



Agile Alignment System Implementation

Case Study

Project Overview

A fintech company experiencing rapid growth in the risk monitoring space requested help implementing a software development program overhaul. They had recently acquired an organization, and their current processes didn't scale with the increase from 3 to 7 software development teams. This resulted in confusion at the leadership level on what was being worked on, and frustration at the team-level with constant bottlenecks and changes in priority.

Objective

Our team was asked to evaluate the program and make recommendations to improve the software development practices of the organization. Our goal was to enhance leadership visibility, improve predictability of delivery collaboration, and maximize the value delivery of each team.

Initiative and Results

In a 6-month engagement, we implemented key components of the Agile Alignment System across seven product teams. Our main focus was to optimize processes in the organization so teams could deliver more value and leadership could make informed decisions with the right data. Each component of the Agile Alignment System was implemented throughout the organization:

- Organization and Key Roles
- Agile Team Practices
- Product Team Process
- Delivery Practices
- Metrics
- Reporting and Executive Comms

Organization and Key Roles

The organization was operating without a true concept of teams. Engineers were being assigned to projects whenever they arose without consideration to capacity or priority. This led to bottlenecks, dependencies, and a general feeling of chaos.

Our team started by doing a value stream exercise to identify product teams, determining which technical domains they owned, and assigning people to key roles. Once everyone was assigned to specific agile teams, we created a Program Execution Chart and shared it with the organization.

Agile Team Practices

Each newly formed team then consolidated all their work from 20+ multiple backlogs into a single JIRA backlog per team. The program then determined a standardized Scrum sprint cadence which all teams aligned to. Everyone in the program started and ended their sprint at the same time, with the same sprint number. This change unlocked reporting capabilities and improved dependency communication.



Additionally, each team completed a Team Agreement to ensure everyone on the team was aligned on who was doing what, what each kanban board state meant, and what the definition of done was.

Product Practices

The product was using a traditional Business Requirement Document to transfer requirements to the engineering team. These documents would take weeks to months to complete, and they became obsolete once passed to the engineering team as changes in requirements emerged.

We implemented a Product Canvas, Prep, and Story Mapping process to tighten the feedback loop and bring engineering into the requirement process earlier. This reduced the time from Idea to Starting Development by over 50% and reduced the waste of building lower priority functionality.

Delivery Practices

Once some standardization in team structure and process was achieved, we were able to solidify the gains by focusing on the program's delivery practices.

We instituted some lightweight field standardization in JIRA and ensured all work the teams were doing was reflected in the system. This allowed each team to clearly prioritize their own backlogs and improved overall predictability.

We also implemented a program level "How We Work Document" and Quarterly Alignment Session to improve standardization, speed up onboarding, and drive alignment through the program. The Quarterly Alignment Session brought everyone in the program together to review team wins, talk through personnel and process changes, and give leadership a forum to provide strategic direction.

Metrics:

After the organization had standardized JIRA operations, we were able to start gaining insights into key metrics to provide the team and program leadership visibility into team efficiency.

- Predictability: How much was delivered vs planned each sprint.
- Allocation: How much did each team spend on CapEX vs OpEX, and New Functionality vs Bugs/techdebt.
- Cycle Time: How long did each team spend from active to close on an average work-item.

Once the metrics started to be tracked, teams were able to see areas where they needed to improve. In one case a team went from 5% CapEX allocation to 35% in under two sprints.

Reporting and Executive Comms:

One of the key issues facing the program was a lack of leadership visibility. Once the organization began operating in a standard cadence, we were able to implement sprint reports and a recurring six-sprint view. The sprint report was sent to everyone on the agile team along with leadership. The simple email with an extract from JIRA showed what the team completed and their plan for the upcoming sprint.

The six sprint view is a consolidated six sprint roadmap showing what major initiative the team was working on, when they expected it would be completed, and what was next on the horizon. This product was compiled by the Delivery Manager and sent to everyone in the program. It drove alignment across the program and allowed for risks and dependencies to be highlighted.



After implementing these reporting products, major priority decisions became visible, and leadership was able to ask the right questions to make the right decisions.

Conclusion

Our commitment to best practices, coupled with the dedication of our consultants, has resulted in a streamlined and transparent process that not only meets but exceeds expectations. We delivered a system that provided leadership visibility, enhanced the team's ability to deliver value, and improved communication across the organization.

"The change implemented was transformative in how we operate and unlocked efficiencies we didn't know existed" - CTO