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## Business Agility Successful Patterns

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May 28<sup>th</sup> 2021



# Introduction

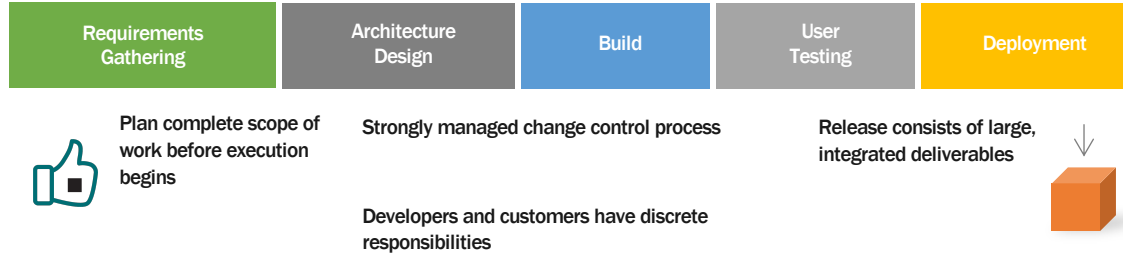


Omar Velasco  
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- Oversee Agile Practices at UST
- Over 15 years as an Agillist
- Recovered EPMO Director
- Trained and coached hundreds of teams in US, LATAM, Europe and Asia
- Lead Enterprise Agile Transformations for JP Morgan, Morgan Stanley, Chase Banking, Merrill Lynch, Bloomberg, Wells Fargo, TracIntermodal, smartShift Technologies, Bridgewater Associates
- Lead LeanStartup rollout for Technology and Compliance startups

# Change From:

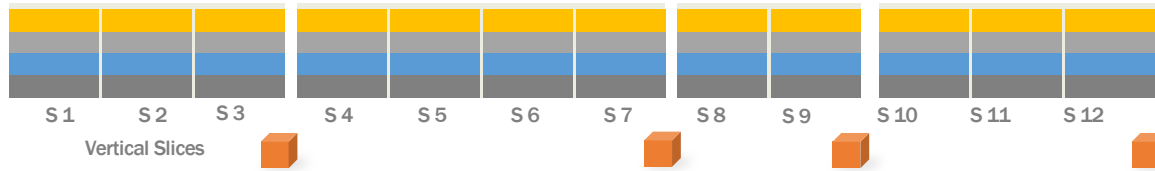
## Traditional



- Streamline approach based on contracts
- Process oriented
- Compressive documentation
- Rigid change management process
- Follow a plan

# Change To:

## Agile



Dynamic and empirical process control – plan small amount of work, then use experience to plan future components

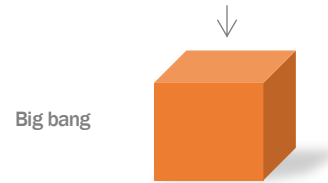
- Problems identified earlier – lower cost / pain to fix
- Open to changes at any point, as prioritized by customers
- Feedback throughout for mid-course correction

- Developers and customers collaborate throughout
- Good news delivered early; bad news delivered earlier

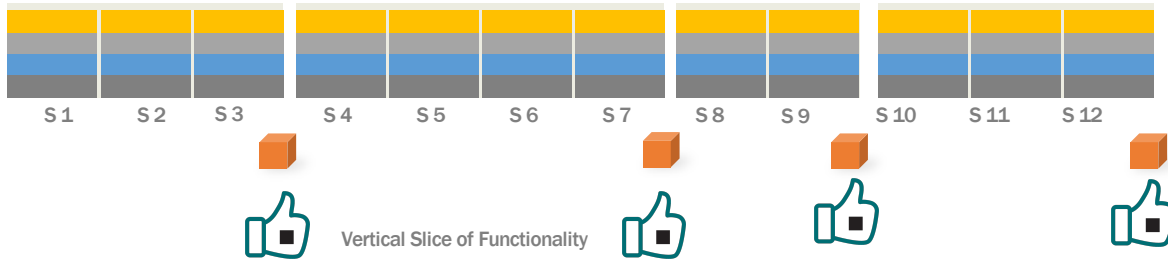
- Deliver highest business value
- Daily collaboration with business users
- Cross-functional teams
- Collocated
- Adapt to changes
- Quality Oriented

# Change

## Traditional

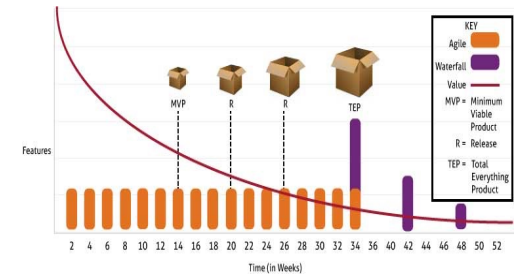


## Agile



## Agile

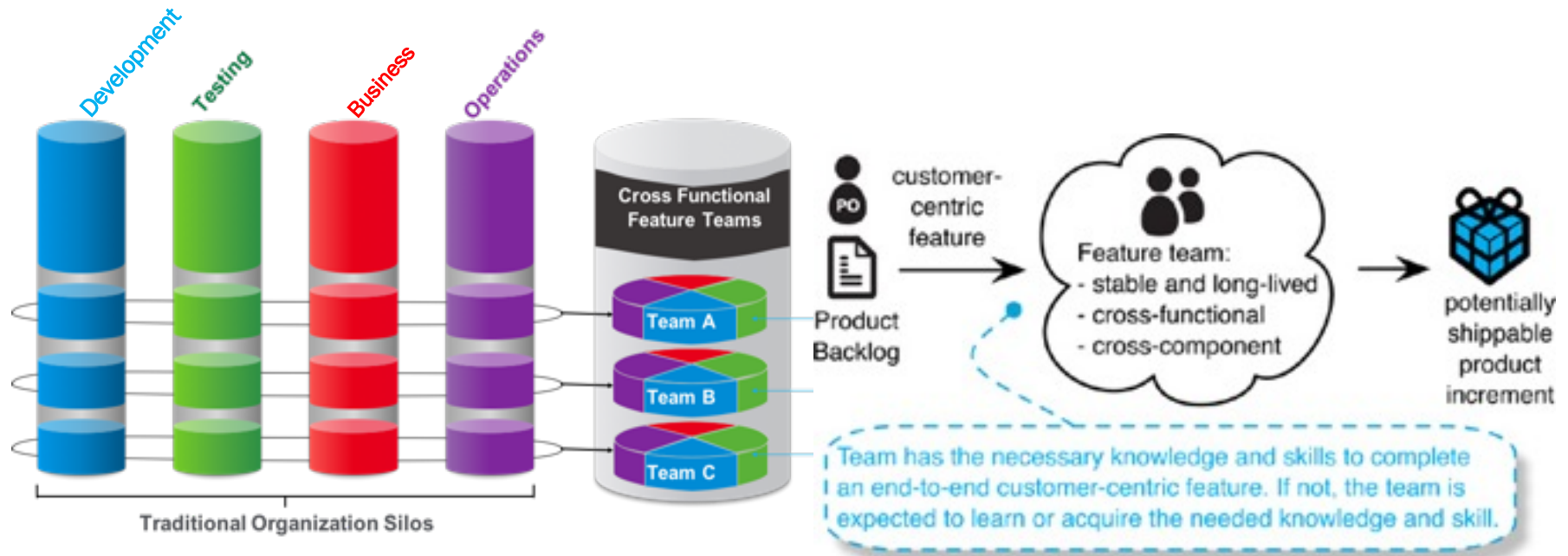
- Software value diminishes over time
- Business owners review working software every two weeks to ensure product viability
- MVP is released to the client as soon as possible to start the client feedback loop
- Continuous delivery ensures that the business and client needs are met on a timely basis



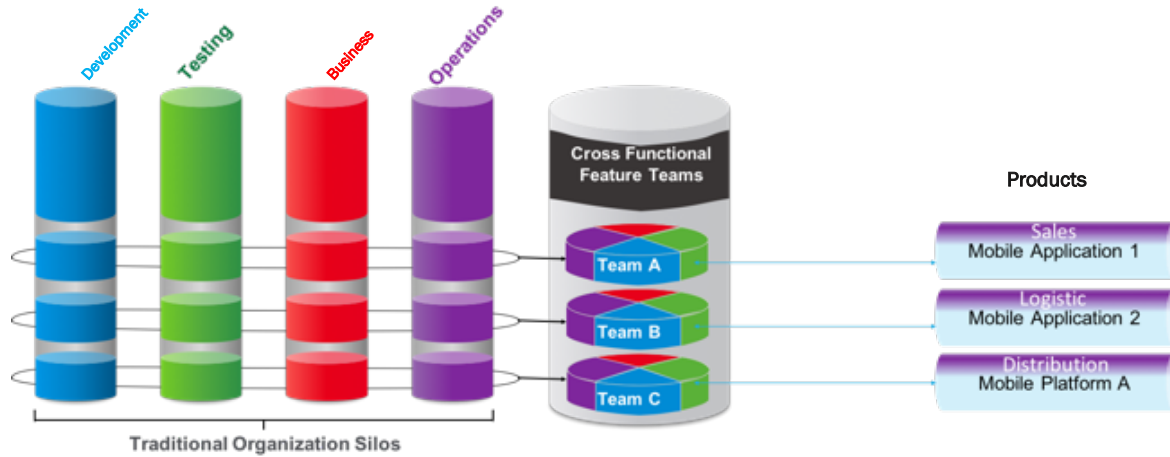
# Traditional Model - Silos of Specialization



# New Model – Cross Functional



# Product Alignment

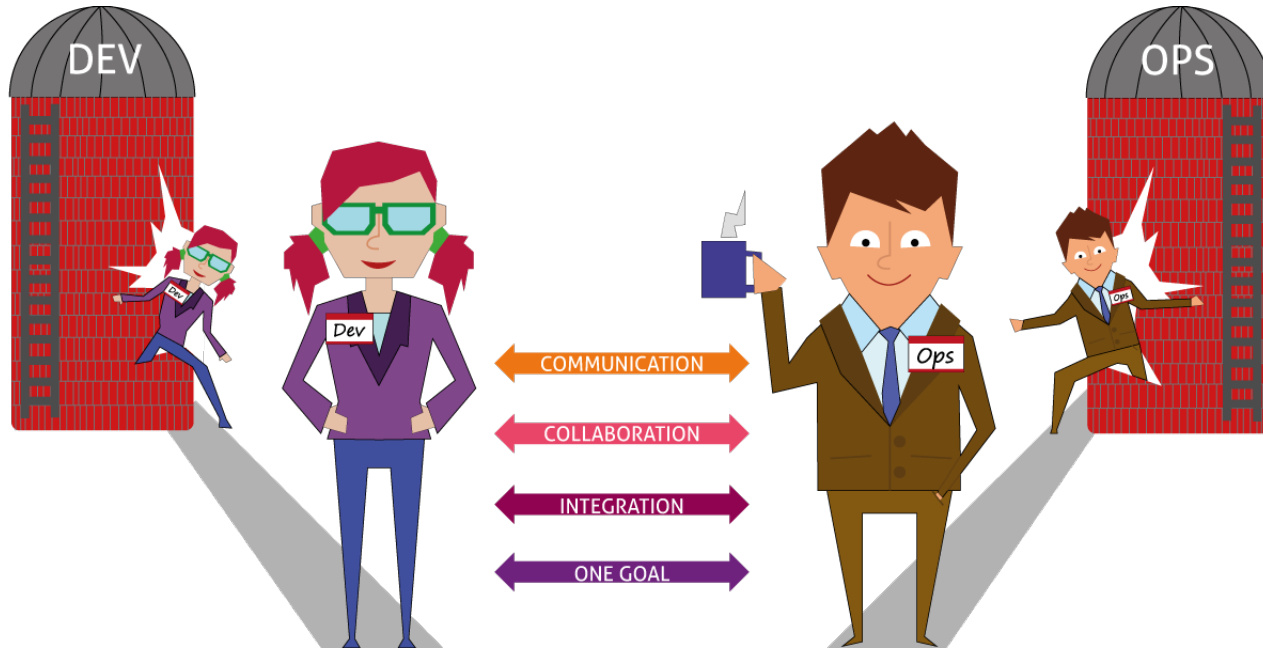


- Teams aligned to products, services or feature sets
- Cross-functional teams
- Components team exist to provide with shared services, components or patterns
- Project Portfolio vs Product Portfolio
- Project Budgeting vs Product Budgeting
- Business decides on priorities



# Breaking out of Silos

A successful Agile practice breaks down the silos typically placed around Development and Operations groups in order to bring Dev and Ops into a single team with a single goal: to deliver value to our customers.



# Why going Agile

Companies have different reasons to make radical changes to their operating models.

Understanding the reasons driving the change, helps define a metrics driven and customized transformation roadmap

## Competitiveness

- Align business & IT into an effective partnership
- Improve concept-to-cash cycle time
- Increase market share



## Revenue/profit

- Implement a new product or service model
- Improve return-on-investment for products, projects & programs



## Cost containment

- Reduce TCO development & maintenance costs
- Improve cost predictability
- Shift allocation among cost categories



## Customer satisfaction

- Improve product quality
- Improve satisfaction-of-need
- Manage demand proactively



## Operational excellence

- Develop effective, reproducible process
- Improve development capacity & flexibility
- Improve process visibility and manageability



Where you need to go determines which road(s) you need to take!

# Why Agile adoption fails?



## Lack of Executive Sponsorship

- Securing top' level support for the Coaching is essential!

## Absence of an Agile Framework

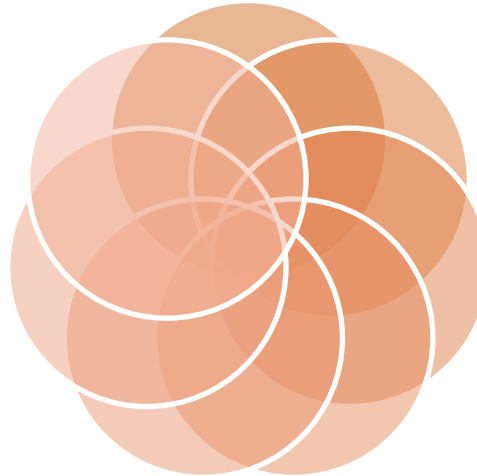
- Develop a Lean-Agile Framework based on SAFe but adapted to the special needs of BBC

## Poor Collaboration

- Support the organizational redesign of the team in support of value streams. Taken into consideration physical proximity, team work and mindset shift

## Inadequate Experience with Agile

- Bring the right coaching talent and support the creation of BBC internal talent to support a multi-year journey that will rely on a continuous improvement and ongoing exploration



## Lack of Business Participation

- Emphasize Business empowerment and align Business & IT to ensure the collaboration critical for success

## Lack of Clarity-of-Purpose

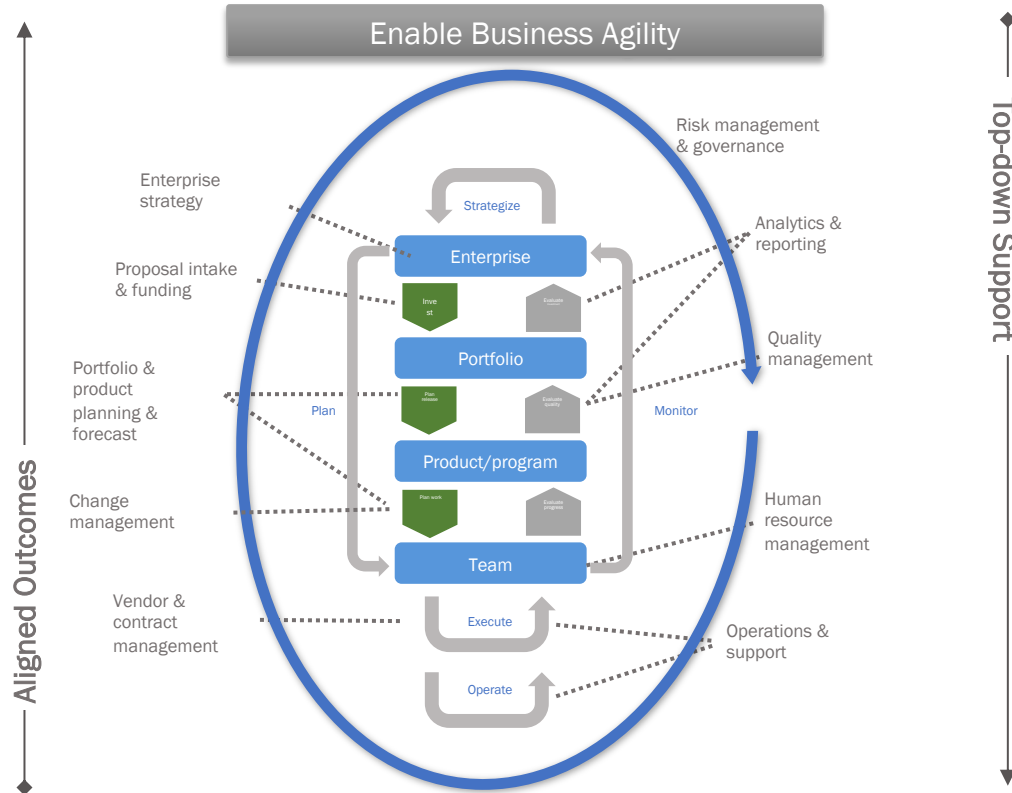
- Involve, educate and communicate regularly to everyone involved as a participant or beneficiary of the Coaching about Coaching strategic, tactical and operational goals, plans and progress

## Reliance in Legacy Structures & Operation

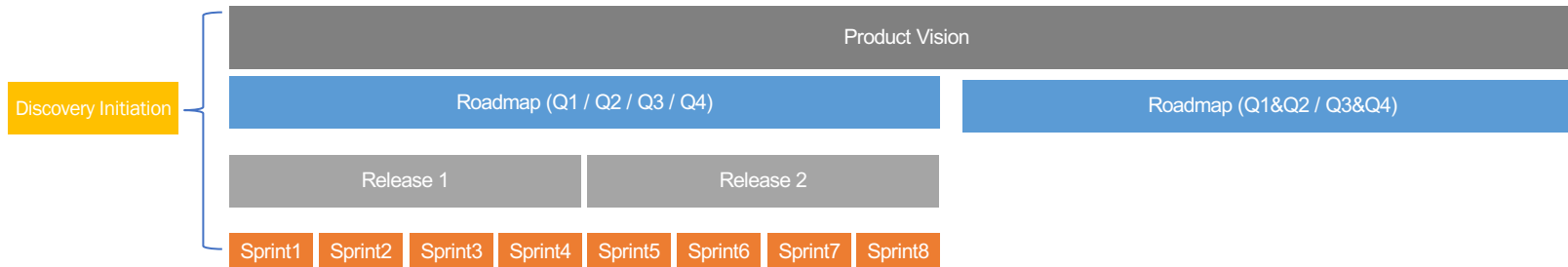
- Adopt OCM to enable lasting cultural change. Work with HR to align new roles and responsibilities

# Business Agility across the enterprise

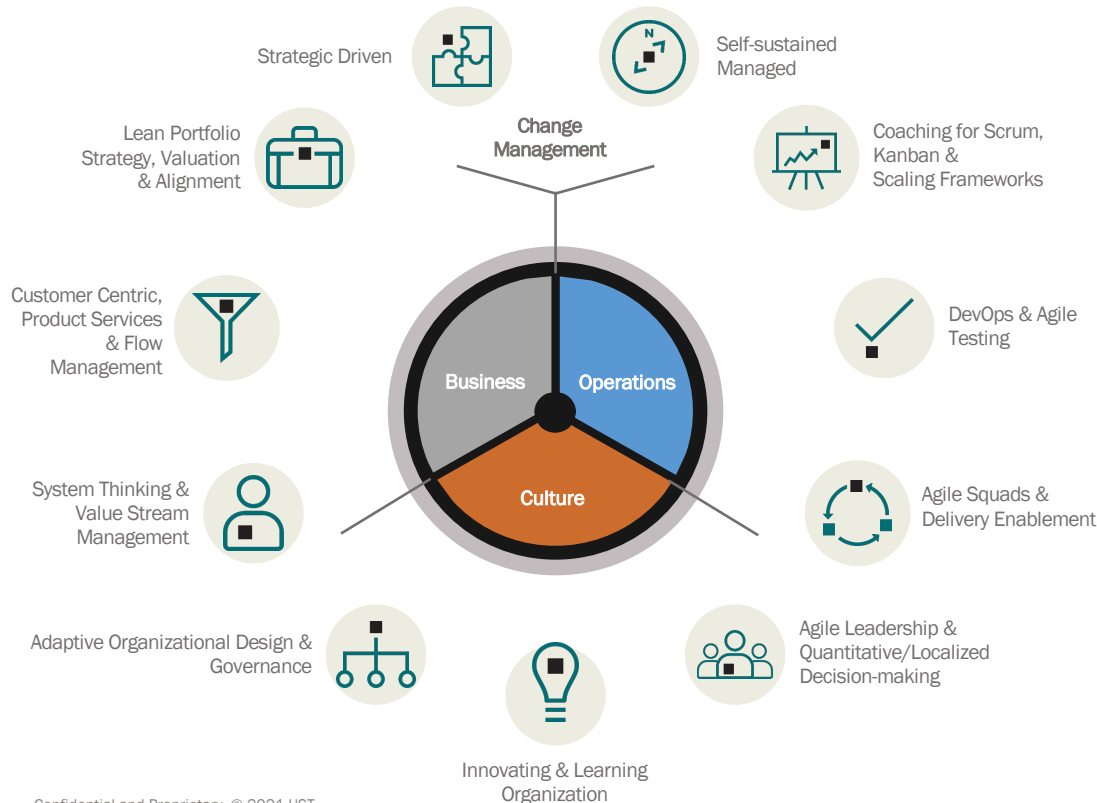
We work at different levels or across the whole enterprise. We are experts in all major agile methods and scaling frameworks and we use this expertise to customize the solutions that best fit our client goals



# Set a Goal



# Agile Transformation Blueprint that integrates Operations, Business and Culture

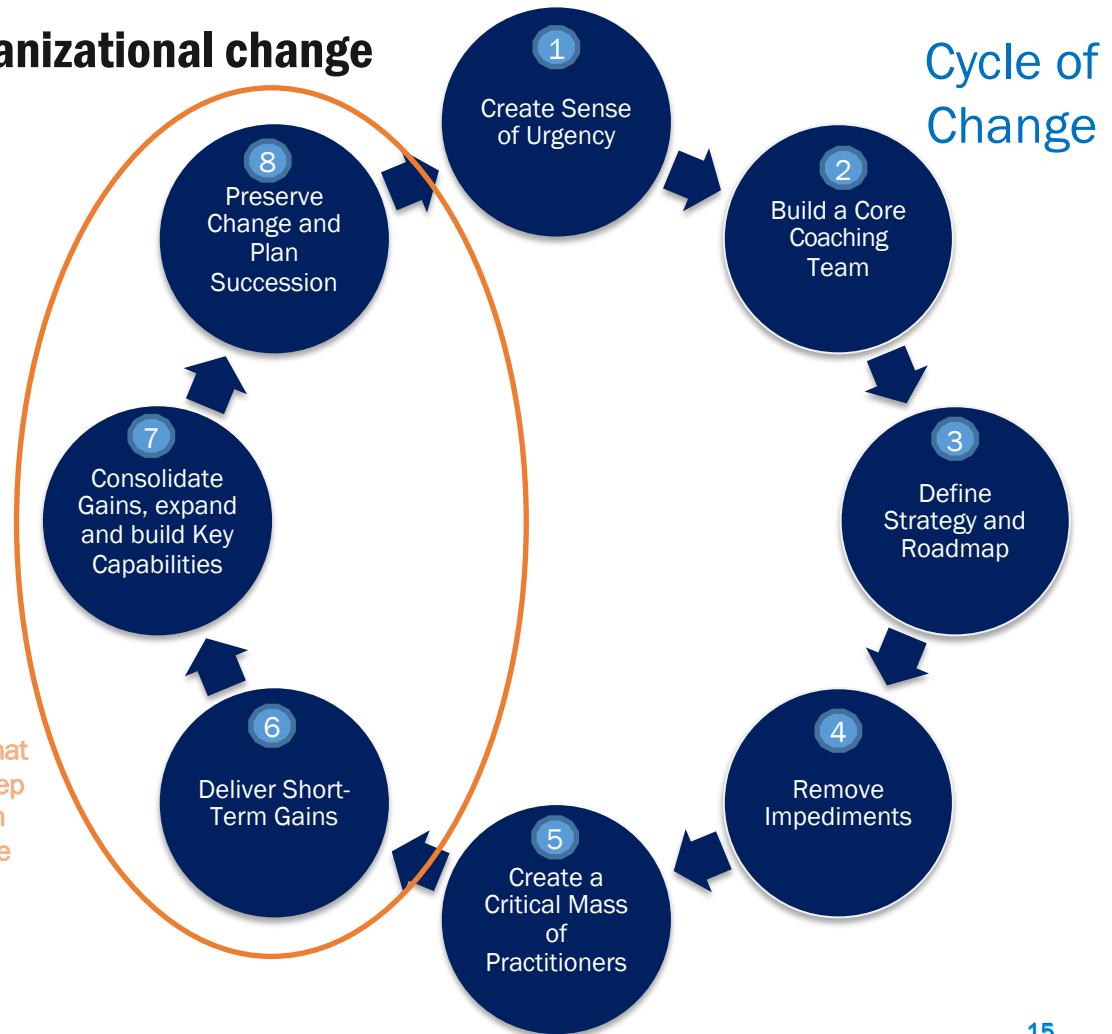


- UST holistic enables business Agility
- Agility is more than just Scrum or Kanban, is more...
- Is rooted on Agile **Principles** and **Values**
- Business Agility is **empirical** and is achieved through a **continuous exploration** of agile methods, organizational design techniques such as, DevOps, design thinking, change management, LeanUX, agile management, scaling, etc.
- UST **Agile coaches leverage** this integrated framework to customized solutions for our clients

# Lay foundations for cultural and organizational change

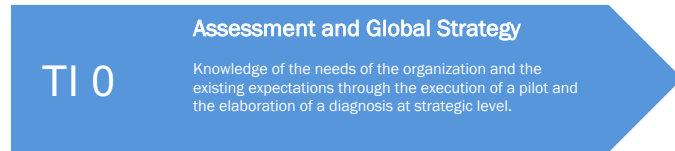
- 70% Fail
- 30 Success

Transformations that jump directly to step 6 and go through steps 6-8 just one time very rarely succeed.



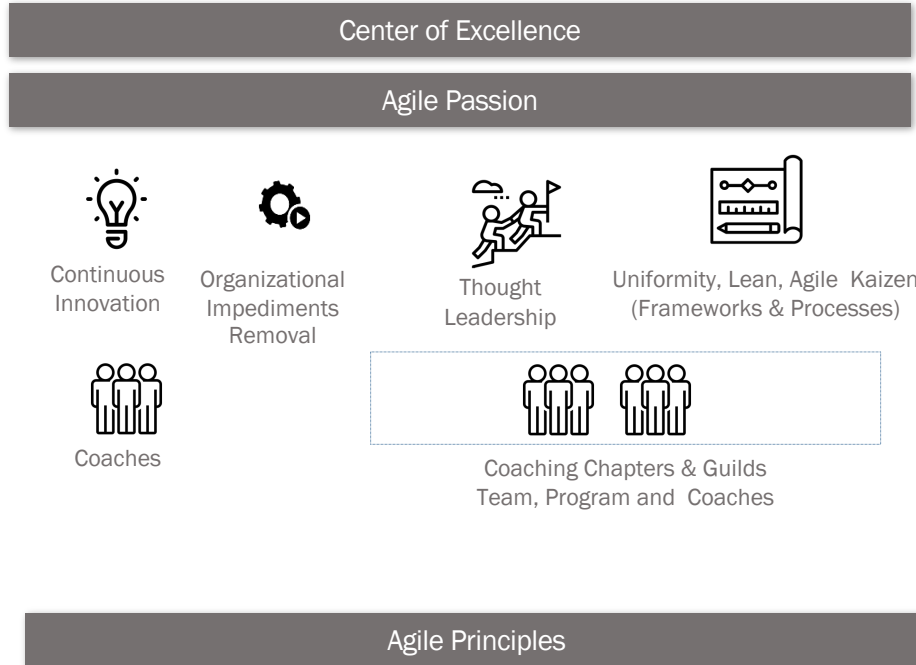
# Iterative Transformation Framework

Using **UST an Integrated Maturity Assessments** and a mix of Enterprise, Portfolio and Team Coaching, our experts help guide clients with the preparation of **realistic transformation backlogs**, adoption roadmaps, **action plans** and tools to **measure progress** based on business metrics as the change is incrementally executed and regularly inspected and adapted





# Setup your Coalition



## Coaching Attributes

## Checklist

1 Delivers Impact & Measures the right results



2 Embodies Agile and Customer Centric



3 Committed to Expertise & Innovation



4 Delivers embedded coaching and digital accelerators

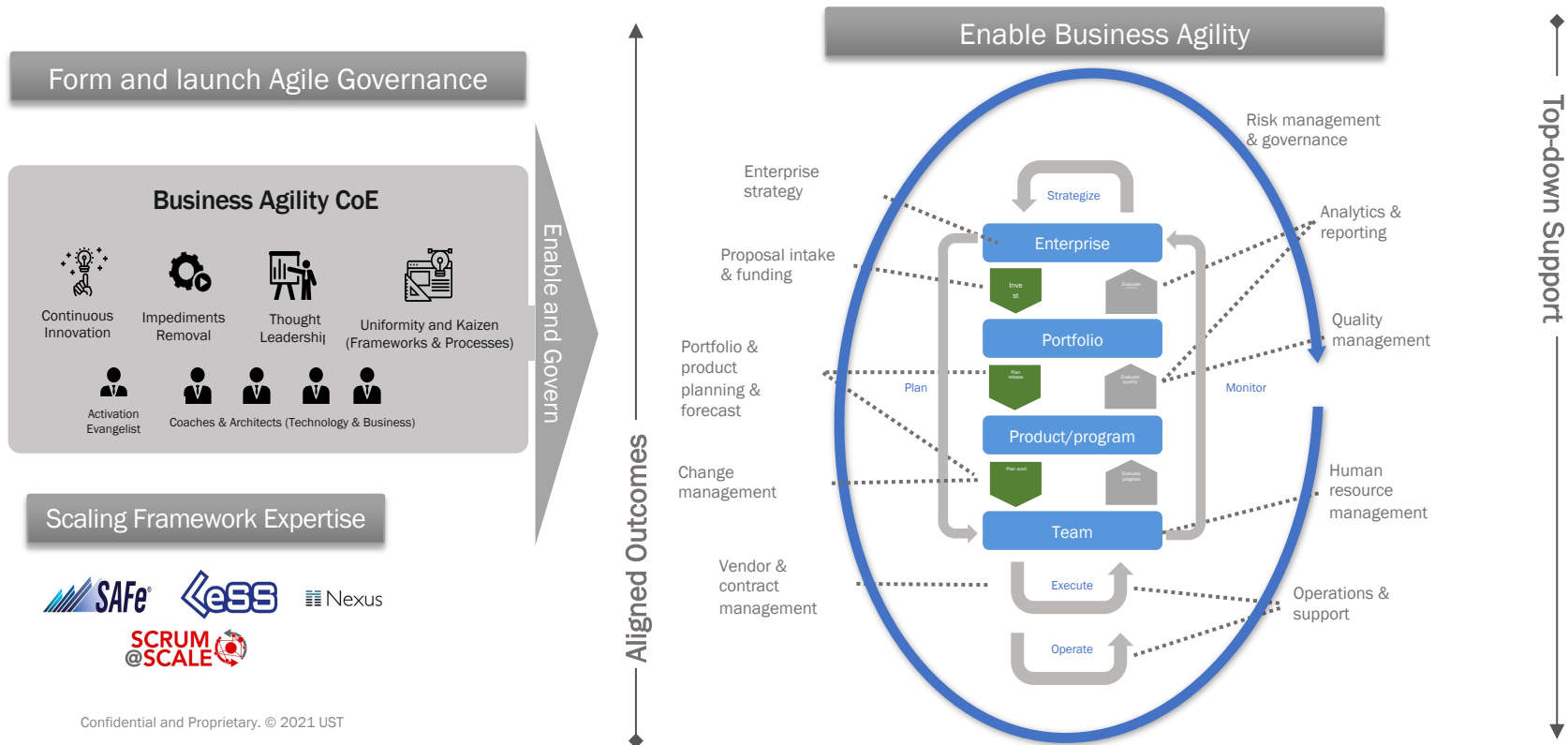


5 Engages Broadly & Promotes Enduring Change



# Manage a Sustainable Transformation

We work at different levels or across the whole enterprise. We are experts in all major agile methods and scaling frameworks and we use this expertise to customize the solutions that best fit our client goals



# We select and train coaches to embody agile values and passion

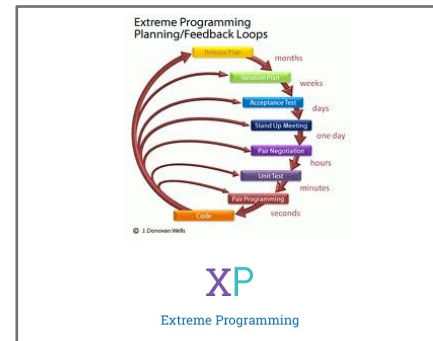
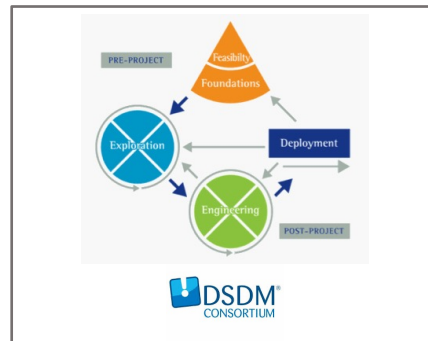
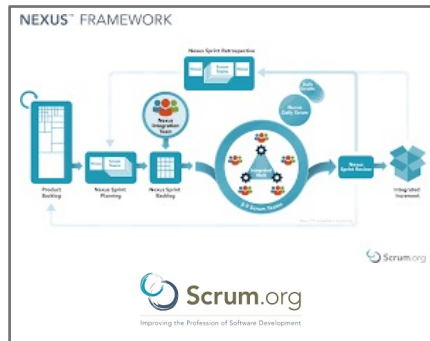
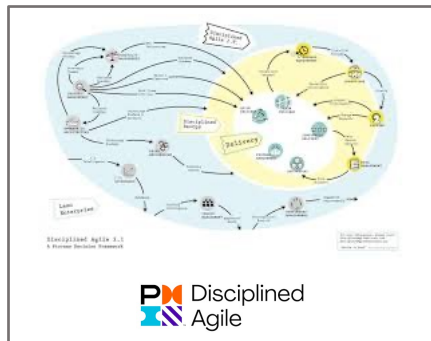
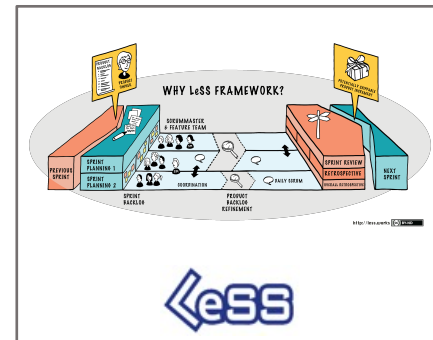
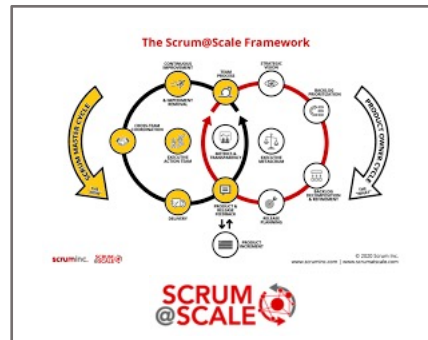
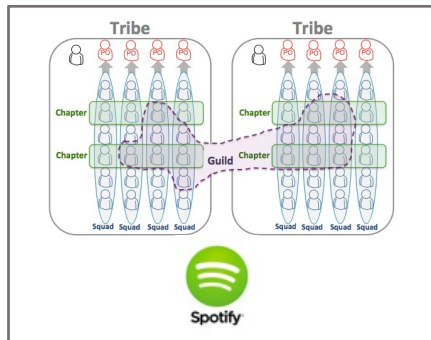
We believe an Agile is  
**40%** doing and **60%** being

The **being** aspect of a coach has **far-reaching and long-lasting impact** on people, squads and organizations

Select and train you change agents with the objective that they strive at core attributes required to excel as a servant leader

1. **Passion** for **agile principles** and **values**, embrace them on the day by day basis and live by them
2. **Expert** on **agile** methods, frameworks and tools
3. **Embody agile** and to **continually teach, coach and problem solve**

# Frameworks are important, but focus on Principles











# Frameworks are important, but focus on Lean- Agile Values and Principles

**Individuals and Interactions** over processes and tools  
**Working Software** over comprehensive documentation  
**Customer Collaboration** over contract negotiation  
**Responding to Change** over following a plan

1. Visualize existing Workflow
2. Limit Work-in-Progress
3. Manage Flow
4. Make Process Policies Explicit
5. Implement Feedback Loops
6. Improve Collaboratively
7. Evolve Experimentally
8. Using models & scientific method

# Value Driven at all levels

We drive, deliver and measure value at each step of the way across all dimensions (Operations, Business and Culture)

|                           | Culture   | Automation   | Lean  | Management & Measurement  | Sourcing  | Sharing  |
|---------------------------|---|--|---|---|---|--|
| DevOps Trends<br>(CALMSS) |  |           |    |  |  |   |
| Industry View             | Content Collaboration & Coordination across App Lifecycle                         | Automated CI/CD pipeline using orchestrator platform                                       | Eliminate Bottlenecks across App Lifecycle  | 3 dimensional approach balancing people, process and technology                     | Adoption across multivendor environments  | Insights – from the lifecycle & from the customer – available to all   |
| Edge-Ops Advantage        | D- Pod driven In-sprint coaching  | Edge-Ops™ Unified Platform   | Edge-Ops™ Transformation Service  | Edge-Ops™ Insights  | Edge-Ops™ Operating Model   | Edge-Ops™ Insights   |
| Outcome                   | <b>vmware</b><br>80% Adoption Improvement   | <b>McKESSON</b><br><i>Empowering Healthcare</i><br>4 releases/quarter To: 4 releases/month |  <b>STATE STREET</b><br>\$3 Million Annual savings in releases | <b>XEROX</b> ®<br>3X faster releases  | <b>T-Mobile</b><br>3x improvement in MTTD/MTTR App security issues                  | <br>5x improvement in delivery throughput |

# Major Investment Bank - Global Enterprise Transformation

## Divisions:

Equities / Fixed Income | Research / Legal/ Compliance | Wealth Management | Investment Banking and Capital Markets and Institutional Security  
Group | Operation/Risks | Enterprise Technology Services | Infrastructure Technology Services | Finance | HR | Research

### Business Goal - Change the Bank:

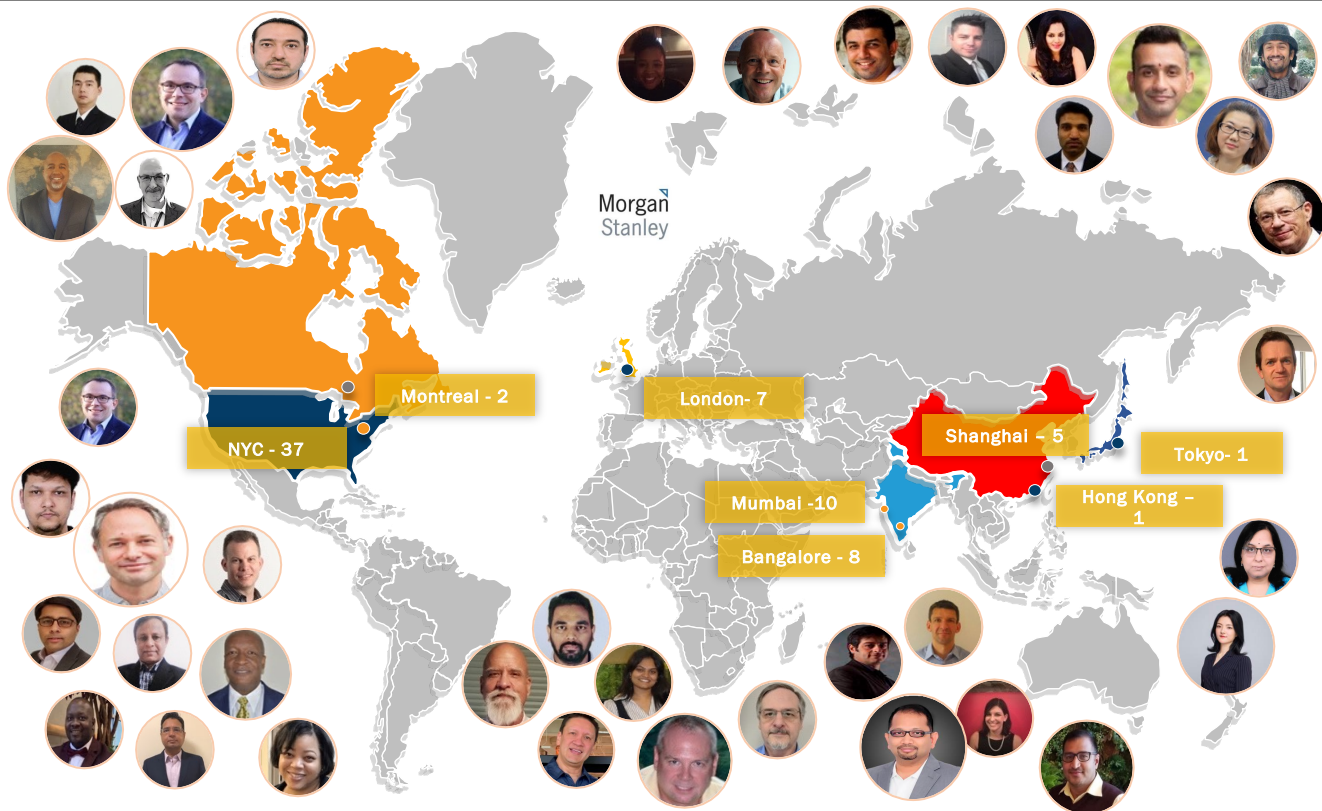
- Faster Delivery 30-50%
- Increase Productive 10-20%
- Raise Customer Satisfaction
- Improve Employee Satisfaction
- 14,500 people on the agility path

UST Global is the primary transformation partner for the Investment Bank Agile Center of Excellence

Divisional Transformation planning, Lean Portfolio management, Program, Product and Team level coaching

Principled and Business Outcome driven approach

Self sustainment through Coach the Coach and Leadership Mentorship programs



# Major Enterprise Global Bank Portfolio Agile adoption

We transform our clients globally



## Q1 2015

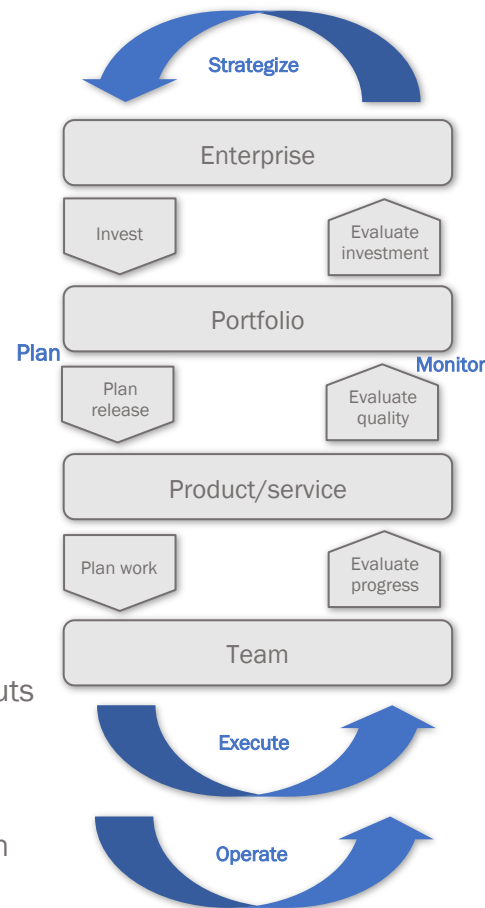
- Wide-world enterprise strategic transformation in Spain
- Scaling approach
- Agile project delivery
- Training and education

## Q3 2015

- Global transformation rollouts
- Over 20 Agile coaches HQ
- 7 coaches in Mexico
- Engaged with 14 BUs in Mexico

## Q2 2018

- Global transformation rollouts
- Over 20 Agile coaches HQ
- Over 20 coaches in Mexico
- Engaged with more 20 Bus
- 7 Coaches in US focused on business transformations
- Leading transformation in LATAM and Turkey







Thank You

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