Migrating From SharePoint to a Better Scrum Tool

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Kelley Blue Book

Agenda

- Background
- Selection
- Evaluation
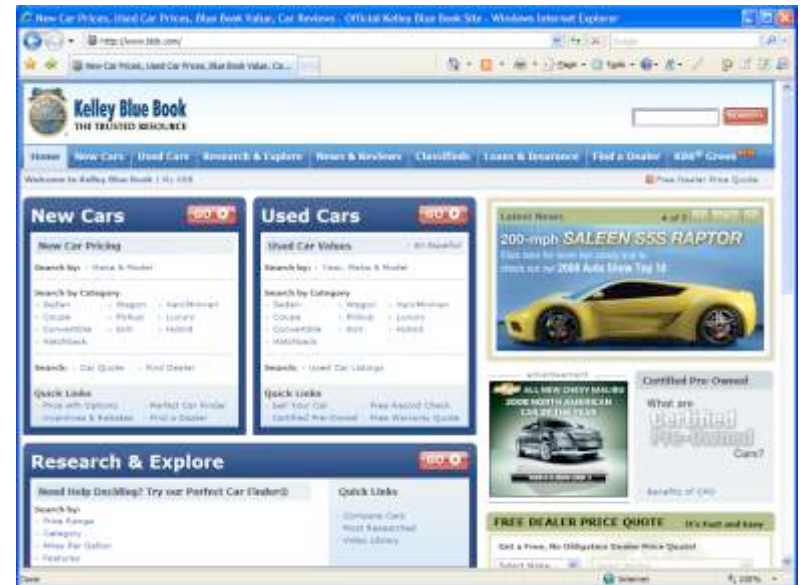- Implementation
- Guidance for Others
- Q & A

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Background

Introduction

- KBB has been around for over 80 years. We publish automotive values on KBB.com and has numerous products for the automotive dealer & OEM, finance, and insurance markets

- KBB has been working with Scrum since 2005
    - Moderate Scrum experience level
    - Currently 18 teams/200 users
    - 4 locations – CA, AZ, China, India

Why Did We Need A Scrum Tool?

- Issues With Excel and SharePoint
  - Inconsistent Scrum implementations
    - Backlog fields different
    - List locations varied among teams
  - Difficult for users to manipulate backlogs and lists easily
  - Manual report and metrics generation
    - For teams
    - For departments
  - No easy enterprise/senior management visibility

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Selection

Tool Selection

- Key Considerations:
  - Limited selection resources and time
  - Did not want bleeding edge technology
  - Network and Infrastructure
- Focused On:
  - Usability for the teams
  - Functionality (reporting in particular)
  - Configuration
    - Based on teams and departmental roll-ups

Ouija Board

amazon.com® **Customer Reviews**

18 of 24 people found the following review helpful:

★★★★☆ **Any Ouija equals a big no-no**, October 22, 2001

… Ouija board may be fun to play around with, but it is NOT A TOY!!! This instrument should be used by only the advanced sorcerer or witch or higher...
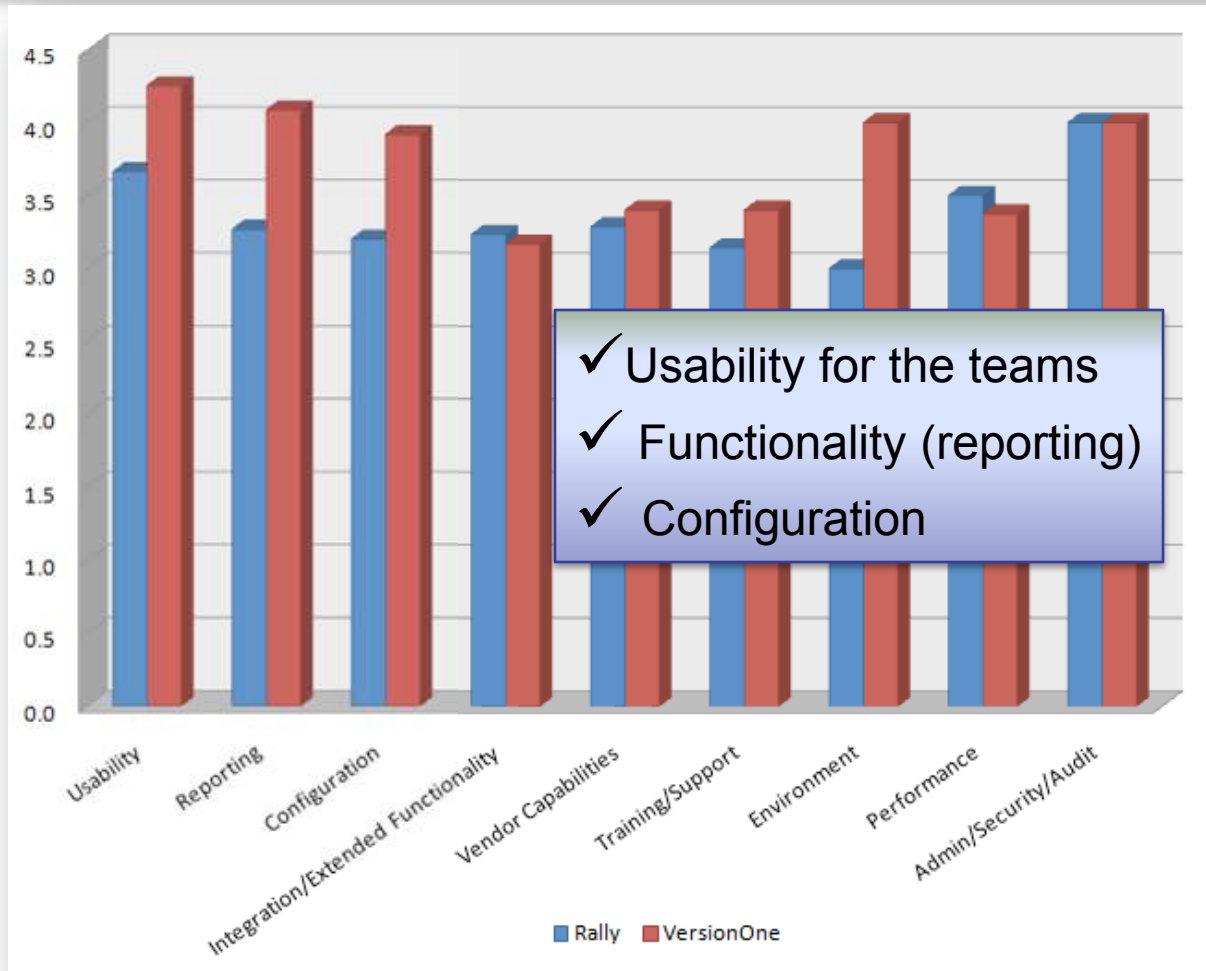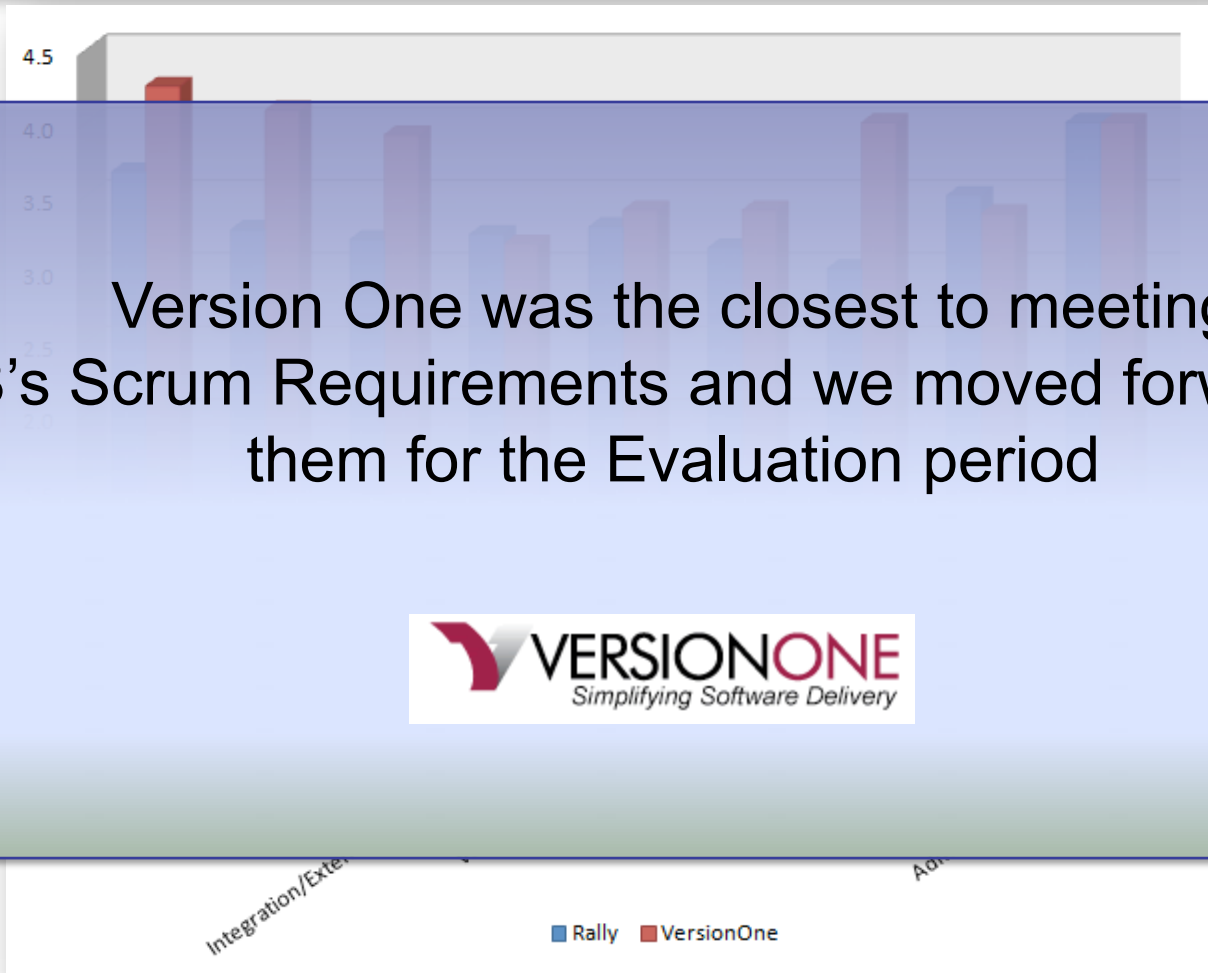
Selection Approach

- Standard vendor selection approach
  - In-depth research and discussions w/ short-listed vendors
  - On-site demonstrations w/ key individuals – technical team, product team, and infrastructure
  - Quantitative and qualitative input
  - Reference calls

- Communications
  - SharePoint site
  - Road-show for Sr. Management
  - Scrum Master and Product Owner forums
  - 1:1 meetings with key individuals as needed

- Decision Making for Product Evaluation
  - Senior management team using input from research, demonstrations, and reference calls

Background Selection Evaluation Implementation Guidance

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Quantitative Results

✓ Usability for the teams

✓ Functionality (reporting)

✓ Configuration

Background | Selection | Evaluation | Implementation | Guidance

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Quantitative Results

Version One was the closest to meeting
KBB's Scrum Requirements and we moved forward with
them for the Evaluation period

VERSIONONE
Simplifying Software Delivery

■ Rally ■ VersionOne

<u>Goal</u>: Quickly confirm our initial impression

Evaluation

The Evaluation Approach

- Trial: 4 weeks, 2 teams, 2 sprints per team
- Hope: Stay on VersionOne after trial, avoid "roll-back"
- Open process: Visibility
  - Project SharePoint site
  - Communication
- Preparation
  - Kick-off meetings with teams
  - Pre-training through recommended reading, recorded webinars, online tutorials, etc.
  - VersionOne professional services
    - Set up and configuration
    - Training

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Sample Screenshot from our Project SharePoint Site

Announcements

Important docs

Links

Calendar

Team schedule

Contact info

Background | Selection | Evaluation | Implementation | Guidance
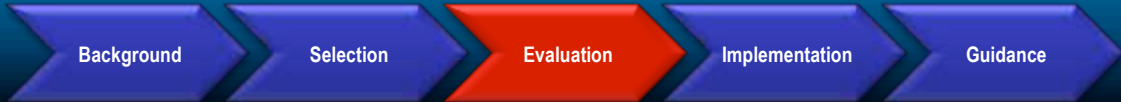
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The Teams

- Criteria
  - Non-critical product delivery during evaluation phase
  - At least 6 months Scrum experience
  - On-shore and off-shore team representation
  - External product preferred
- 1 on-shore, 1 off-shore team selected

Blitz
- On-shore
- 2 week cycle

Thunderbirds
- Off-shore (India)
- 2 week cycle
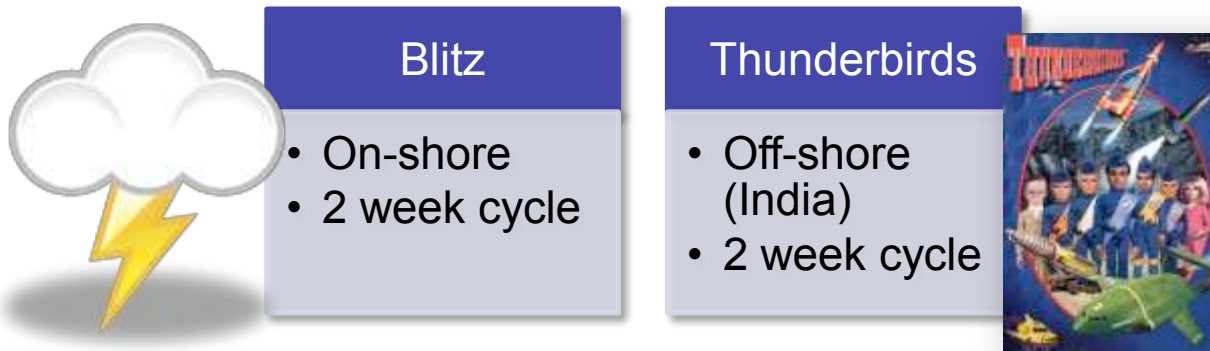
The Evaluation Process

✓ Prepare & configure environment

✓ Map & import teams' backlogs

✓ Team

  – O

  – R

✓ Start

  – W

  – W

✓ Stay

Results:
➤ Teams comfortable
➤ No significant impact on teams and their productivity
➤ Addressed questions around reporting

⇨ **Green light to proceed**

✓ Weekly, open touchpoint meetings

✓ Check point with sr. management half-way through trial

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Goal: Roll out VersionOne to all teams in an efficient and repeatable manner

Implementation

The Implementation Approach

- 18 teams requiring
  - Repeatable approach
  - Consistent implementation
- In-house training
- Roll-out from team to team, except…
- Interrelated teams implemented at the same time
  - Same product backlog
  - Shared resources (virtual teams)
  - Same Scrum Master and/or Product Owner
- Visibility & communication
  - Yada yada yada

The Implementation Process

✓ Assessment

✓ Preparation

✓ Training

✓ Product Backlog

    – Mapping

    – Cut-over

✓ 1st sprint: Coaching and observing

    – Sprint planning in VersionOne

    – Sprint execution and monitoring

    – Sprint closure

✓ 2nd sprint: Light touch

The Initial Results

- 12 teams out of 18 implemented (on schedule)
- Single system for all Scrum data
- Consistent implementation
- Rich Scrum-specific functionality
- Time savings
- Norming and convergence of Scrum practices
  - Use of story points
  - Treatment of unplanned tasks and production support
  - Approach for dealing with shared resources
- Improvement of general discipline with data capture

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Samples of VersionOne Functionality

Background Selection Evaluation Implementation Guidance

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Lessons Learned

- Preparation and training are critical
- No negative impact on productivity during transition
- Only 1-2 sprint cycles needed to get fully comfortable
- Every team is unique and has its own idiosyncrasies
- Teams will need to make adjustments
- An Agile tool does not *solve* team or process issues. It *uncovers* and *magnifies* them.
  - Diverging practices
  - Lack of discipline

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Next Steps

- Complete roll-out
- Expand use of the tool
- Investigate integration with development tools, defect tracking or test automation tools
- Evaluate add-on/plug-in tools and system extensions
- Gather Agile metrics in a systematic fashion company-wide

Background   Selection   Evaluation   Implementation   Guidance

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Guidance for Others

Guidance for Others

- Plan an evaluation period to work out the kinks
  - Use Professional Services to address configuration, training, and roll-out approach in the beginning
  - Create a multi-level support structure to make it easy for everyone to get information
  - Capture feedback and apply for each team being spun-up
- Use the roll-out period to tighten up Scrum process improvements organization wide
- Don't throw SharePoint away!
- A Scrum Tool is not a "silver bullet"
  - Whatever issues you have in the organization or with your Scrum implementation, they will only be highlighted

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Q & A

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