Epic Agile Transformation on an Incredibly Tight Timeline

Case Study:
Agile Transformation and
Atlassian Jira + Jira Align Adoption

Company Details

Industry: Financial services
Company Size: 15,000 Employees
Location: U.S.
Products: Financial services in the academic, research, medical, cultural and governmental fields

Change is always challenging, especially for large companies well-established in their markets. But, it's also a necessary process for any company pursuing growth and relevance in today's economy. With a development team over 5,000 strong and tight time constraints, this large American financial services company entrusted Cprime with guiding an enterprise initiative for their Agile transformation and software tool migration. The results were impactful, and the lessons learned by both parties were profound.

Overview

This Organization is a large financial services firm that is a leading provider of financial services in the academic, research, medical, cultural and governmental fields, with over 15,000 employees across the US.

A lot about the organization's clientele and the financial environment they're living in has changed, however. And this is the reason the Organization is committed to continuous improvement in the breadth, depth, and quality of the tools they provide their agents and clients, and the speed with which those tools are developed.

That's why the organization undertook a massive Agile transformation beginning in March of 2018, choosing Atlassian tools for their robust capabilities and Cprime to guide them along this important journey.

Challenges

Like any large, successful companies, this financial services organization faced a host of challenges leading up to and during their Agile transformation:

- An aging, inadequate set of solutions that duplicated or negated each other's output
- A large, diverse group of developers who yearned for a better solution, but paradoxically clung to the old one
- A whole new agile framework (SAFe) that had a steep learning curve and changes to culture
- Three separate agile methodologies being used across the organization plus waterfall execution on other efforts
- The standard twin challenges facing all large organizations managing change: inertia and momentum
- And, on top of all this, a shorter-than-average time frame due to looming tools license expirations

It Started With Seeking Out a New Tool...

The journey began when the Organization recognized that their current development management and collaboration solution — Rational Team Concert (RTC) by IBM — was no longer filling their needs, and was, in fact, creating bottlenecks in an already complex delivery process.

> One of the key stakeholders recalls the situation this way: *"We had to get off the RTC platform. In our environment, we had way too many tools doing work item management — same workload, same type of work, but three different tools. And the idea was to get down to one tool that could work and drive us forward."*

So, the Organization began hunting for a new tool to better support the scrum-based agile development process they had in place.

After some time, they were working with a consulting firm and had determined that Atlassian Jira was the core tool they wanted and needed. They were on the cusp of signing a contract to move ahead with a Jira implementation. However, they ran into some pushback from the business teams who were suggesting CollabNet VersionOne or Rally because they were concerned about Jira being able to scale effectively and provide the kind of reporting and analysis support they desired.

At that critical juncture, the stakeholder attended the Atlassian Team Tour in New York City and happened to sit next to members of the Cprime team. Cprime's CEO, Zubin Irani, was speaking at the event along with a panel of Cprime experts. The stakeholder recalls the representatives of Cprime were *"way beyond in terms of technical knowledge, business knowledge, and in discussion of how and why to use Jira."*

The Stakeholder contacted Cprime the following day and discussed his concerns about scaling Jira with the consulting firm the Organization was currently working with, and how the tool could satisfy the business teams' requirements as well. He'd decided that Cprime's clear domain expertise and experience working with larger companies was a vital piece of the puzzle. So, the Organization began working with Cprime to start their agile transformation journey.

...But It Went Far Deeper Than That

Ricardo Villalba, Senior Managing Consultant, Rebecca Velasco, Principal Solutions Architect, and Tina Behers, Delivery Director - Business Agility, took on working directly with a key stakeholder and others in the Organization. After discussing the current situation and the team's optimal future state, it became clear that the company was really looking for far more than a new tool.

With over 5,000 potential users distributed across multiple teams and locations, the organization was implementing several different agile methodologies concurrently. The partial buy-in for RTC from the larger user community engendered a "wild west" atmosphere.

The organization desperately needed a clear and simple roadmap to transition from their current state to a unified, and truly agile environment.

And, to complicate matters even further, what would normally have taken a minimum of twelve months had to be completed in just six months so the organization would not be forced to renew their contract with IBM, and incur a significant expense.

Solution

Over the course of several deep discussions, the Cprime team developed a clear strategy that would guide what they quickly realized was a true Agile transformation:

1. Developing an adaptable schema template for Jira that could be customized to bring together three different levels of detail into one cohesive platform to optimize integration with Atlassian Jira Align (formerly AgileCraft).
2. Categorizing and prioritizing nearly 500 projects to promote the fastest, smoothest migration possible
3. Leveraging those teams and individuals who were most enthusiastic and supportive of change to test and optimize the system, easing the adjustment period for those who were less enthusiastic
4. Run (essentially) three simultaneous agile transformations across the organization to coach and educate teams to run basic Scrum, Essential SAFe, and the Full SAFe Stack using Jira for Scrum, Jira at Scale (with Jira Align), and Jira Kanban as appropriate.

Not As Easy As It Sounds (and It Doesn't Even Sound Easy!)

While complex and daunting on paper, implementing this solution across such a large and diverse organization within a tight timeframe was incredibly challenging.

> *"They helped us make some really, really tough decisions,"* the Stakeholder said, recalling working with Rebecca and Ricardo, *"we would have some really tough discussions and talk like how families sometimes talk to each other."*

"We asked Tina to provide best practice for not only the tool, but moving forward with a solid scaling approach to maximize the people, process and tools," the Stakeholder added, *"and not get us into the same problems we had experienced in the past."*

The Template

"The Jira template is magic." the Stakeholder said, "It isn't Jira that was magic; it's *what you did with Jira.*"

The Jira template Cprime developed incorporated those portions of the core Jira solutions needed by each business group while cordoning off those portions that were unnecessary. It could be tweaked and customized by the various units to work optimally for their circumstances and workflow, while still maintaining the unifying platform at the bottom of the stack.

The template was designed with the best practices for Jira use and considerations of how the Atlassian APIs work to maximize the needs of the development teams, like DevOps needs:

- Eliminating unnecessary customizations for business reporting needs (i.e. Financial information, shared projects at the team level, etc.).
- Allowing that information to be sourced in Jira Align where the connection to Strategy can be viewed and reported on for value realization, budgets, costs, completion and status of portfolio epics.

As a result, all business units could be onboarded and trained in roughly the same way. And, having all business units on the same platform opened up reporting functionality that had never existed before. The addition of Jira Align was particularly a game changer that the Organization fell in love with:

"Jira Align (formerly AgileCraft) was the leader in the space. They had a very compelling user interface, a comprehensive dashboard, and everything else we needed for the portfolio. And for me, as the person that owns the template, it creates clear separation and visibility."

Project Categorization and Prioritization

With nearly 500 projects spread across over 700 development teams and over 5,000 developers company-wide, there was going to be no way to migrate everything from RTC to Jira at once without creating utter chaos.

To resolve this issue, Cprime facilitated multiple discussions with the Stakeholder and other transformation champions to come up with a list of attributes that could be used to effectively categorize and prioritize projects based on complexity and determined the best level of the integrated stack to be the new source of record for these key attributes.

Regarding this process, the Stakeholder recalls, *"We went through all the projects and prioritized them by complexity. So, we would batch the first ones that were simple and import those. And then we would hold a retrospective to find out what we did right and what we did wrong, how we could improve. Then, we fixed everything up and let those teams go to work. Then we grabbed the next batch. So, by taking this layered approach, we were eventually able to automate the process. It was very smart and very discreet."*

The more complex a project, the later it would be migrated over to Jira to allow for as much preparation, testing, and developer training as possible. Meanwhile, the simplest projects could be migrated early on, allowing for early adopters to begin working in Jira using the newly designed template and building a practical foundation of success on which to build later migration efforts. This approach allowed the Organization to unify teams into trains and move groups of projects rather than individual teams to Jira and integrate with Jira Align to start pushing visibility up in the organization.

Leveraging early adopters

As is almost always the case with tool adoptions and agile transformations of all shapes and sizes, there were team members who were enthusiastic about the change, and those who weren't. A key part of the strategy in this case was to enlist a small but vocal group of early adopters as ambassadors to help boost cooperation early in the transformation.

One of the factors that made this strategy so successful was the greater-than-average level of buy-in the Organization's leadership brought to the table. From the top down, executives and managers across development teams were heavily invested in the program from the start. This was instrumental in getting the word out early and often, which in turn boosted the level of trust across teams, and eventually, the rate of adoption and success of onboarding.

Three simultaneous transformations

Finally, with early adopters and the Organization's leadership leading the charge, the customizable Jira template, associated software, and Jira Align were implemented in a quick but controlled migration. At the same time, developers across the organization were onboarded, trained, and coached for success in one of three variations on the SAFe/Agile theme.

As all aspects of this strategy moved forward — sometimes in parallel, sometimes in sequence — it was absolutely vital for the Cprime team to build and maintain trust quickly and effectively.

> Rebecca Velasco relates, *"There were three key characteristics of our modus operandi we knew we had to ingrain into everything we did for the Organization: listening, over-communicating, and showing the teams 'the future' they were going to experience."*

- Listening - There were ongoing opportunities to hear feedback from leadership and team members across the organization. The Organization has long encouraged a culture in which everyone gets their say, and it was important for Cprime to instantly fit into that culture and hear out even aggressive and challenging voices.
- Over-communicating - At the same time, Tina, Rebecca and Ricardo needed to establish opportunities to get their own messages across as well. This translated into an intense schedule of stand-ups (held via video conference), training lectures, coaching sessions, and weekly demos with the diverse and often remotely-located teams. This continued post-migration with regular "office hours" that allowed project owners to ask questions and get help as needed.
- Showing them the future - Especially as the earliest projects started being migrated to Jira, and with the help of the ambassadors identified at the outset, every opportunity was taken to document early successes and use them to illustrate what the eventual outcome could be for everyone involved.

"Moving at the Speed of Trust"

Looking back at this tremendous undertaking, the level of success is even more impressive. The clearest underlying theme that carries throughout is trust:

- The Organization's trust in Cprime's expertise and ability to scale to meet their needs
- The Organization's leadership team's trust in Tina, Rebecca, Ricardo, and the other Cprime consultants who were steering the project
- The trust that needed to be quickly and effectively developed with hesitant developers who tended to cling to the status quo
- Trust that needed functionality of long held tools could and would be available within Jira Align and Jira to escalate SAFe adoption and best practice adoption.
- The whole organization's trust that the "end" of this journey would more than justify the means
- Trust in Cprime's ability to help stand up a volunteer Community of Practice (COP) to continue fostering ongoing agile standards and best practices across the organization to promote Business Agility.

"(Development) teams love what we did in Jira," the Stakeholder stated, *"and the business folks love Jira Align (formerly Agile Craft) and how we integrated it all together. That program layer put everything together. It endears them, endears them to the solution. Really. They're happy."*

He went on to explain, *"What's beautiful about it is the community. Now, suddenly when team members talk, they're realizing that we have fiduciary responsibility for everything we do beyond the coding. But they even talk about the template in terms of value and money. So, we have a COP now that's volunteer."*

Highlighting the impact of the custom Jira template Cprime helped develop, the Stakeholder notes, *"Once you get the template, you get it. They see the value when a new team or team member comes on, training is so much simpler. Our teams have become more cross-functional and nimble because it's essentially the same template on every team. So, they're not fighting the tools anymore."*

Cprime and the Organization developed an excellent working relationship and rapport that's survived the official end of this engagement. As one of the key stakeholders describes it, *"So as far as I'm concerned, Cprime hasn't left because Tina, Rebecca and Ricardo still ping me off and on. They still help me when I need something, I still have questions at times, and they always respond promptly. So, as far as I'm concerned, (Cprime) is like family."*