SECTION I Setting the Stage for Change: February

Chapter 1 Wes's Challenge at MCCA: February

Narrator: Wes
MCCA's Past (in Microfilm) versus Its Future (in Information Management)
MCCA's Transformation Goal: Fix Operations and Build New Technology Products
Wes's New Role: New Product Development, Including Technology
Wes's New Organization and People
Endnotes

Chapter 2 Mary’s Challenge at FinServia: February

Narrator: Mary
FinServia's Troubles: Glacial, Unresponsive Product Development
FinServia's Transformation Goal: Faster and Cheaper

Chapter 3 Setting Initial Approaches for Both Companies: February

Narrator: Wes
Building a Lean and Agile Change Model
Comparing the Two Opportunities, and Selecting an Approach
Wes and Mary Make Their Initial Plans
Endnotes
SECTION II  Understanding the Landscape: March

Chapter 4  Getting to Know the MCCA Team and Culture: March ........................................ 51

Narrator: Wes
Meeting My Development Team ........................................ 52
Transforming Operations, Including the Relationship with Sales ........................................ 56
Wes Visits San Diego National Insurance ........................................ 64
Preparing to Meet SDNI ........................................ 65
Listening for Customer Value ........................................ 68
Understanding the Customer's Needs ........................................ 70
Endnotes ........................................................................ 76

Chapter 5  Reorienting FinServia's Relationship with GRI: March ........................................ 77

Narrator: Mary
GRI’s Death Grip on FinServia’s Technology ........................................ 77
Meeting with GRI: Being Clear about What FinServia Needs ........................................ 81
GRI Goals and the Win-Win ........................................ 84
Endnotes ........................................................................ 88

Chapter 6  Solving the Chief Engineer Puzzle at MCCA: March .... 89

Narrator: Wes
Finding a Project Manager to Handle Part of the Chief Engineer Role ........................................ 89
Finding a Product Manager to Handle Part of the Chief Engineer Role ........................................ 93
Endnotes ........................................................................ 105
### Section III: Beginning the Transformations: April–May

#### Chapter 7  Six Weeks to Change the FinServia Organization: April

_Narrator: Mary_

**Early Week One: Planning the FinServia Development**

- Option 1: A Functional Organization ........................................... 110
- Option 2: A Divisional Organization ........................................... 111
- Option 3: A Matrix Organization ................................................. 112
- Option 4: Chief Engineers with Shared Support ......................... 114

**Later in Week One: Planning the Transition with GRI** .... 118

**Week Four: Selecting the People** ............................................... 123

**Week Six: Announcement Day** .................................................. 128

**Endnotes** .................................................................................. 131

#### Chapter 8  Six Weeks to Start the MCCA Transformation: May

_Narrator: Wes_

**Week One: Preparing for the Management Scrum** ................. 133

**Week Two: Assembling and Training the Team** ..................... 136

  - **The Team Assembles: Overview Training** ......................... 137
  - **MCCA Value Defined by Owners, Customers** ................. 140
  - **Lean Product Development Introduced** ............................ 142
  - **Agile Software Development: An Implementation of Lean Product Development** .......................... 144
  - **Agile Introduced** ............................................................... 146
  - **Scrum Explained** ............................................................... 149
  - **Next Steps** ...................................................................... 153

**Week Four: Creating the Management Backlog and the Release Plan** ..................................................... 154

**Week Six: Lean Team Scrum Meeting** ................................... 164

**Endnotes** .................................................................................. 169
SECTION IV  Transformations
Take Hold: May–September

Chapter 9  Making Delivery Commitments at FinServia: May

Narrator: Mary
The Classic Struggle: Setting Dates and Costs ............................ 173
The Date/Cost Commitment Struggle at FinServia ..................... 174
Configuring Agile Releases: Distributing to and
Managing Multiple Backlogs .................................................. 179
Endnotes .................................................................................... 183

Chapter 10 MCCA Engages with Its Sales Force and Customers
at DocWorld: Late July ............................................................... 185

Narrator: Wes
Wes’s Six-Month Retrospective .................................................. 185
User Conference Preparation: The Product Roadmap
and Customer Engagement Planning ...................................... 187
Connie and Wes Agree on Sales Guidance ............................. 191
Partnering with Customers and Prospects: Demos and
Backlogs .................................................................................... 195
Endnotes .................................................................................... 199

Chapter 11 Sprint 1 Demo at FinServia—Dealing with
Disappointment: July ................. ............................ 201

Narrator: Mary
Mary’s Six-Month Retrospective .................................................. 201
Tools Can Help, Tools Can Hurt ................................................. 203
Results of Sprint 1 Disappointing: The Sprint Demo .............. 204
Discord during the Sprint ......................................................... 204
Ready or Not, Sprint and Demo ............................................... 206
Reviewing the Plan for Sprint 1 ............................................... 207
(Lack of) Accomplishments of Sprint 1 ............................... 209
Code Demo for Sprint 1 ......................................................... 213
Sprint 1 Retrospective ............................................................... 215
Margaret Plans and Facilitates the Retrospective .............. 215
Endnotes .................................................................................... 229

Chapter 12 Jack’s Gambit at MCCA ........................................ 231

Narrator: Wes
Section V  Looking Back and Looking Ahead: December

Chapter 13  Sustaining Lean and Agile: December

Narrator: Wes

Comparing the MCCA and FinServia Experiences
Sustaining a Lean and Agile Software Culture
  Building Towering Technical Competence
  Building and Sustaining Cultural Values
Strategic Planning and Study
  Customer-Focused, Hands-On Leaders
  Lightweight Processes
Endnotes

Section VI  Summary and Conclusions

Chapter 14  Transforming to Become Lean and Agile

Summary of the People Driven Approach
Summary of the Drive People Approach
Vision and Leadership
  Set a Simple and Compelling Vision
  Build a Supporting Coalition
  Make a Plan, Specific to Your Reality
  Use Integrating Events
  Accelerate Delivery
  Find Outside Wisdom
  Encourage Engagement and Debate, within Limits
  Understand Your Boundaries
  It's (Almost) Always about the Money
People
  Give Existing Leaders a Chance
  Let Obstructionists Continue Their