

## TEKSYSTEMS GLOBAL SERVICES CUSTOMER SUCCESS STORIES



training

### Client Profile

Industry: Financial Services

Revenue: More than \$94 billion

Employees: Approximately 282,000

Geographic Presence: Operates in all 50 states and across more than 40 countries; serves clients worldwide

## Supporting a U.S. Financial Company's Transition to Agile Through Training and Coaching

### QUICK FACTS

#### Objectives

- Support a companywide initiative to transition the client's development teams to Agile methodology
- Improve the quality of the client's code
- Decrease time to market of its products
- Increase productivity of its development teams

#### Challenges

- Improve communication and collaboration with key business stakeholders
- Develop unique training solutions to meet the needs of individual teams
- Build consistency around the roles, techniques, approach, practices and terminology across the client's product development teams

#### Implementation Highlights

- Provided custom instructor-led training, virtual instructor-led training and coaching solutions
- Offered real-time direction and feedback through coaching and mentoring
- Integrated products' business owners into client's development process

#### Technologies Supported

- DataStage
- Informatica
- Java
- Oracle
- Agile Toolsets: Jenkins, JIRA with GreenHopper, and Rally

#### Results

- Completed 15 Agile training/coaching engagements and 12 stand-alone Agile classes
- Sourced 16 high-quality instructors
- For example, helped one team mobilize a stalled project; the team went from a five-month requirements gathering process to having functioning software for 65 percent of the planned application within six weeks

## EXECUTIVE SUMMARY

A large U.S. financial services firm partnered with TEKsystems on training and coaching services to support its transition from Waterfall to Agile development methodology.

### Client Profile

The client, a large U.S. financial institution, serves individuals, businesses and large corporations by providing banking, investment and asset management services. Over the years, our client has increased revenue and market capitalization through process improvement, attention to customer service and satisfaction, product innovation and strategic acquisition. We've provided IT training and education services to the client since 2007.

### Project Overview

In order for companies to stay competitive, they need to be able to deliver better products, faster. Agile development methodology helps teams create more velocity, while increasing the quality of products and better aligning the products with customer demands and expectations. As such, the number of software development projects and products using Agile as their primary methodology has increased significantly in recent years. Organizations that implement Agile development processes can experience significant benefits, including speed to market, decreased defects (i.e., higher-quality code), productivity, customer satisfaction and business partner participation.

Agile draws on a philosophy that encourages significant involvement from both the technical and business owners of a product. For companies accustomed to Waterfall, this aspect of implementing Agile can be an organizational and cultural challenge. Many business teams are used to providing requirements to a technology team, waiting a period of time and then getting a product back based on the original requirements; business stakeholders take a hands-off approach while the technical team goes through the development process. However, requirements usually change from the time they're originally written, so the finished product—that took a long time to

create—may no longer meet the business's needs, leaving both sides frustrated. Conversely, Agile keeps both sides informed—the business side can communicate changes in requirements and priorities immediately and the technical side can set realistic expectations. Agile allows for technical teams to evolve and adapt the product throughout the development process based on the business's needs.

Navigating this change can be difficult, but effective training and coaching can help ease the transition. Education on how to implement business partner involvement can help the technical and business teams through the new communication processes in real time, pointing out to both sides how this collaboration ensures understanding, buy-in, productivity and inclusion.

### Situation

TEKsystems Training and Education Services supported the client on a number of projects related to Agile. This case study explores the client's problem, our recommended solution and results in terms of both our broader companywide outreach efforts as well as a specific project. The specific example highlighted in this case study is related to our Agile training for an individual team within the company.

### Companywide Initiative

In many organizations, the development team initiates a move to Agile; however, our client—an innovative leader in the financial industry—saw its initiative start at the leadership level. The company as a whole had been experiencing frustration with its development processes. Its products had a high level of defects and the IT team was asked to perform extensive rework due to changing business requirements. Additionally, business leaders were disappointed with a slow time to market and receiving products that no longer met

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Agile employs the expertise and vision of both the technology and business units to meet development objectives.

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the mark from a business perspective. Overall, there was a lack of involvement, communication and flexibility between the IT and business units, weakening trust and straining internal relationships.

The client had an overarching vision to improve the development and release of its internal and external applications through the adoption of Agile methodology. Agile employs the expertise and vision of both the technology and business units to meet development objectives. Leadership believed Agile would help make gains in productivity, increase the quality of its products and decrease time to market. The client also believed the move to Agile would build consistency around the roles, techniques, approach, practices and terminology across its product development teams. This would then enhance relationships between the technical teams and the business units they support, and increase overall internal and external customer satisfaction with its products. To show their commitment to this change, client leadership launched an enterprise-wide initiative to convert as many of its development projects from Waterfall to Agile methodology within two years.

### Team Example

Like many groups at the company, this division's development team was making the transition from Waterfall to Agile. The team had begun a development project to create an application to support upstream and downstream referrals to the division. However, after five months of working on the project and only completing a third version of a high-level requirements gathering for the

application, the client decided against working on a fourth version of the requirements and instead transitioned the development to an Agile methodology.

The project sponsor hoped that by using an Agile framework, work on the project would get started; success would be defined as creating a development environment—getting the project out of the analysis, planning and defining of requirements phase and into actual development and producing functional software as soon as possible. As the team set about this transition, they were seeking an education partner to train and coach their internal developers on Agile fundamentals and best practices.

## Solution

### Companywide Initiative

Our client has multiple development teams throughout the organization, so we would tailor our Agile training and coaching solutions to meet each team's needs. These objectives would be defined through an initial team or organization assessment, whether in the format of discovery calls, online surveys, in-person focus groups or on-site assessments of the team's current state, tools, processes, dynamics and more. We would also gather information on how they define success and uncover where their challenge areas were. Then, we would analyze and compile these results and use the information to build and recommend a customized program that would meet the goals they've set.

Most engagements would use a blended learning approach, using a mix of instructor-led training, coaching and mentoring over an extended period of time. During the foundational instructor-led training (i.e., Agile Team Training Camp), the trainer would assess the team's current state, uncover new requirements, shore up his or her approach, build a trusting relationship within the team, provide ad hoc training, define and assign roles, and get the team started down the road to Agile.

During the next phase, sprint coaching, the coach would work with the team on the first few sprints.

## Supporting a U.S. Financial Company's Transition to Agile Through Training and Coaching

He or she would sit on the team and provide real-time direction and feedback; help set up processes and practices based on observation and objectives; and start building a solid foundation and sustainable habits. Coaching would involve hands-on group discussions, training and mentoring focused on improving Agile understanding, practical application, collaboration, productivity, quality and team dynamics. Additional ongoing coaching could also introduce new concepts and advanced techniques where necessary. Oftentimes coaches perform focused coaching for ScrumMasters and/or "train-the-trainer" to develop coaches within the team to sustain the adoption and ensure adherence to the new practices and processes following the coach's departure.

We would also involve the business partners who utilize the products in their daily tasks to ensure constant communication of requirements, including changes and new ideas. The technical team would know of the changes immediately and could set realistic expectations, and the business partners could prioritize requirements and confirm that they're getting what they need throughout the process—not wait until the product was finalized. Coaches would work through this scenario, showing the benefits of how the business partner involvement contributes almost immediately to a better product for the end user. This would be demonstrated through the routine and daily tasks of an Agile team, and coaches could point this out in real time, showing the successes as they happen.

### Team Example

For this engagement, we would provide three days of instructor-led foundational training. This training would lay the groundwork for Agile: what it is, why the transition is happening, and its benefits and different roles, compared to Waterfall and other development processes.

Following that, our coach would stay on site for 10 weeks and offer hands-on coaching and lead the team through its initial sprints. We would bring together the roadmap and backlog. We would help them through what they would do in each sprint—how to plan, develop and perform quality assurance

(QA) using Agile. We would track progress using JIRA and project burn down charts.

## Results

### Companywide Initiative

TEKsystems began providing training and education services for the client in 2007 and began focusing on Agile methodology education in mid-2012. The client chose to partner with TEKsystems to support its Agile transition because of our past performance at the client, our position as a vetted and trusted services partner, and our stability and network of instructors and coaches. Most importantly, they knew of our commitment to taking the time to meet with each team's key technical and business stakeholders, understanding their unique challenges, selecting the tools and processes that will work best for them, and adapting willingly as the project progresses.

Thus far at the client, we've participated in 15 Agile training/coaching engagements and delivered 12 stand-alone Agile classes with collaboration from 16 high-quality TEKsystems instructors. In addition to traditional instructor-led training and coaching, we've also incorporated virtual instructor-led training. Each development team has different functions, needs and people; therefore, we custom-fit solutions to fit each specific team.

### Team Example

Our 10-week engagement included three days of instructor-led training followed by hands-on coaching through the first few sprints. Prior to Agile implementation, the team did not have a development environment; they were getting stuck in analysis, planning and defining requirements—taking months to gather requirements and not producing any functional software. Using JIRA as the tool to track requirements for each sprint, we created a product backlog to support up to three sprints of technical and business stories by the end of Sprint 0. The team was able to have a functioning application by Sprint 3; and within six weeks, they had functioning software for 65 percent of the planned application. By Sprint 12, they had encountered only three defects, a significant

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decrease compared to a similar non-Agile development project that had encountered 1,000 defects within the same timeframe.

TEKsystems trained the team on Agile best practices and procedures. Our training helped improve the effectiveness and efficiency of product development by prioritizing backlogs based on business value; understanding how to decompose stories and backlog; planning sprints and releases; and understanding and applying proper estimation, planning, testing and defect management. We also worked with them to identify key design issues quickly and address them in current and future sprints as practice. We employed observational and empirical assessment techniques to track overall performance and identify areas of improvement. The development team and product owners now understand how to implement, practice and improve critical Agile practices.

The client experienced significant improvements in team building as well, bringing increased clarity around roles and responsibilities and collectively developing norms and operating principles. The team came to understand the value of transparency, communication, team effort, and the need to adopt proper Agile practices and processes effectively and gain wisdom from their lessons learned. The client's newfound strategies ensured effective and clear team, customer and stakeholder conversations happened on a consistent basis.

## Key Success Factors

- **Partnership.** When the company decided to make the move to Agile, they turned to TEKsystems, a long-time partner, because we were very familiar with their environment and the fact that they have several development teams throughout the organization. They knew they could rely on us to deliver and customize solutions per each team's individual needs.
- **Leadership support.** Since the client had a companywide initiative and executive support to transition more of its development projects to Agile, teams were very invested in training and coaching so they could better learn the fundamentals, adopt best practices and sustain the process following the engagement.
- **Flexibility.** We are tool-agnostic; we worked with each team to define success up front and tailored our training and coaching approach to deliver on those results.

## ABOUT TEKSYSTEMS®

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People are at the heart of every successful business initiative. At TEKsystems, we understand people. Every year we deploy over 80,000 IT professionals at 6,000 client sites across North America, Europe and Asia. Our deep insights into IT human capital management enable us to help our clients achieve their business goals—while optimizing their IT workforce strategies. We provide IT staffing solutions, IT talent management expertise and IT services to help our clients plan, build and run their critical business initiatives. Through our range of quality-focused delivery models, we meet our clients where they are, and take them where they want to go, the way they want to get there.

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