

# 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

Selection

Evaluation

Implementation

Guidance



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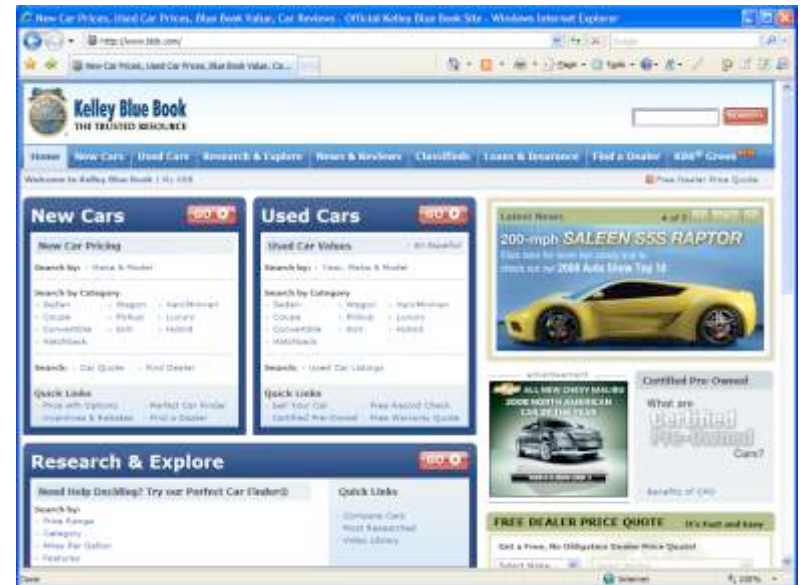
# Background



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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...

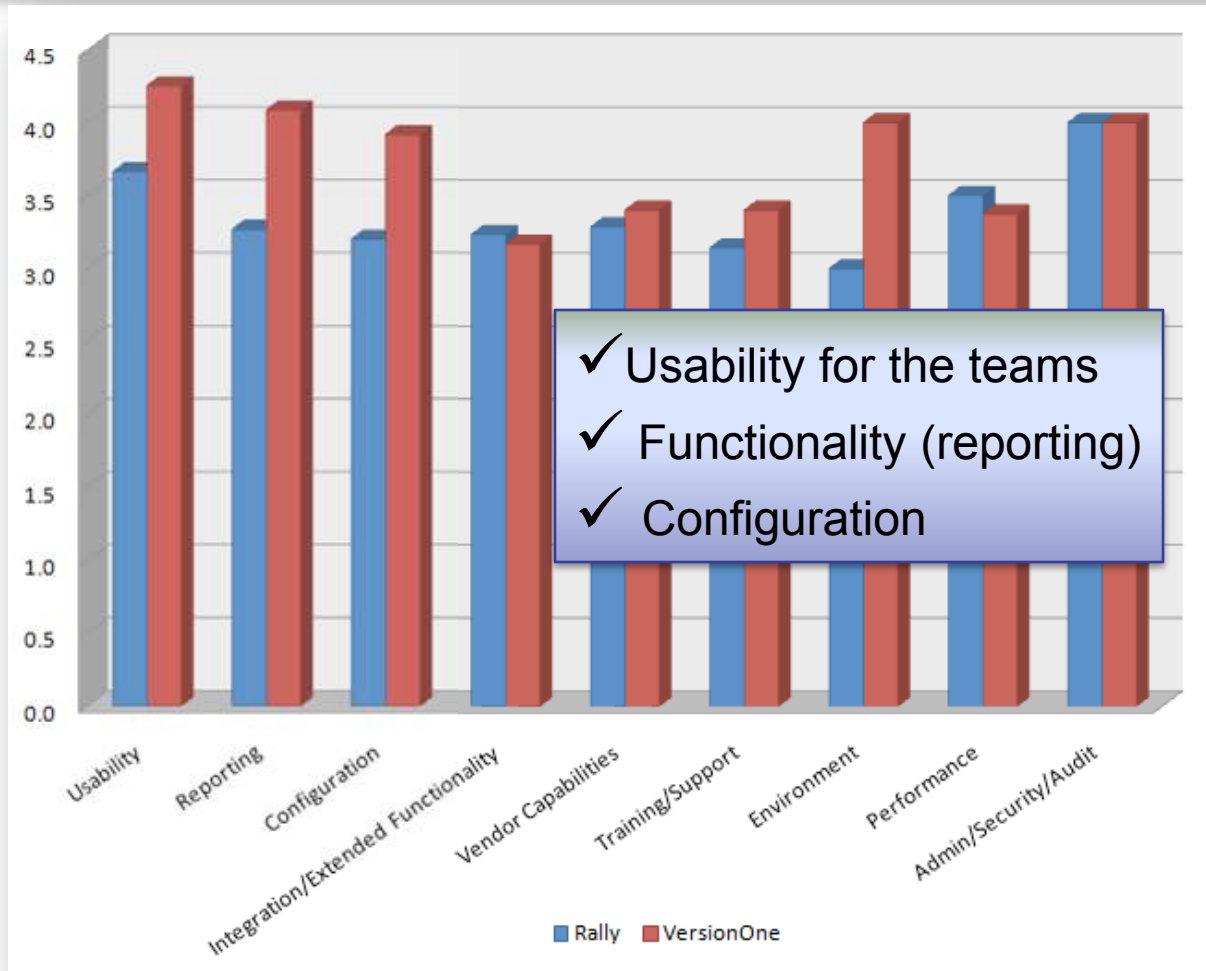


# Selection Approach

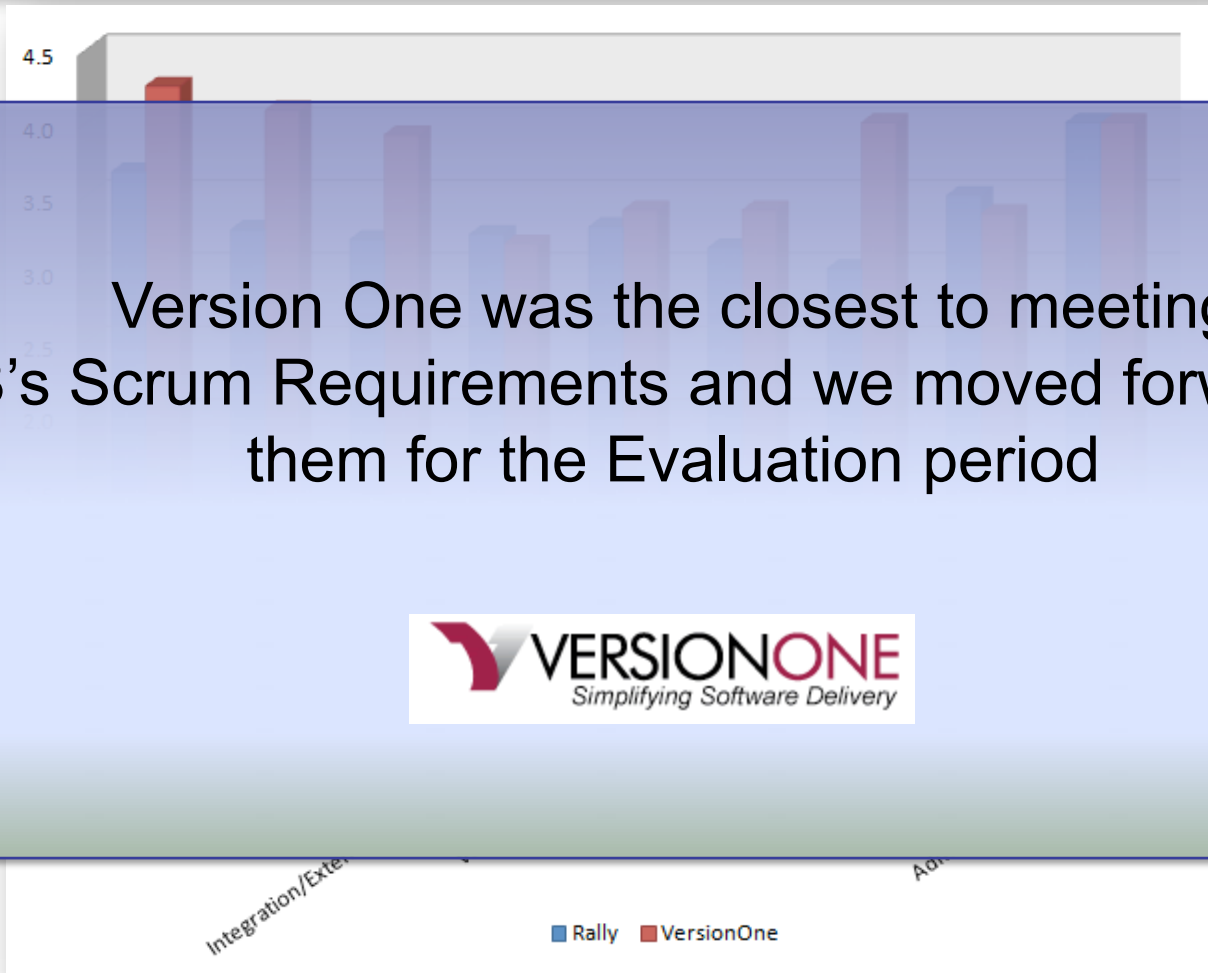
- Standard vendor selection approach
  - In-depth research and discussions w/ short-listed vendors
  - On-site demonstrations w/ key individuals – technical team, product team, and infrastructure
  - Quantitative and qualitative input
  - Reference calls
- Communications
  - SharePoint site
  - Road-show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

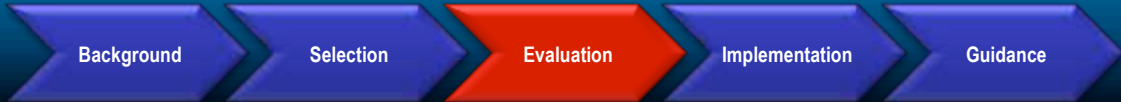
The screenshot shows a SharePoint site titled 'Agile Tool'. The main content area features an 'Announcements' section with two entries: 'VersionOne 8.1 and 8.2 Roadmap' and 'Access to V1 demo system'. Below this is a 'Shared Documents' list with columns for Type, Name, Modified, and Modified By. To the right, there are sections for 'Links', 'Calendar', 'Scrum Teams on V1' (a table), and 'Contacts' (a table). A left-hand navigation pane includes links for 'View All Site Content', 'Documents', 'Discussions', 'Sites', and 'People and Groups'. Callout boxes point to specific elements: 'Announcements' points to the top announcement, 'Important docs' points to the 'Shared Documents' list, 'Links' points to the 'Links' section, 'Calendar' points to the 'Calendar' section, 'Team schedule' points to the 'Scrum Teams on V1' table, and 'Contact info' points to the 'Contacts' table.

Links

Calendar

Team schedule

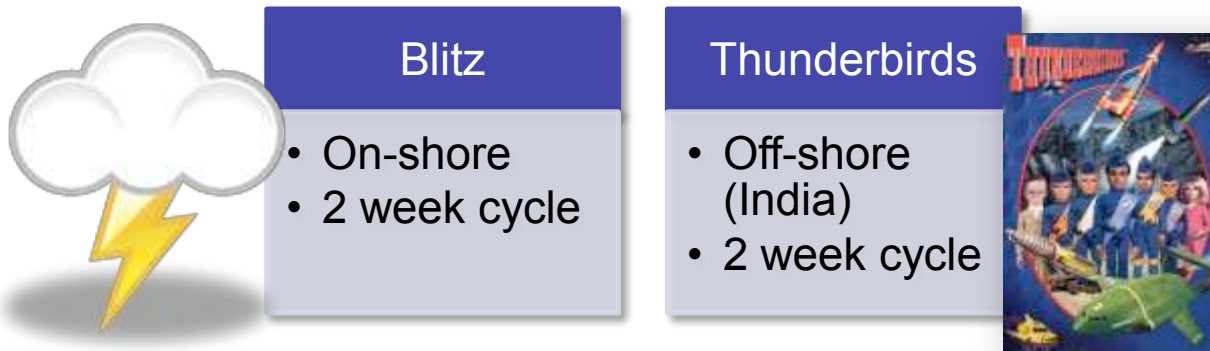
Contact info



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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

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# The Implementation Process

- ✓ Assessment
- ✓ Preparation
- ✓ Training
- ✓ Product Backlog
  - Mapping
  - Cut-over
- ✓ 1<sup>st</sup> sprint: Coaching and observing
  - Sprint planning in VersionOne
  - Sprint execution and monitoring
  - Sprint closure
- ✓ 2<sup>nd</sup> 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

Backlog Item Count: 20 | Backlog Item Estimate (pts): 241.00 | Defect Count: 0

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

Total Estimate (pts): 241.00 | Target Estimate (pts): N/A | Available (pts): N/A

**Backlog Items / Defects**

Filter - | Sprint: (None)

Move to Sprint: -

Title

- AO - As a dealer, I would like to see a DMS Polling Report in AutoOffice so that I can figure out when a file was processed successfully
- DMS1 - As a Tech Supporter creating a new import, I would like all items set to "No", not take previously selected import settings
- DMS1 - As a Tech Supporter, I do not know the function of the Import ID field and would like it removed if it has no purpose
- DMS1 - As a Tech Supporter, I would like erroneous items in the Import Source dropdown removed
- DMS1 - As a Tech Supporter, I would like the Apply Auto Rules option

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**Sprint Tracking : : Bulldogs**

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

Project Path: KBB > HSS > CDM > Bulldogs

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
PP - Build Sep-Oct '08 KARPOWER CD Mary Open		Build data / Mary 12.00				To Do:12.00
DLW - Provide a payment and lease calculator in DL Web Steve In Progress		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 /	QA - Execute Tes /			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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