

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



Background

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Evaluation

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Guidance



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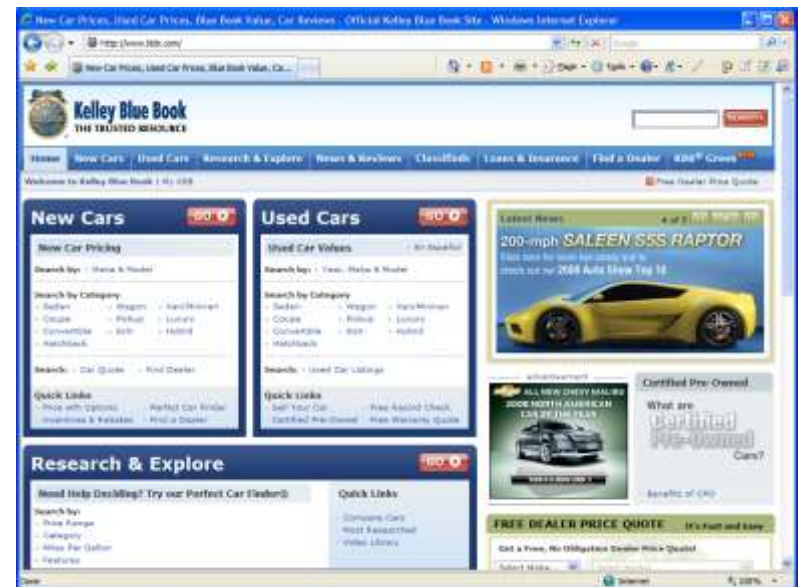
Background



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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



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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



Selection



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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

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Selection Approach



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...

Background Selection Evaluation Implementation Guidance



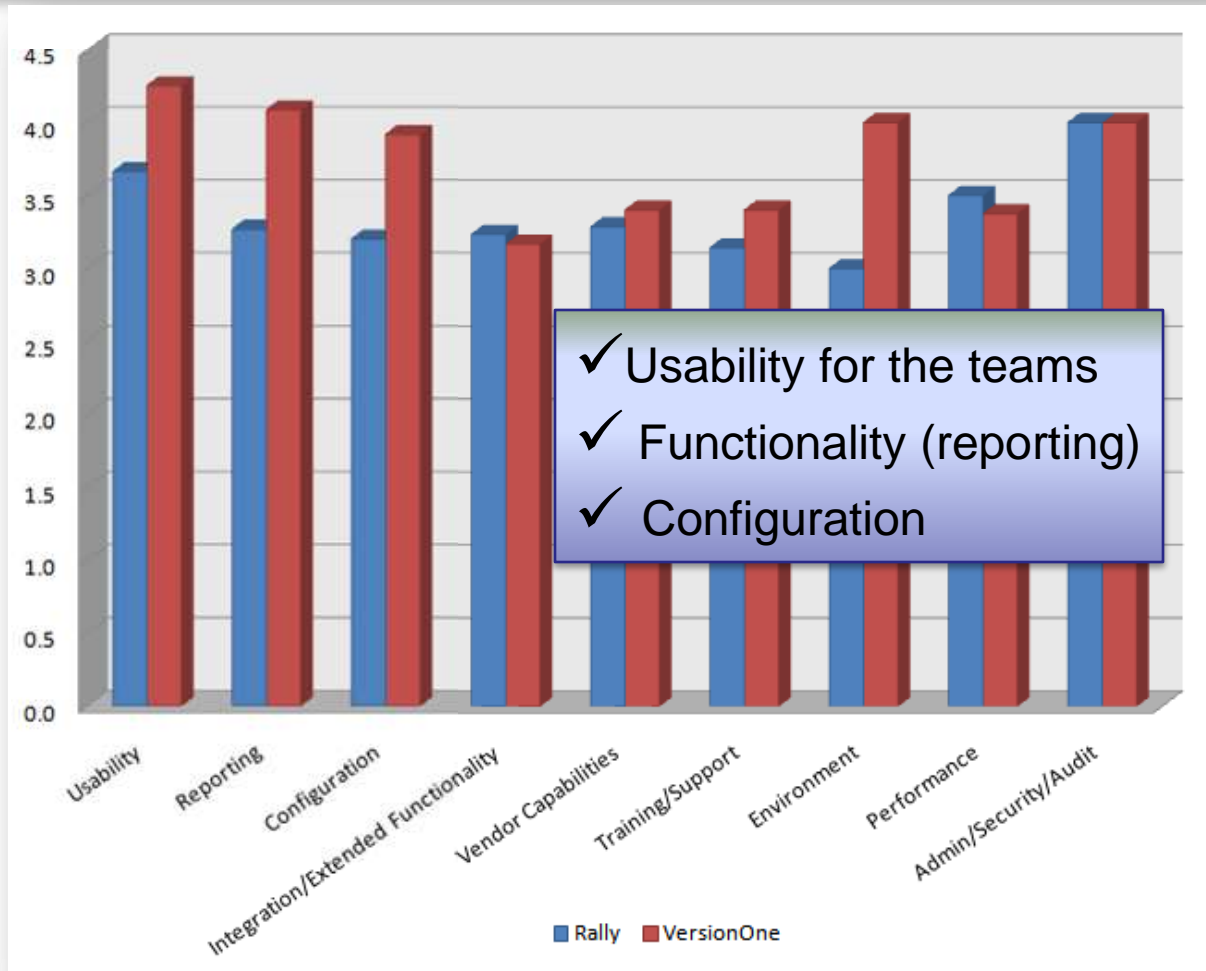
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Selection Approach

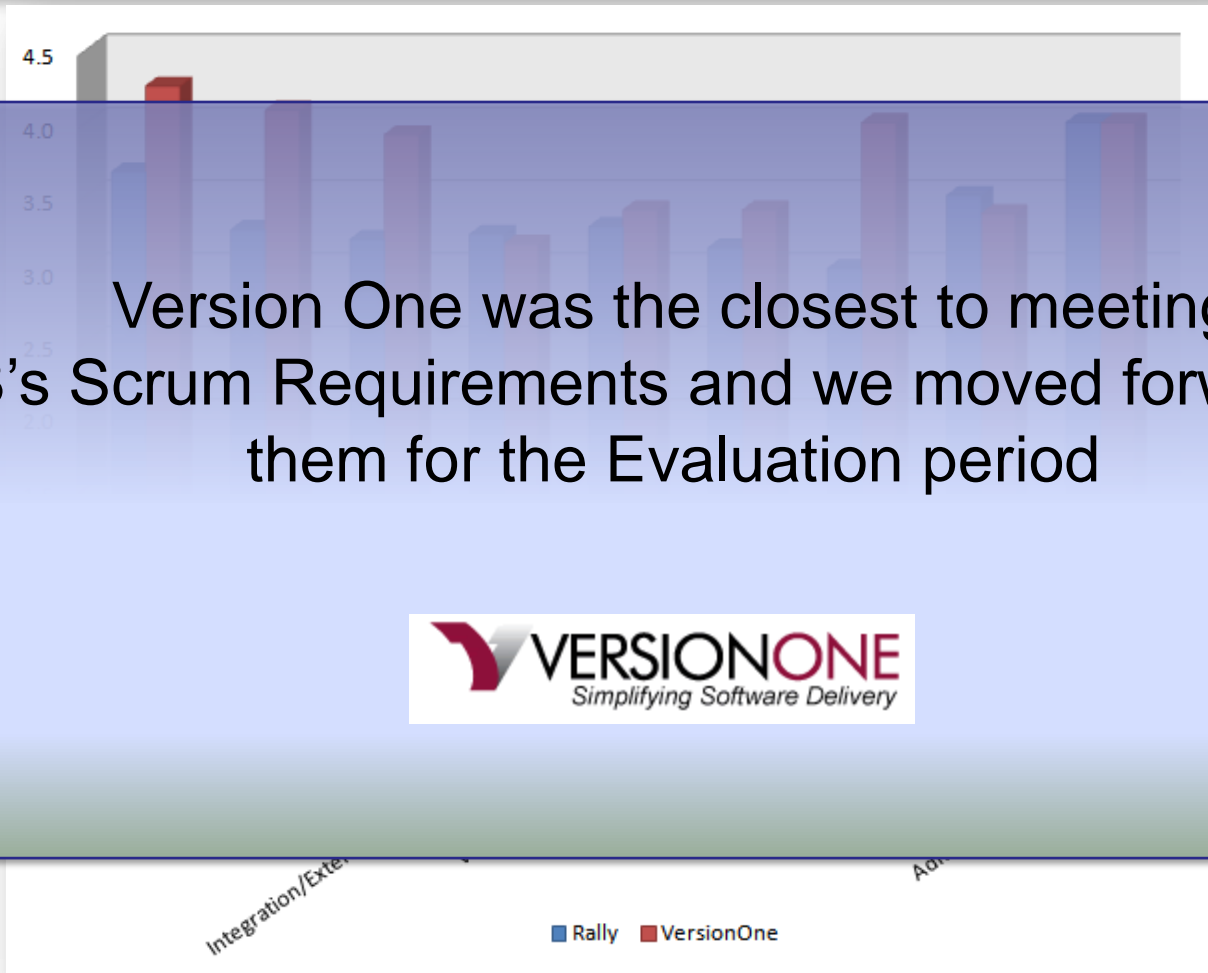
- Standard vendor selection approach
 - In-depth research and discussions w/ short-listed vendors
 - On-site demonstrations w/ key individuals – technical team, product team, and infrastructure
 - Quantitative and qualitative input
 - Reference calls
- Communications
 - SharePoint site
 - Road-show for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



Quantitative Results



Quantitative Results



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



Goal: Quickly confirm our initial impression

Evaluation



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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

The screenshot shows a SharePoint site titled 'Agile Tool'. The main content area features an announcement for 'VersionOne 8.1 and 8.2 Roadmap' dated 4/30/2008, followed by an announcement for 'Access to V1 demo system' dated 2/14/2008. Below these are 'Shared Documents' and a 'Scrum Teams on V1' table. The left sidebar contains navigation options like 'Documents', 'Discussions', and 'People and Groups'. The right sidebar includes 'Links', 'Calendar', and 'Contacts' sections.

Scrum Team	Group	V1 Status	Go-Live Date
Wile E. Coyote	KPO	Live	2/5/2008
Thunderbirds	KPO	Live	2/19/2008
Hercules	Syndication	Live	3/17/2008
Bulldogs	CDM	Live	4/1/2008
Cheetahs	CDM	Live	4/1/2008
Configuration	VIMS	Live	4/30/2008
Valuation	VIMS	Live	4/1/2008
Data Infrastructure	EDW	Backlog converted	5/9/2008
Web Analytics	EDW	Backlog converted	5/9/2008
OSP	OSP	Scheduled	5/28/2008
VISTA	EDW	Future	

Links

Calendar

Team schedule

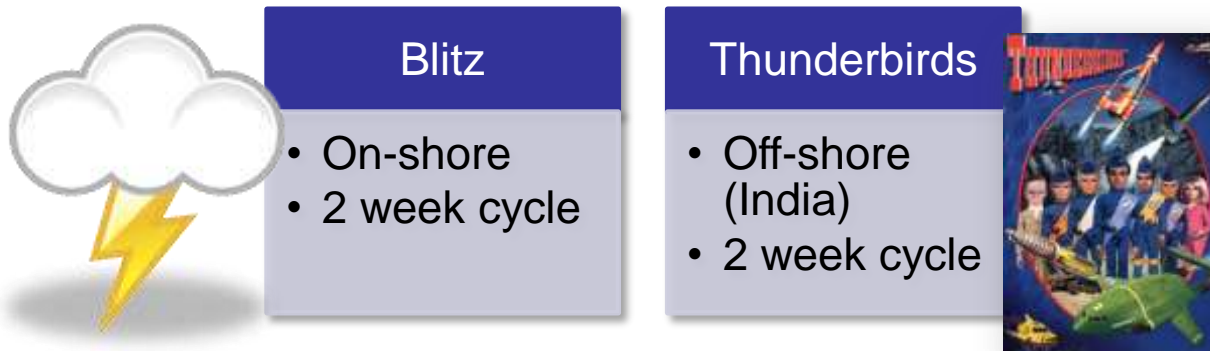
Contact info



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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



The Evaluation Process

- ✓ Prepare & configure environment
- ✓ Map & import teams' backlogs
- ✓ Team **Results:**
 - O ➤ Teams comfortable
 - R ➤ No significant impact on teams and their productivity
 - Addressed questions around reporting
- ✓ Start
 - W ⇒ **Green light to proceed**
 - W
- ✓ Stay
- ✓ Weekly, open touchpoint meetings
- ✓ Check point with sr. management half-way through trial



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

Implementation



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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



Samples of VersionOne Functionality

Sprint Planning : : Bulldogs

Sprint Scheduling | Detail Planning | Member Planning | Issues

Team: (All)

4/1/2008

Total Estimate (pts) - Rollup: 1547.00

Bulldogs 24 | **Bulldogs 22**

Backlog Item Count: 21 | Backlog Item Estimate (pts): 233.00 | Defect Count: 0

Total Estimate (pts): 233.00 | Target Estimate (pts): N/A | Available (pts): N/A

Backlog Items / Defects

Filter - | Sprint: (None)

Move to Sprint: -

Sprint Tracking : : Bulldogs

Project Path: KBB > HSS > CDM > Bulldogs

Administrator | Logout

Detail Tracking | **Taskboard** | Testboard | Member Tracking | Issues

Sprint: **Bulldogs 22** | Team: (All)

Reports: Standup Dashboard

Highlight Owner: **Patryk Symchych** | Workitem: (All) | Show Closed Items:

1-20 of 20

Backlog Item/Defect	(None)	Open	In Progress	Blocked	Completed	Summary
CPO - As a Customer, I have the ability for the show the Certified Number (VIS) or Certified Expiration Date that I entered at the time of vehicle book-in on Window Stickers and Digital Window Stickers. Mary In Progress		QA Device Print / Claudia 3.00 QA AO Print App / Claudia 3.00 QA PDF Maker (D) / Claudia 3.00	Update AO Print / Mary 1.00 Deploy Device Pri / Mary 1.00		Update Device Pri / Mary 0.00 Update PDF Make / Mary 0.00	To Do:11.00
		Build data / Mary 12.00				To Do:12.00
		Incorporate paym / Steve 3.00 Dev - Possible Ja / John Hop 6.00 QA - test function / Patryk 8.00 QA - Deploy solut / Patryk 1.00 QA - Deploy/Veri / Patryk 1.00	QA - Determine s / Patryk 0.50 Design UI for pay / Steve 0.00 Adjust UI design I / Steve 1.00		Research calculat / Steve 0.00	To Do:20.50
		MT - NADA data	QA - Post Deploy / Patryk 1.00 QA - Execute Tes / Patryk 1.00			To Do:3.00

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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



Next Steps

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



Guidance for Others



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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





Q & A



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