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
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
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
Selection Approach

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
Quantitative Results

- Usability for the teams
- Functionality (reporting)
- Configuration
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
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
Sample Screenshot from our Project SharePoint Site

- Announcements
- Important docs
- Links
- Calendar
- Team schedule
- Contact info
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 training
  - On site
  - Remotely (India)
- Start with Sprint planning
  - With VersionOne trainer on site
  - Without changing mechanics
- Stay with teams through sprints, Q&A and coaching
- Weekly, open touchpoint meetings
- Check point with sr. management half-way through trial

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

⇒ **Green light to proceed**
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
Samples of VersionOne Functionality
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/plug-in tools and system extensions
• Gather Agile metrics in a systematic fashion company-wide
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
Q & A
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