASM): Adapting Agile Methods for Complex Environments
Author: Scott W. Ambler, Chief Methodologist for Agile and Lean, IBM Rational

Scaling in Retirement Technology

- Managing large, diverse Scrum teams
 - Large teams that are globally distributed
 - Mix of employee, contractor and vendor resources
 - Non Agile partners within the enterprise
- Complying with non-Agile friendly practices
 - Enterprise project management methodology with many required deliverables and approvals
 - Rigid processes for engaging supporting services
 - Subject to internal and external audits
- Operating in Complex Technical Environments
 - Tight integration with internal shared services, enterprise solutions and 3rd party applications
 - Combination of new technology (e.g. mobile) and legacy applications (mainframe)
 - High level of availability (service level agreements)

Scaling in Retirement Technology

Challenge:

- We have really large Scrum teams that are located across several domestic and international locations

Solution:

- Curated the perfect “whole team” consisting of core and extended team members
- Leveraged technology to communicate and facilitate collaboration (screen sharing, common tools)

Tips, Techniques & Lessons Learned:

- Find a common/compatible time for daily stand-up
- Involve vendor in collaboration session / daily stand-ups
- Be clear on roles and responsibilities (and expected effort)
- Involve Architecture, QA and Prod Support in Sprint Planning
- Don't use your daily stand up to resolve impediments

Scaling in Retirement Technology

Challenge:

- We are required to demonstrate compliance with the enterprise project management methodology, use standard tools and adhere to strict implementation timeframes

Solution:

- Mapped Agile artifacts to TPM Deliverables (Release Plan = BRD, etc.)
- Aligned sprint cycles to enterprise release calendar when integrating with large systems, otherwise go with off-cycle deployments

Tips, Techniques & Lessons Learned:

- Plan at the release, sprint and daily levels. Understand, accept and communicate risk of going off cycle
- Set expectations up front when partnering with non-Agile teams
- Track story points and velocity separate from project budget and forecasting to enable Scrum teams to maintain their focus

Scaling in Retirement Technology

Challenge:

- Our systems comprise of multiple environments that integrate various technologies which are supported by internal teams, shared services and 3rd party vendors

Solution:

- Organized several infrastructure services as Scrum teams who partner with traditional development Scrum teams (engage in planning and align dependencies)
- Bundled infrastructure changes with production deployments to maximize testing efforts and minimize downtime

Tips, Techniques & Lessons Learned:

- Engage early and often! Communicate and collaborate especially where there are long lead times and dependencies
- Use agile practices to influence waterfall team behaviors to see incremental progress

Scaling in Retirement Technology

■ Observations

- Understanding complexity factors put our Agile journey / progress into perspective
- Constantly check adherence to guiding principles and practices and self correct when needed
- Collaboration is a powerful tool!
- Continuous improvement must be business as usual not an afterthought
- Focus on processes and behaviors (not tools or technology)

Scaling in Retirement Technology

- What's Next? We are ...
 - Continuing to leverage insights, best practices and deliverables from coaching engagement
 - Communicating our Agile journey and accomplishments along the way
 - Continuing to onboard new Agile teams (especially in non-development functions) and leverage lessons learned from previous team start ups
 - Building an agile game focused on reiterating core agile concepts and best practices and providing users a way to demonstrate knowledge and hands-on experience

Questions
