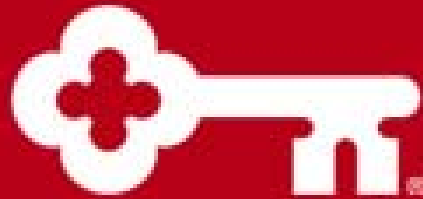


Enabling Agile in a Large Organization

Our Journey Down the Yellow Brick Road



Agile2007

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KeyCorp

Software Development Support Center

Helping Enterprise Technology Development build better software, faster

Topics

- **Who is KeyCorp?**
- **What is our story?**
- **Lessons learned along the journey?**

Who is KeyCorp?

- KeyCorp – Financial Services Company
 - 1,000+ branches
 - \$95B assets
 - 20,000 associates across 14 states and Europe
 - Highly regulated
- Key Technology Services
 - 1,500 associates across 2 major domestic development centers and 2 offshore centers
- Enterprise Technology Development
 - 1,000 developers
- Wide Technology Base

Where does our story begin? It was just 2 years ago...



- Business Relationship
 - Business partners would go to extremes to avoid working with us
 - They told us: In Development following a process is more important than helping the business meet its goals
 - At the end of each year, they had rarely spent the development dollars that were allocated
 - Did not actively participate in projects
- Within Development
 - Command-and-control management
 - Metrics measured the quality of other metrics
 - Failures were punished while successes were ignored
 - Strong centralized PMO
 - Compliance-oriented environment
 - Highly matrixed (each individual working on 4-5 projects at one time)
 - Specialized skills and roles
 - Buy vs. build mindset
 - Methodologies were mandated and rolled out

Enabling Agile at KeyCorp



- Our 7ish step program to recovery
 - Set the vision for a new culture
 - Empower the organization
 - Enable a relentless passion for removing impediments
 - Establish an agile project management framework
 - Add developer practices
 - Connect product owners from the start
 - Never stop looking for opportunities

Set the vision for a new culture



- It was never about Scrum or Agile
- It is all about delivering business value and being a great software development organization
 - CIO
 - Projects return more value with incremental delivery and engaged trusting business partners
 - Director of Development
 - Our people are justifiably proud of, and recognized for, their contributions to the business

Empower the organization



- PMO Disbands
 - Project managers placed back into the Development Teams
 - Required artifacts went away
 - Mandated methodologies went away
 - Compliance to process went away
- Process and support functions lost their identity
- Software Development Support Center created
 - Help Development Build Better Software Faster
 - Thought Leadership
 - Coaching
 - “Be the Change” Mindset

Enable a relentless passion for removing impediments



- Over a 16-month period
 - Matrixed teams became co-located dedicated teams
 - Performance evaluation practices changed
 - Reward and recognition became more commonplace
 - Project delivery policy shrunk to 1.5 pages
 - Stopped gathering & reporting organization-wide metrics
 - Developers stopped reporting time
 - Process compliance went away
 - Employees are coached rather than told
 - Test Driven Design techniques proven to work in our environment

Coach Development Teams



Focus on Coaching not Training
Feed the Agile Support while Starving the Resistance

- Established Scrum as our agile project framework
 - Partnered with Ken Schwaber
 - Methodology unique to each project
- Add Developer practices
 - Partnered with Brian Marick
 - TDD, Stories
- Add Product Owners
 - Partnered with Kenny Rubin
 - Agile Connections

Connect Product Owners from the start



- Problem
 - Development outpaced the level of product owner involvement
 - Projects started slow (3 months prior to having a reasonable backlog)
 - Requests from Development Teams to pleeeeeeas train my product owner
 - Most were interpreting Agile using their own filters
- Solution
 - Get ScrumMaster, product owner and whoever they invite to learn how agile is different. Learn and practice the basic practices, stories, estimating, sprint planning, retrospective
- Result
 - Teams start with an estimated backlog that is reasonably complete (at least good enough for an effective initial planning meeting)
 - Product owners love it, which causes project teams to be more effective from day one
 - Participants are beginning to “Pay It Forward”

Never stop looking for opportunities



- Assume No Boundaries
 - Enterprise Technology Operations implementing an Infrastructure Solutions Management Team
 - Agile mainframe development
 - Agile package integration – We include vendors in workshops
 - Developers accountable for quality
 - Architecture
 - Portfolio management

What does a product owner say today?

Agile is a common sense approach for software development. Here are a few other direct benefits we have seen:

- Learning – we have been able to learn how the system operates and adjust requirements accordingly to improve process flow, procedure and controls.
- Testing – we have been testing since the first delivery, which enables us to improve functionality and be better prepared for pilot as we go forward.
- Feedback – we have been able to demo actual system functionality to field representatives and get input.
- Training – we have begun training modules prior to system completion and could not do this without agile.
- Confident flexibility – we gained consensus on the idea that quality of system delivery and training effectiveness is more important than meeting a date!

What does a ScrumMaster say today?

“Our individual contributors are much more empowered. They no longer view my role as a hindrance due to the removal of heavy documentation and process requirements that were in existence within the PMO. Command-and-control project management style no longer fits within our organization – I am there for the team to remove impediments and I rely on them as experts to drive the technology development work along with our business partners.”

What does a developer say today?

“Development within KTS has by far taken more steps into understanding the mentality and role of a software developer in the past 12 months than it did in the previous 5 years. Innovation is a performance measurement, and developers are consistently reminded that it's okay to think different and question existing practices. Some of these topics include what tools do we need, how can we communicate better with the client or what are the boundaries between excessive documentation and well-written tests. Developers are given the opportunity to weigh in on those decisions and, wow, have we done so.”

What do our external regulators say today?

They interviewed 20 ScrumMasters and took a deep dive into the project documentation.

The results:

Zero findings, zero actions and a few observations

One Observation:

Project documentation reviewed was consistent and matched the needs of the project, which was surprising to them, because no one told teams what they had to do and/or checked that it was done.

How has our work space changed?



FUN is no longer a 4-letter word



Lessons learned along the journey



- What would we do differently?
 - Earlier focus on the principles of Lean Development
 - Earlier focus on the retrospectives (feedback of people, of project, of feature)
 - Earlier introduction of user stories
 - Earlier recognition that agile adoption across the organization is a leadership challenge
- What would we do the same?
 - Focus on a continuous flow of business value as the end result and agile as the means to achieve it
 - Focus on eliminating all bureaucracy instead of fitting agile into the existing bureaucracy
 - Engaging industry experts to gain instant credibility
 - Coach teams, don't tell teams (enable agile, don't roll out agile)