From Cradle to Sprint
Creating a Full-Lifecycle Request Pipeline at Nationwide Insurance

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So the story goes....

Within a big corporate world a small team adopts Scrum & XP.

Initial successes are soon choked by the reality of external dependencies and decision by committee.

The small team adapts, crafting a better way....
Background

Company
Insurance and financial services
Ranked #108 on the Fortune 500

Team
Corporate Internet Solutions

Project
Provide customers with a unified view of their relationships with Nationwide
02.2008
Quality and pace of delivery concerns appear.

04.2008
LitheSpeed hired as Coach and Trainer.

05.2008
RedFishBlueFish team formed.
Sprints #0 - 8

- Code Quality was markedly improved
  - System Test first pass rate = 90%
- Team members were more engaged
- “Generalizing specialists” began to emerge
Sprint #9

...we stumble
Sprint #9

- Velocity plummets from 32 to 1.5
- The acceptance criteria for 17 stories cannot be met
  ...and won’t be met during the next Sprint due to dependencies on external teams.
Panic
Retrospective

- Initial Release Plans underestimated cross-project dependencies
- Gaining stakeholder agreement on new User Stories was painful
- The Three Amigos were not happy
- User Experience stories were multiplying at an alarming rate
- It was taking weeks to gain committee approval on seemingly minor UE decisions
Inspect & Adapt

• Improve the line of sight between strategy and team-level execution
• Visually manage external project and portfolio dependencies
• Review new User Stories iteratively
• Integrate iterative usability testing
Pre-Discovery & Discovery

Outside the Room | In the Room

Planning

Pre-Discovery → Discovery → Release Planning

Participants:
- Product Team
- IT Architecture
- UE Team
- Key Business Stakeholders

Participants:
- Whole Team
- Key Business Stakeholders
Pre-Discovery Workshops

• Typically 2-4 weeks in duration
• Led by the Product Team to define:
  – Core problems
  – Desired outcomes
  – Success criteria
• Gain business alignment with key stakeholders
Discovery

• Typically a single meeting (1-2 hrs)
• Introduce the project vision, objectives, high level features, and high level UE and IT Architecture to the whole team
• Build the initial backlog, create high level estimates, and identify key dependencies, risks, and constraints
• Gain agreement of core scope and estimates
At one point during the year, our efforts were dependent on 17 other projects. Management of these dependencies absorbed an inordinate amount of ScrumMaster time and energy.
Portfolio Alignment Wall

Think “Scrum of Scrums” that also includes non-Scrum Project Managers

Twice a week 15 min Scrum

Definition of “done”
Portfolio Alignment Wall

Columns are time boxes.

Rows are individual work streams.
Portfolio Alignment Wall
Review New User Stories Iteratively

• The team re-organized the Product Backlog into **5 levels of maturity**, where only the highest level of maturity would contain candidates for Release Planning.

• The levels were based on a *school metaphor*: New card nursery, Elementary, Junior High, High School, and Current Sprint.
User Story Maturity Progression

New Card Nursery
Elementary School
Jr. High School
High School
Current Sprint
New Card Nursery

Anyone may generate a card

Product Owner can:
- Accept into Elementary School
- Reject
- Fast track to High School

flickr.com/photos/12105530@N00
Elementary School

- Product team decomposes epics into Sprint sized stories
- User Experience team determines user research and testing needs
- Gaps in business alignment are identified

User Story promoted when it fits into a release.
Team focuses on card details, acceptance criteria, UE pre-work, compliance and legal approval.

Promoted when key stakeholders approve features, functions & visuals.
Stories in High School are “ready” for the next Sprint.
Real Life

Product Backlog Key & Project Wall Supplies

Release Planning

Deferred Scope

Nursery
Current Iteration
Integrate Iterative Usability Testing (RITE)

Rapid Iterative Testing and Evaluation
- Needs are identified for stories in Elementary School
- Test is incorporated into the standing test lab schedule

- Elementary School
- Pre-Screened Participants
- Story that needs User Centered Design

1st Round
Refine Test Materials
2nd Round
Refine Test Materials
3rd Round

Two Week Duration RITE Test
Participants did not like having to click to see hidden information they felt was important, such as “Other Important Coverage Limitations”.

Round 1
• The [check] and x were not understood.

• Most participants did not correctly understand what the “Coverage Limitations” section meant.
Round 3

- Multiple button labels were tested and “Finalize & Purchase” performed the best.
- The content of this 3rd round tested better than the other two.
Lessons Learned

• Pre-Discovery & Discovery have shortened project ramp up.

• The Portfolio Alignment Wall provides the means to visualize dependencies across teams, but you have to work to make sure it doesn’t become just another status meeting.

• The 5 levels of user story maturity provide the Product Team a means for measuring and visualizing the “Readiness” of stories.

• RITE provides a means to avoid prolonged approval cycles over often minor look and feel issues.
Questions