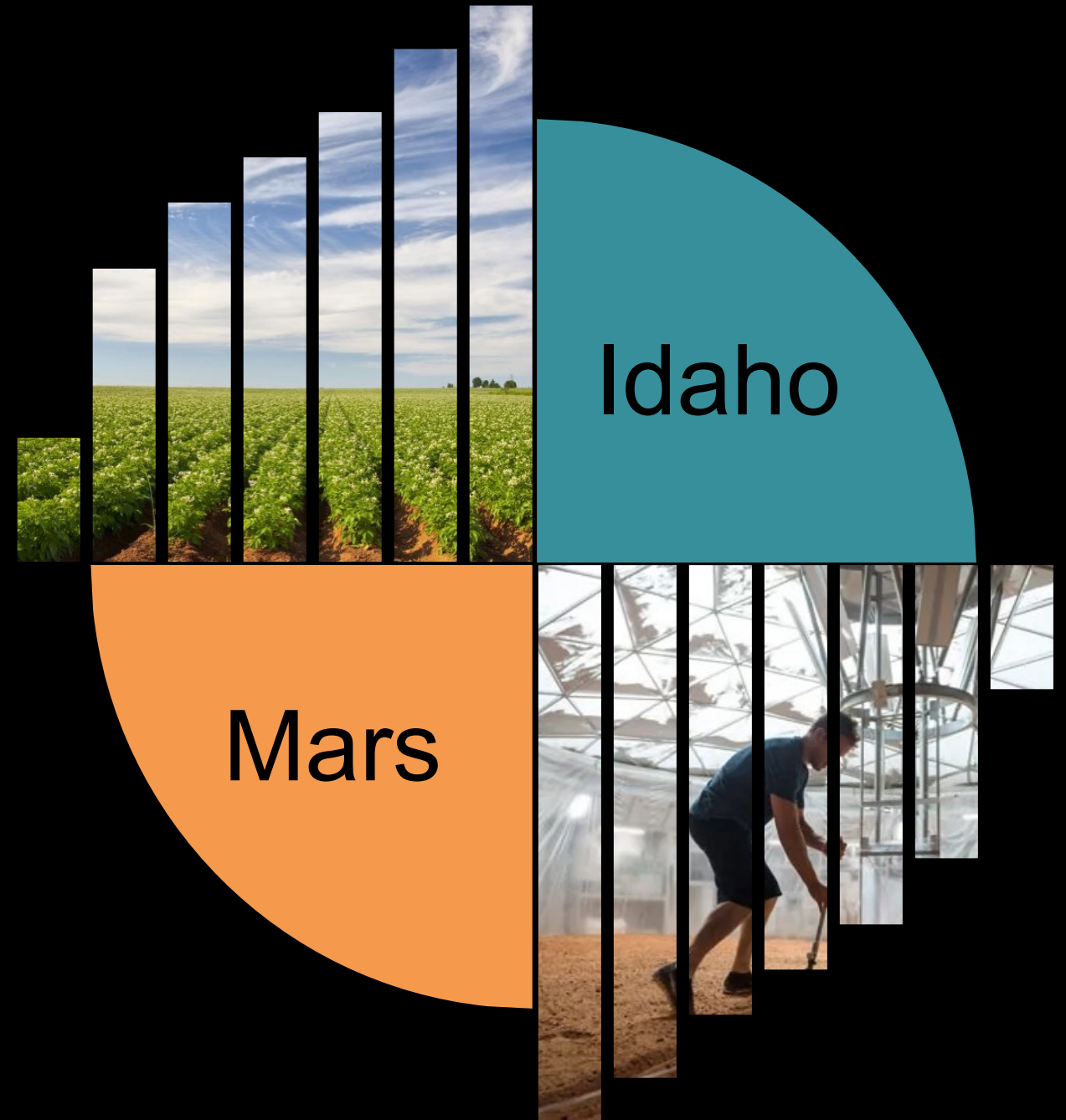# Growing a Potato on Mars

A Kanban Maturity Journey at JPMorgan Chase

Abigayle Wall (Agility Leader/ Coach)

Dharmesh Chavda (Head of Software Engineering)

Kanban may work,
but I have unique challenges
here...

Technology Complexity

- System of record for JP Morgan Chase merchant credit card processing business (over 600K customers)
- Onboarding 35K customer yearly
- 3k data fields per customer
- Over 10k complex business rules in a customized application

Team Expansion

100% growth in 3 Months

Kanban did work... and gave us tools that we didn't have before...
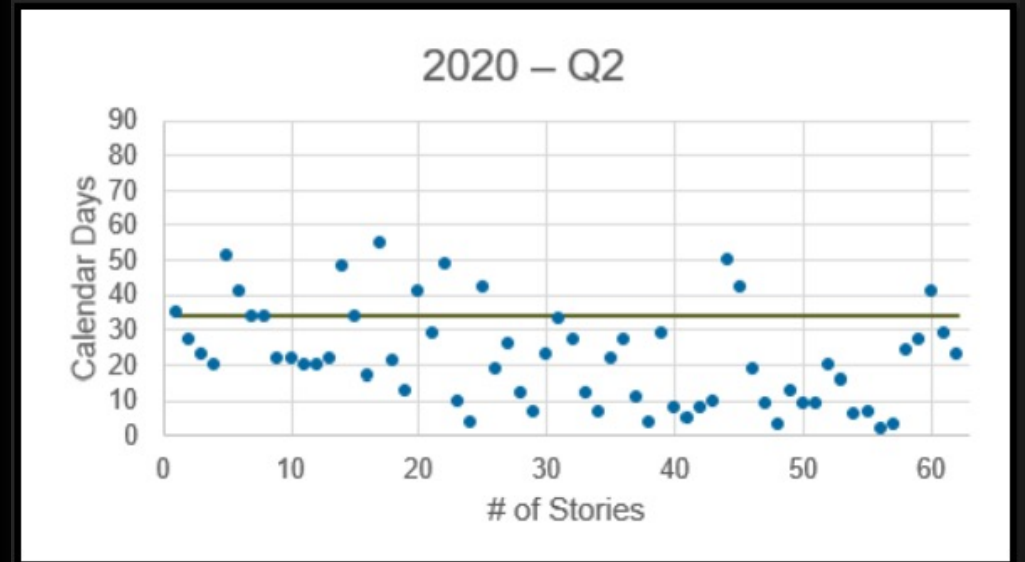
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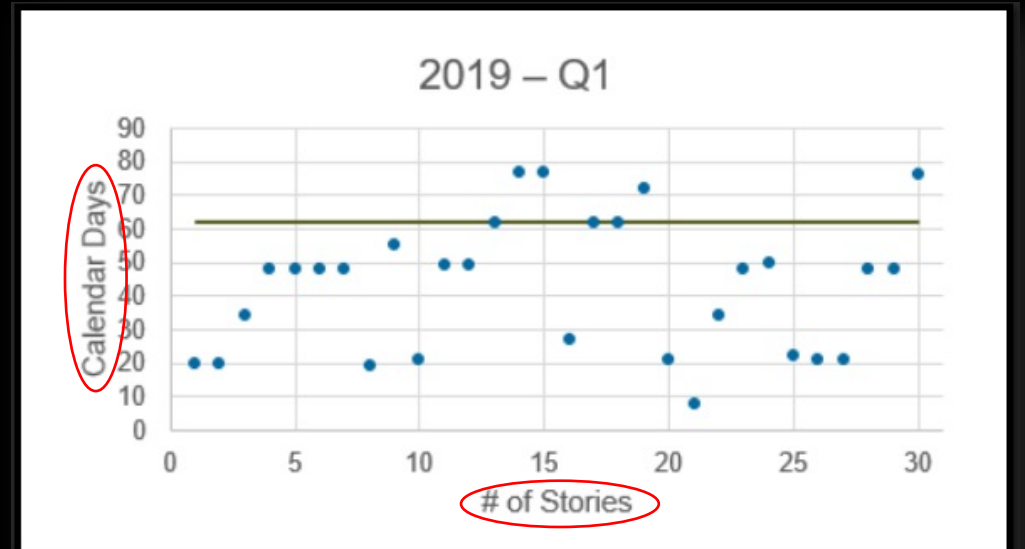
Output of the portfolio double while the number of teams was reduced

The 80th percentile for cycle time was cut in half.

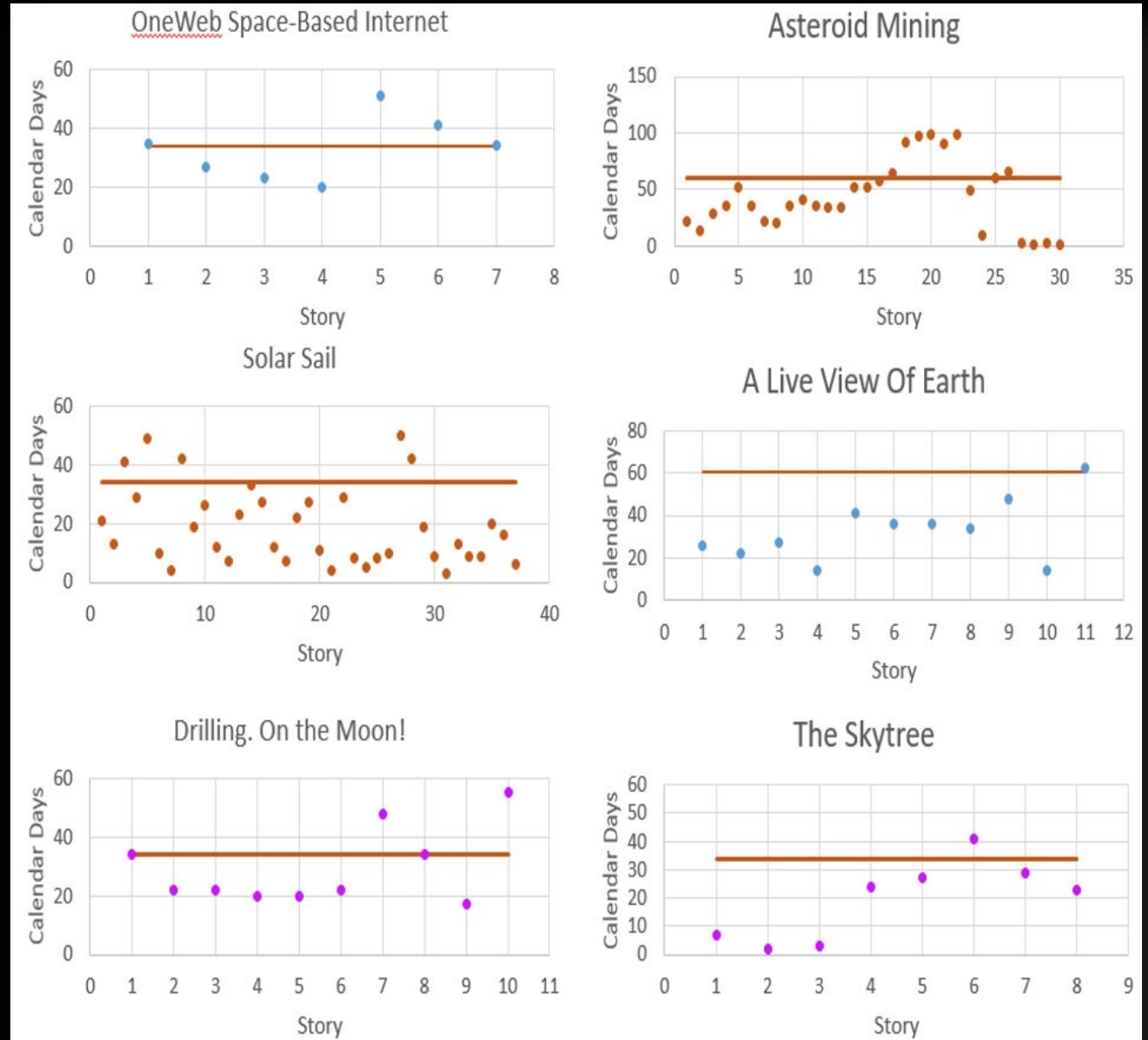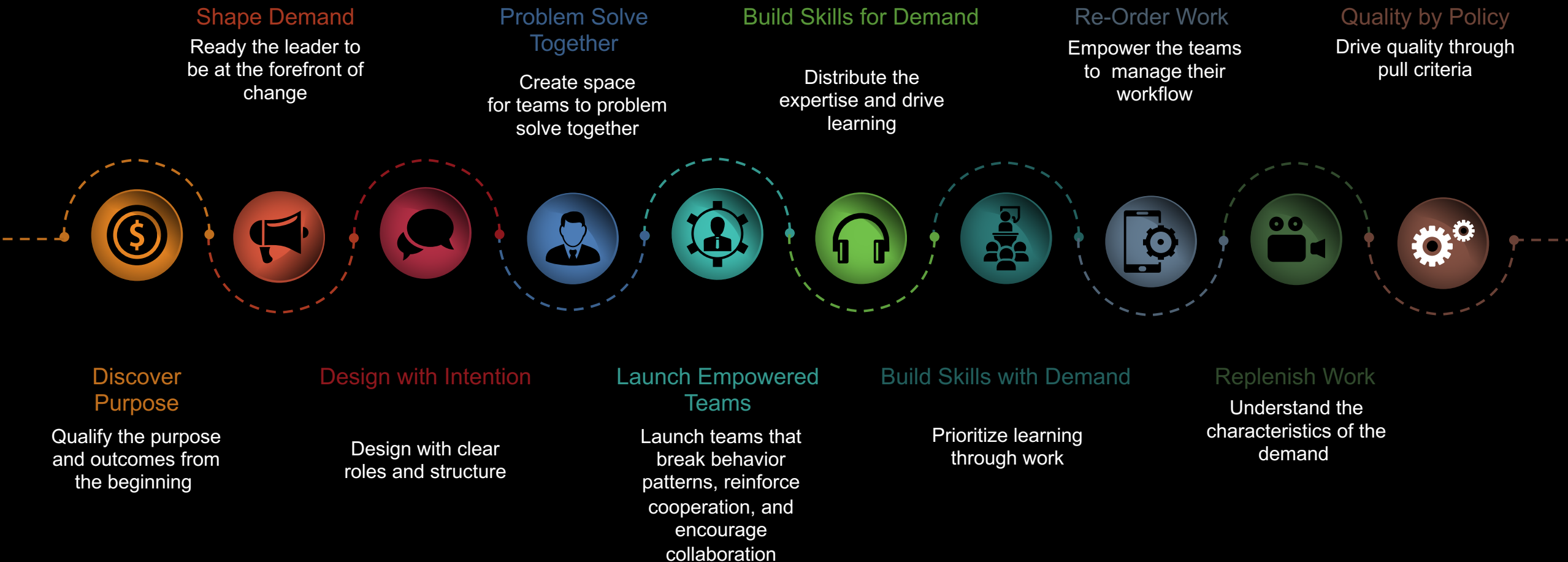# Kanban did work... and gave us tools that we didn't have before...

Identify project/initiatives that created drag on Cycle Time

Prevent upstream issues from trickling into teams

Shape Demand
Ready the leader to be at the forefront of change

Problem Solve Together
Create space for teams to problem solve together

Build Skills for Demand
Distribute the expertise and drive learning

Re-Order Work
Empower the teams to manage their workflow

Quality by Policy
Drive quality through pull criteria

Discover Purpose
Qualify the purpose and outcomes from the beginning

Design with Intention
Design with clear roles and structure

Launch Empowered Teams
Launch teams that break behavior patterns, reinforce cooperation, and encourage collaboration

Build Skills with Demand
Prioritize learning through work

Replenish Work
Understand the characteristics of the demand

Our 10 Tips for Transformation Success

Discover Purpose

What I meant?

- I don't have enough expertise in the teams.
- The teams are growing too fast to train them like we do now.
- I need something to improve the volume and speed of delivery.

What I said?

We need to reorganize the teams.

Leaders often approach with a preconceived solution to their problems.

What I found?

- Conflicts of interest in the roles
- Minimal coordination between the teams
- Skill silos
- Varying predictability and output
- Conflicting priorities from multiple managers

|	
1	Commitment by Change Agent to own and drive transformation within his/her own organization
2	Change Agent to gain buy-in and full commitment with Product & Operations to engage and support transformation activities
3	Change Agent to secure a named Backlog Owner(s) and Team Leader(s) committed to attending all training and IPBR workshops and remain actively engaged with during and after transformation
4	Design Transformation Strategy for CMS PeopleSoft Boarding Engine • Organization Design • Training plan • Transformation events schedule
5	Location strategy – plan describing how candidate teams targeted for transformation will be co-located
6	Commitment by Change Agent, named Backlog Owner(s), Team Leader(s) and team to transform to a pull-based model of software delivery
7	Commitment to allow all team members to attend all required training (Core Scrum, Kanban, Initial Product Backlog Refinement, etc.) while minimizing impacts to ongoing deliveries.
8	Team education (Core Scrum, Kanban, IPBR, etc.)
9	Opt-in / Opt-out offering to candidate team members prior to self-team formation
10	Self-Formation of Feature Teams / Team Identity / DoR, DoD, Undone
11	Selection of Scrum Masters/Team Leader to support formed self-organizing teams
12	Local coaching support of first 2 sprints

Coaches alone are unable to install solutions

Teams Need a Strategy to Sustain Change without a Coach

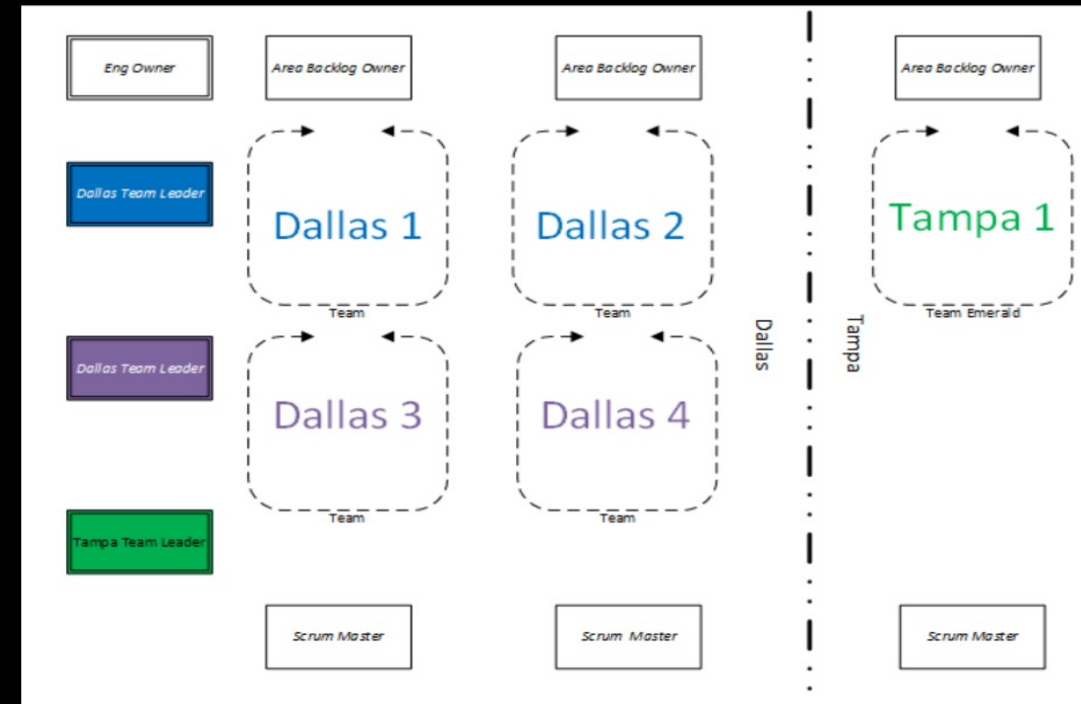Readiness Criteria Protects the Leader, Team and Coach from Failed Transformation

Shape Demand

Design with Intention
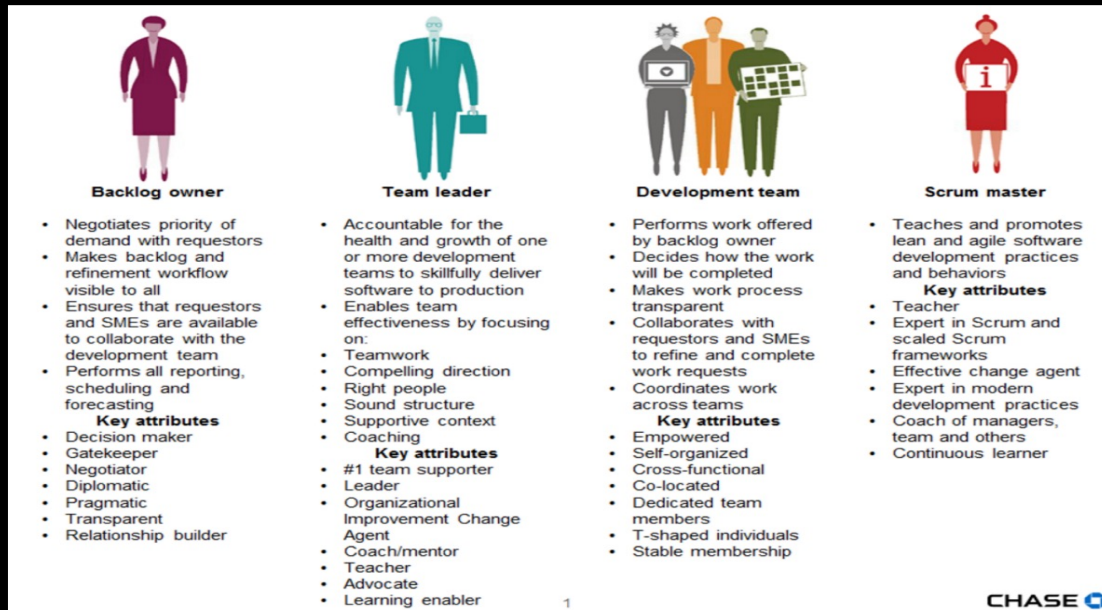
Design Structure:
Put the effort of the leader and coach into a quality design and launch for the teams

Define Roles:
Make everyone's responsibilities clear

Backlog owner
- Negotiates priority of demand with requestors
- Makes backlog and refinement workflow visible to all
- Ensures that requestors and SMEs are available to collaborate with the development team
- Performs all reporting, scheduling and forecasting

Key attributes
- Decision maker
- Gatekeeper
- Negotiator
- Diplomatic
- Pragmatic
- Transparent
- Relationship builder

Team leader
- Accountable for the health and growth of one or more development teams to skillfully deliver software to production
- Enables team effectiveness by focusing on:
- Teamwork
- Compelling direction
- Right people
- Sound structure
- Supportive context
- Coaching

Key attributes
- #1 team supporter
- Leader
- Organizational Improvement Change Agent
- Coach/mentor
- Teacher
- Advocate
- Learning enabler

Development team
- Performs work offered by backlog owner
- Decides how the work will be completed
- Makes work process transparent
- Collaborates with requestors and SMEs to refine and complete work requests
- Coordinates work across teams

Key attributes
- Empowered
- Self-organized
- Cross-functional
- Co-located
- Dedicated team members
- T-shaped individuals
- Stable membership

Scrum master
- Teaches and promotes lean and agile software development practices and behaviors

Key attributes
- Teacher
- Expert in Scrum and scaled Scrum frameworks
- Effective change agent
- Expert in modern development practices
- Coach of managers, team and others
- Continuous learner

CHASE

1

Eng Owner | Area Backlog Owner | Area Backlog Owner | Area Backlog Owner

Dallas Team Leader — Dallas 1 | Dallas 2 | Tampa 1 (Team Emerald)

Dallas Team Leader — Dallas 3 | Dallas 4

Tampa Team Leader

Dallas | Tampa

Scrum Master | Scrum Master | Scrum Master

"Anti-Agile Meeting"

Meeting for the leader and the coach to challenge each other to say what was really on their minds without worrying about terminology.

Feedback

Groups that haven't worked together need tension points to bond and solve together.

Feedback loop at the hub Retrospective

Feedback loop to get the teams, team leaders, and the backlog owners talking about where they weren't working so well together.

Problem Solve Together

Launch Empowered Teams

Team Self Selection

Empowering engineers to select their own teams

Job Security not Role

Promise to help them find different job if they didn't want to work in the model.

Team Selecting Managers

Empowering team to select their manager
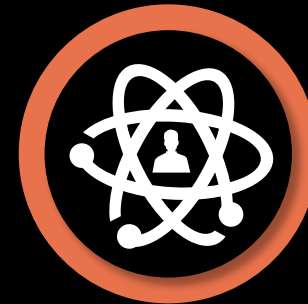
Team Selecting Scrum Masters

Empowering Team to select their Scrum Master

Training

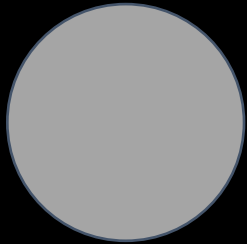Educate the group on agility and communication
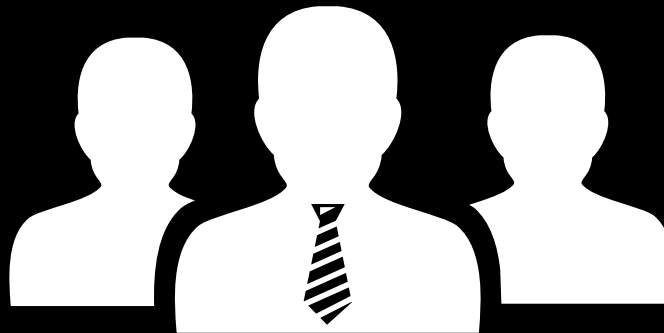
Build Skills

For The Demand

- Learning Sessions
- Visualize the expertise

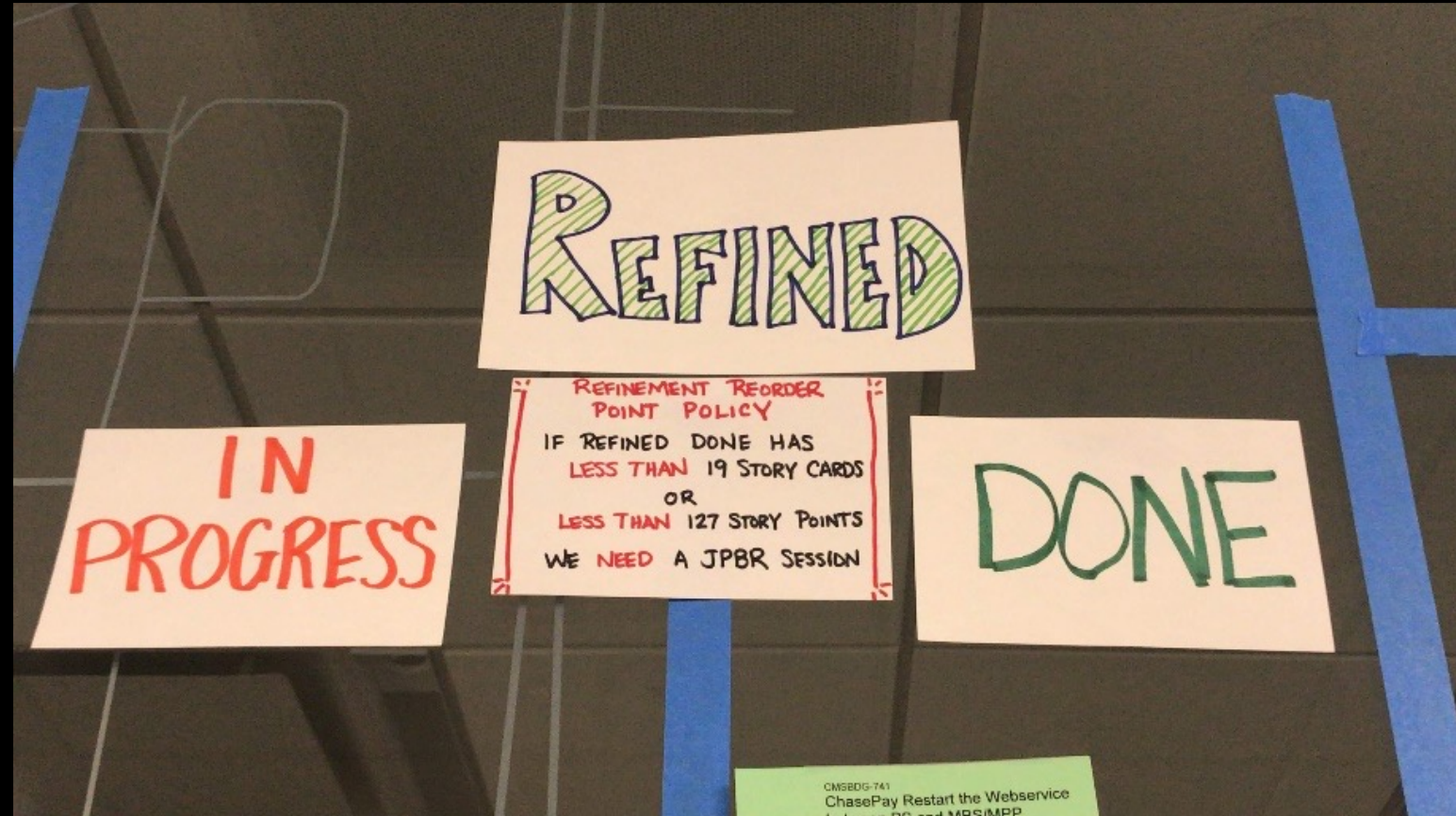**With the Demand**

- Planning Policies

Re-Order Work

Learning and planning created queue for Senior Developers and managers' time

A reorder point was implemented to give the backlog owners permission to cancel a planning session when there was enough ready work for the teams.

REFINED

IN PROGRESS

REFINEMENT REORDER POINT POLICY
IF REFINED DONE HAS
LESS THAN 19 STORY CARDS
OR
LESS THAN 127 STORY POINTS
WE NEED A JPBR SESSION

DONE

CMSBDG-741
ChasePay Restart the Webservice

Replenish Work

There were sprints where the team seemed to flow work and the cycle time was very quick and then there were times when flow and the cycle times slowed.
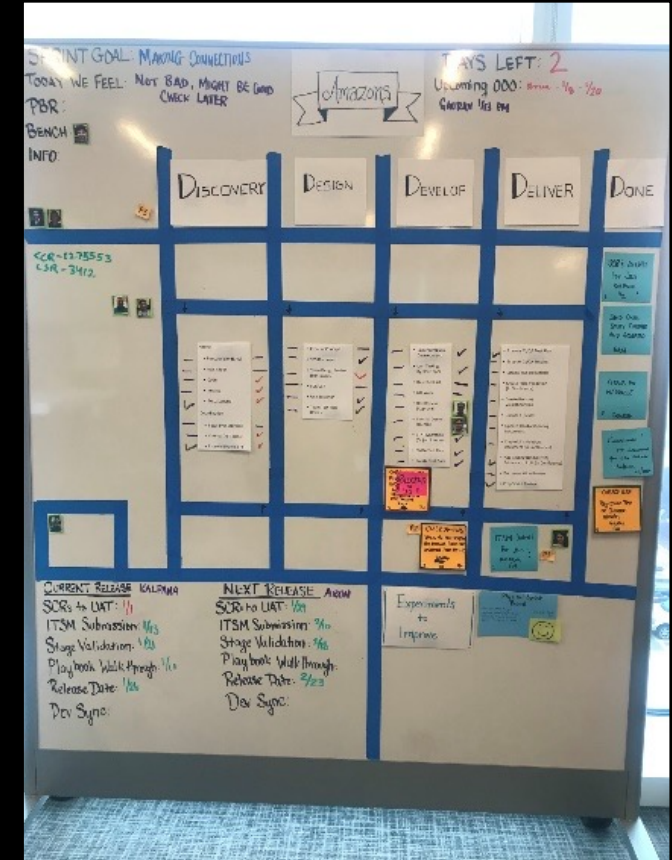
What was the issue?

- Work type category like Automation, Tech Debts and project work had different cycle time
- Unmanaged dependencies would slow down cycle times
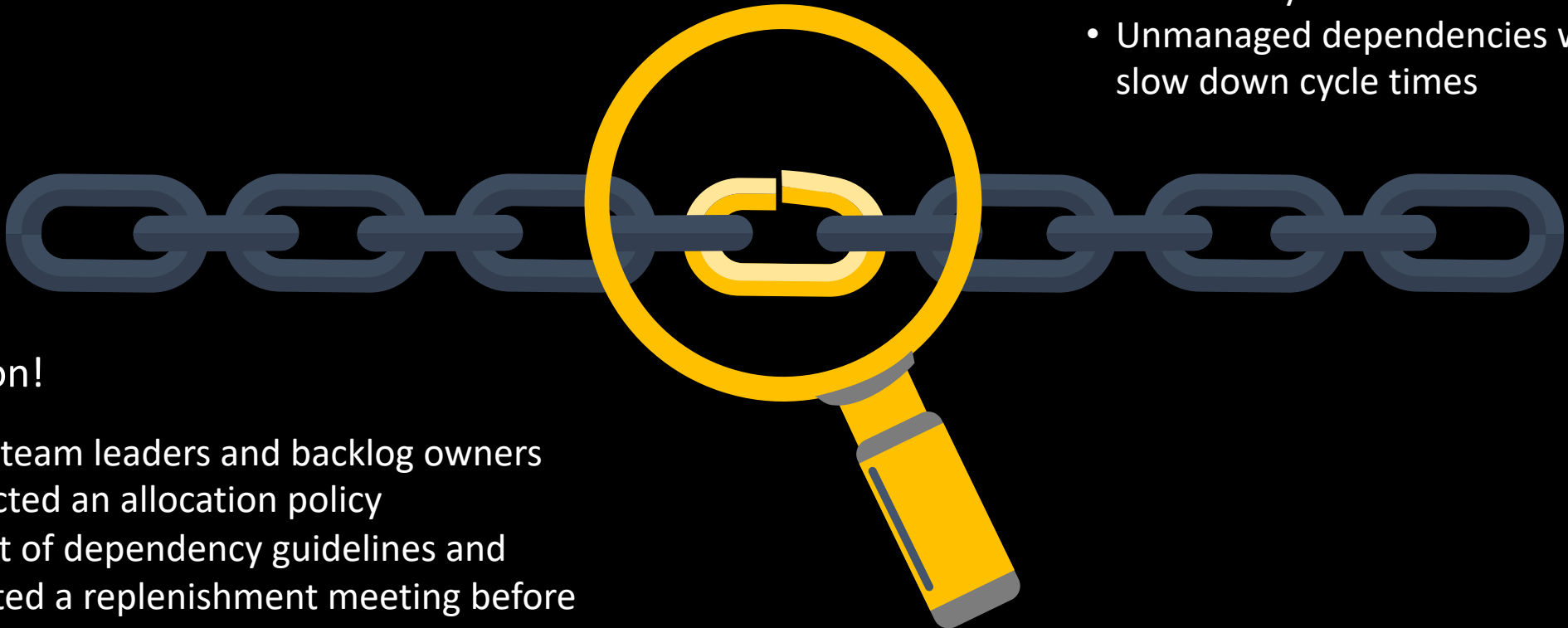
Solution!

- The team leaders and backlog owners enacted an allocation policy
- A set of dependency guidelines and started a replenishment meeting before the team planning meeting.

Quality by Policy

The portfolio was not immune to quality issues and with so many working on different aspects of the product for the first-time, quality had an initial downturn.

Evolution of the Board

Product Followed Our Lead

Abigayle Wall
ORSC Trained Coach for Teams, Products and Organizations

Q & A

Dharmesh Chavda
Head of Funding and Reconciliation
Technologies at JPMorgan Chase | Domain Ex...