

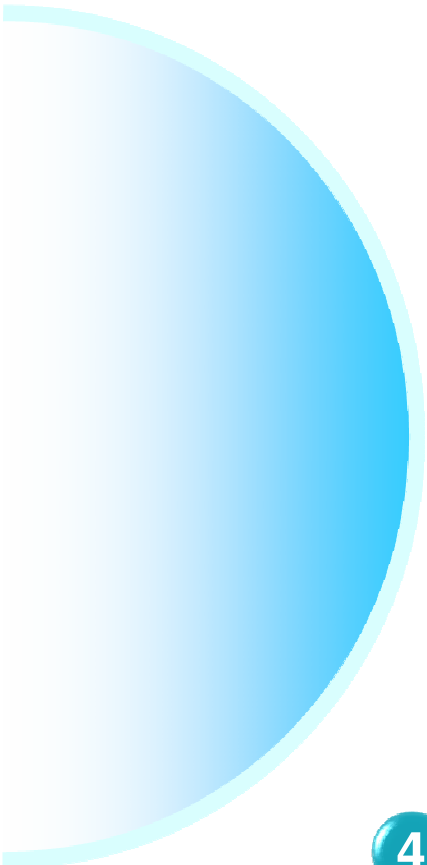
IBM at Agile  
Australia 2012



# Agile Sales! Is that a thing?

Kurt Solarte – Sr. Managing Consultant  
Wednesday 30<sup>th</sup> May 2012

# Agenda

- 
- 1** Description of the team and environment
  - 2 Description of principles and process
  - 3 Benefits achieved & view of the dashboards
  - 4 Questions



# The Team

## Pre-sales or Sales Support Staff

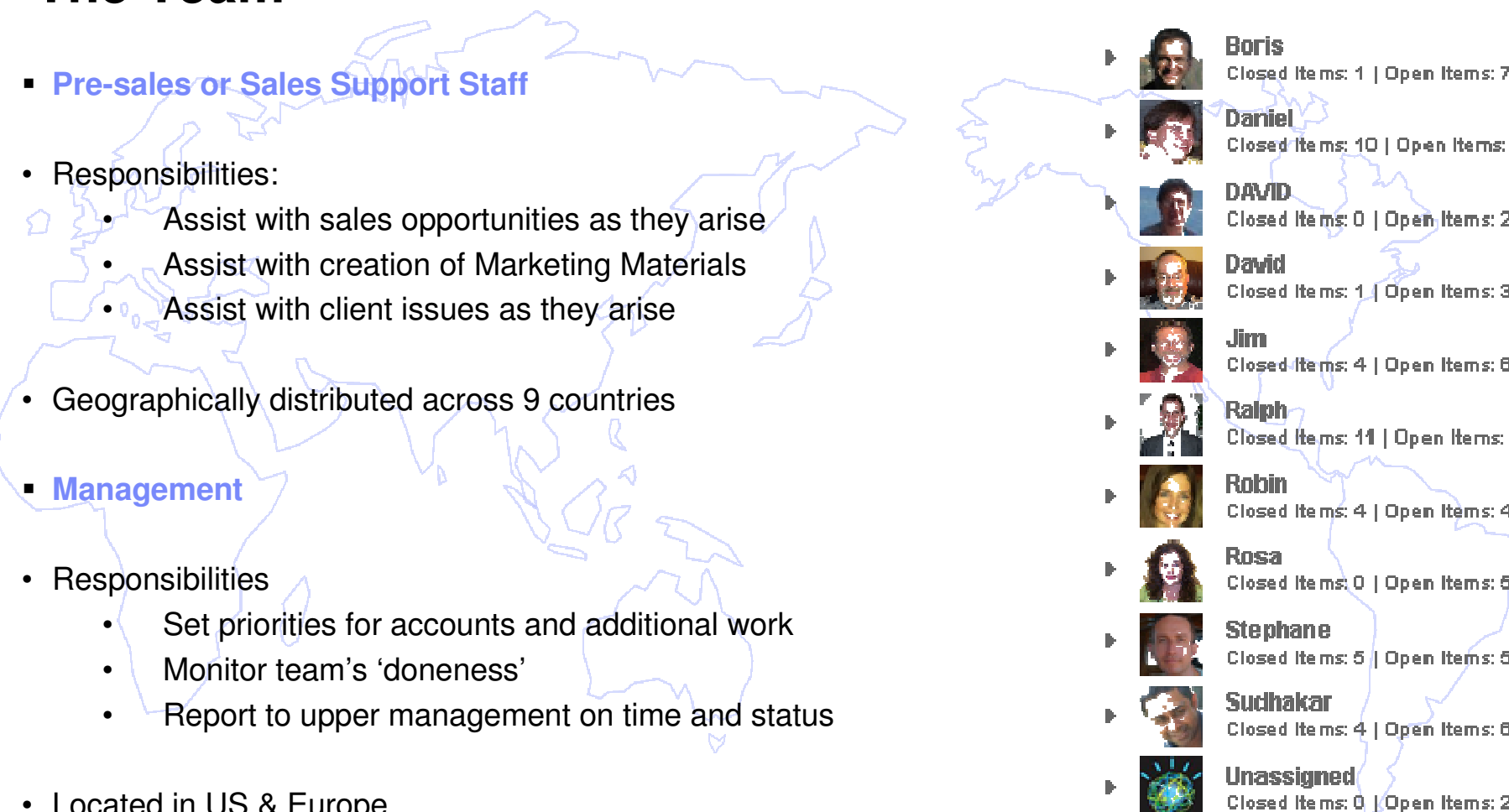
- Responsibilities:
  - Assist with sales opportunities as they arise
  - Assist with creation of Marketing Materials
  - Assist with client issues as they arise












- Geographically distributed across 9 countries

## Management

- Responsibilities
  - Set priorities for accounts and additional work
  - Monitor team's 'doneness'
  - Report to upper management on time and status

- Located in US & Europe



	<b>Boris</b> Closed Items: 1   Open Items: 7
	<b>Daniel</b> Closed Items: 10   Open Items: 8
	<b>DAVID</b> Closed Items: 0   Open Items: 2
	<b>David</b> Closed Items: 1   Open Items: 3
	<b>Jim</b> Closed Items: 4   Open Items: 6
	<b>Ralph</b> Closed Items: 11   Open Items: 14
	<b>Robin</b> Closed Items: 4   Open Items: 4
	<b>Rosa</b> Closed Items: 0   Open Items: 5
	<b>Stephane</b> Closed Items: 5   Open Items: 5
	<b>Suchakar</b> Closed Items: 4   Open Items: 6
	<b>Unassigned</b> Closed Items: 0   Open Items: 2

# The Customers

## Marketing

- Who in marketing?:
  - World Wide Marketing Organisation for the brand
  - Local country or geo marketing groups
  - Industry or sector marketing leads
- Geographically distributed in over 60 countries

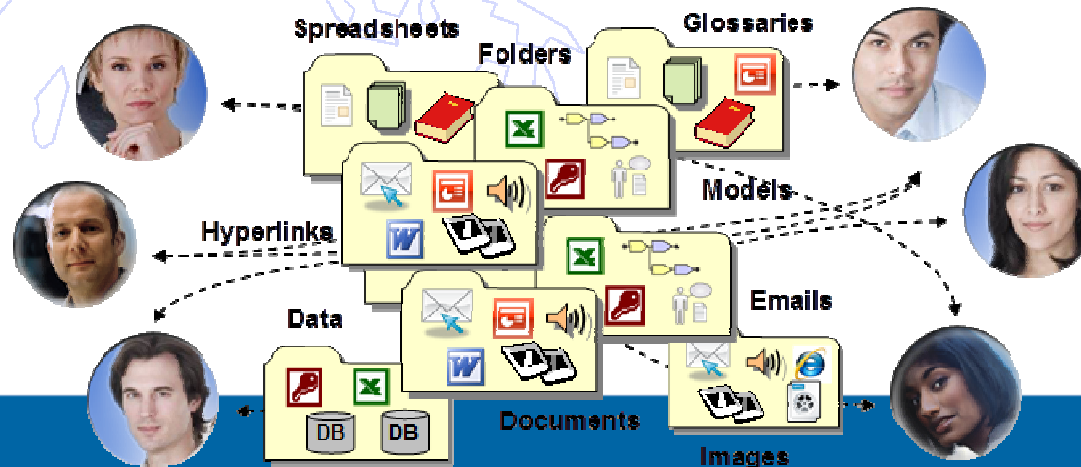
## Sales

- Who in sales?
  - World Wide Sales Executives
  - Local Sales Executives
  - Local sales and pre-sales teams
- Sales presence in over 130 countries

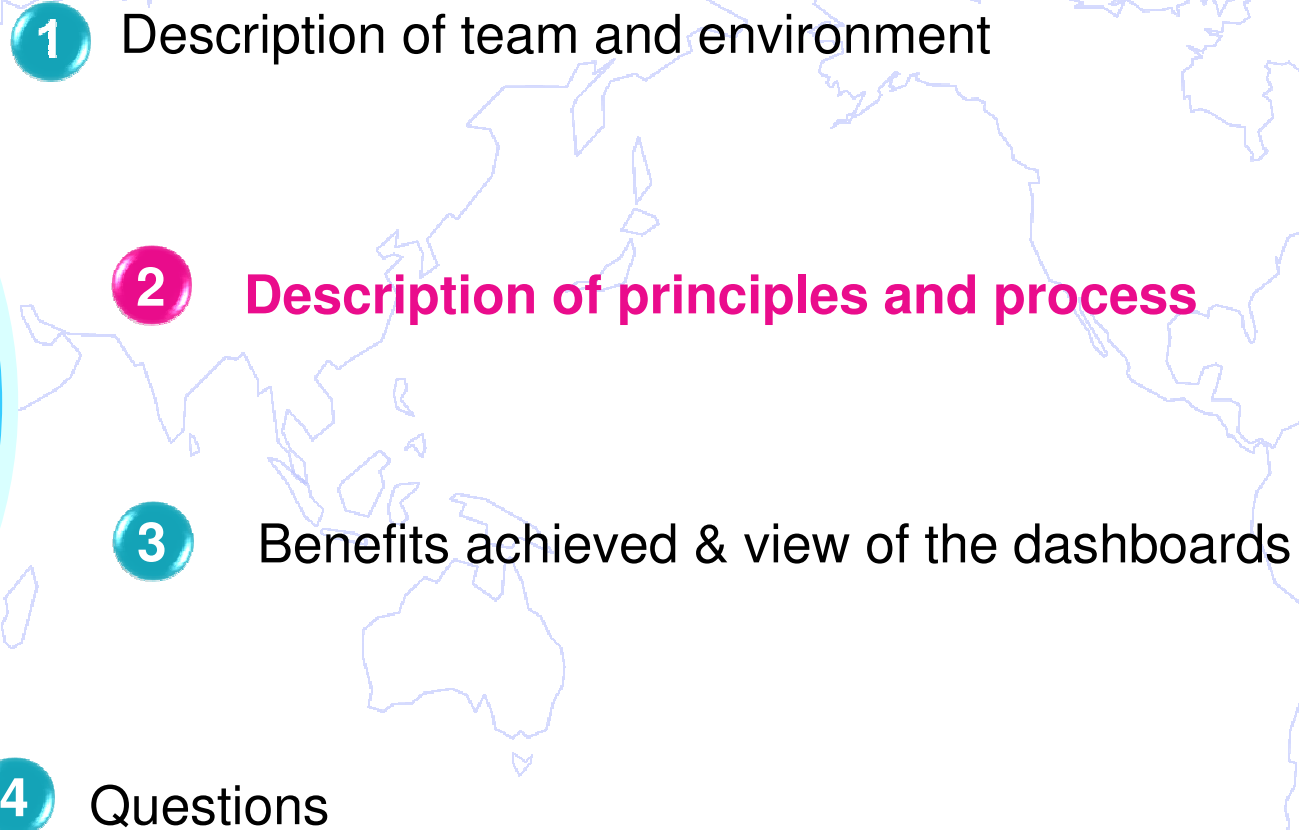


# The Original Environment / Issues

- **Team was 'slave to many masters'**
  - Inability to properly understand priority or scope
  - 'Biggest Fish' prioritisation the largest account or opportunity always won
  - Inability to change priorities fast enough
- **Management spent too many hours attempting to get 'status'**
  - Attempting to call/email status across time zones
  - Attempting to manage dependencies across the team & time zones
- **Inability to efficiently plan and manage different types of work**
  - Forecasted long range work like marketing materials (ie blogs & articles)
  - Immediate reactive work like client issues and sales opportunities



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# The Basis for a New Way Forward

## Lean / Kanban Principles

- Move to Pull Method of working
- Limit work-in-progress
- Use a unified taskboard/dashboard

## Scrum Principles

- Work in timeboxed fashion (sprints)
- Use a unified taskboard/dashboard
- Retrospectives





# The New Process

## The Backlogs


- Three tiers of backlogs are kept:
  - The 'Team backlog' functions similar to a product backlog
  - The 'Quarterly backlog' functions similar to a release backlog
  - The 'Monthly backlog' functions as the sprint backlog
- Managing the backlogs:
  - Planned & Prioritised using virtual planning meetings across global team
  - Worked using Scrum of Scrums across distributed teams

## Work on the backlogs

- Epics & Stories used for 'Visioned' work:
  - Epics used for Market Themes
  - Stories used for enablement actions (blog posts, articles, whitepapers, etc)
- Sales Opps & Tasks used for 'Reactive' work(similar to defects):
  - Sales Opps used for special sales opportunities that arise and need work
  - Tasks are used to decompose a Sales Opps across team members



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# End-User Customer Benefits

## Giving a Method to the Madness

- Customers become part of the planning:
  - Instead of just logging a request and waiting to see what happens.
  - Forces customers to see the impact of their request on the greater team.
- All 'Customers' understand rank and progress :
  - Helps foster understanding of why/when work gets done.
  - Keeps politicking and 'horse-trading' out in the open, obvious to everyone.

## Ability to 'BE' agile

- Ability to change and respond to market:
  - Seeing what is WIP, allows customers to more 'logically' change their mind.
  - Looking over backlogs and completed items helps identify market trends.
- Ability to see understand change impacts in real-time:
  - Highlights the impacts between marketing changes and sales requests.
  - Instant understanding of impact a reactive item has on planned items.



# Team Member Benefits

## Giving a Method to the Madness

- True understanding of priority:
  - No matter how urgent or how important one customer makes it sound.....
  - Offers cover to team when politics enter the mix.
- The Ability to work and organise across a global team:
  - Streamlines collaboration and teaming across shared tasks.
  - Allows grouping and trending of tasks, world wide.

## Reduction of Reporting Overhead

- Better view of Doneness:
  - Ability to link and create dependencies on related tasks.
  - A more complete view of all related tasks, and their completeness.
- Running off of real-time live data:
  - Complete removal of data collection activities (took over 24 hrs across time zones).
  - Complete removal of report creation, validation, and emailing.



# Taskboard View

## Jumpstart 2012 Q1 Work

Auto-Save  \_\_\_\_\_

Plan Details

Edi

Planned Items Links Snapshots Notes

View As: taskboard



- + +

Story

Open

In Progress

Closed

Coordinate Jumpstart Innovate 2012



Documentation of the cluster deployment

--

Add mainframe artifacts to MTM scenario

--

Enable the world



Review infocenter content for

--



Add mainframe artifacts to Money that Matters

--



Add mainframe artifacts to Money that Matters

--



Add mainframe artifacts to Money that Matters

--

Identify high-level

External h on:



# Planning View

Jumpstart 2012 Q1 Work

Auto-Save

Plan Details

Edit

Planned Items

Links

Snapshots

Notes

View As: Work Breakdown

▶		Dan Closed Items: 10   Open Items: 1
▶		Ralph Closed Items: 11   Open Items: 14
▶		Rosa Closed Items: 0   Open Items: 2

Load: 4,447.5 +197.5

Estimated: 53%

Load: 15.43 +82

Estimated: 14%

Load: 101.44 +72

Estimated: 30%

Jumpstart 2012 Q1 Work

Auto-Save

Plan Details

Edit

Planned Items

Links

Snapshots

Notes

View As: Work Breakdown

▶ Dan  
Closed Items: 10 | Open Items: 1

Load: 4,447.5 +197.5

Estimated: 53%

Actions	Summary	Priority	Status	Time Spent	Estimate
	- CRTOE - Devers slows down or freezes under heavy load - provide shared disk	...	In Progress	2 weeks	...
	: Deployment guidance for CLM 301 - expansion of current deployment	...	New	-	-
		...			
		...			
▶	Support for Jazz SaaS Offering in the Cloud	...	New	-	-
	Update Jumpstart guidance to include guidance for release of CLM 2012	...	New	-	-
	PLC deployment experience in Microservices environment	...	New	-	...
	WebSphere Xtreme Liveness: stream strategies	...	In Progress	-	...

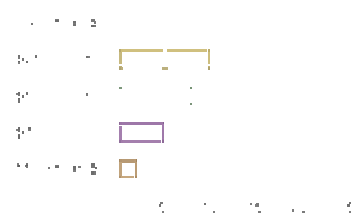


# Dashboards

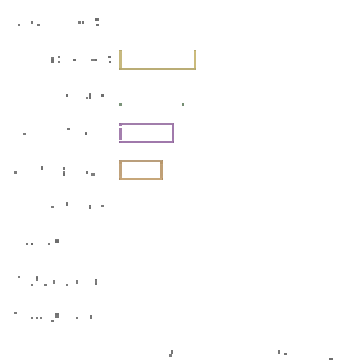
## Jazz Jumpstart

General | **MOR 2012 - Results** | Web Impact | **Current Engagements** | **Files** | Watch Us | Summary Status | Chadwick Status | Cierner Status | Frederick Status | Ruschel Status | Leroy Status | Naranjo Status | Fuchlin Status | Schoon Status | Toboala Status | Velle Status | Blogs | QLM 2012

Deal... | 2012 | Summary by quarter



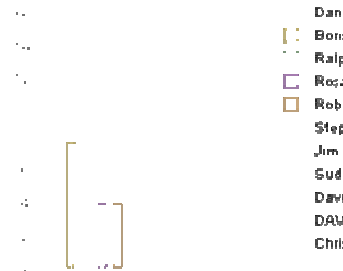
Active Jumpstart... | 2012 | Number of Deals



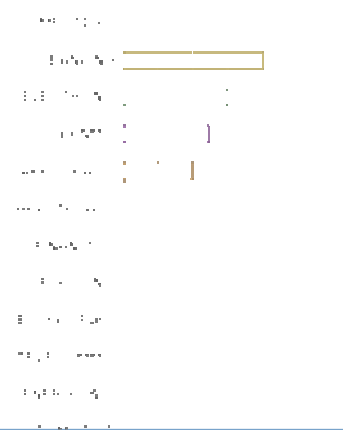
Closing Q... | 2012 | Target closing quarter



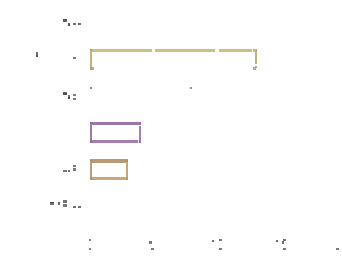
Active Jumpstart Re... | 2012 | Summary by quarter



By Industry | 2012 | Active Industry



Active Jumpstart Requests... | 2012 | Summary by quarter



Active Jumpstart Requ... | 2012 | Number of Requests





# Individual Active Status Report

## Jazz Jumpstart

[General](#) [MOR 2012 - Results](#) [Web Impact](#) [Current Engagements](#) [Fix Us](#) [Watch Us](#) [Summary Status](#) [Chadwick Status](#) [Clemm Status](#)  
[Frederick Status](#) ▾ [Kuschel Status](#) [Leroy Status](#) [Naranjo Status](#) [RuehlIn Status](#) [Schoon Status](#) [Toczala Status](#) [Yehle Status](#) [Blogs](#) [CLM 2012](#)

### How to use this status report page

Click the heading of any viewlet (except the bottom right one) to see the details. The left column contains customer work. The right column contains other work. The bottom right viewlet contains links to other places where I also own work.

### Frederick - Other Work - Open (10)

- 4940: Update the Reporting Workshop
- 4603: Clustering with Jazz
- 6243: Documentation of the cluster deployment steps for WAS Network Deployment, incl. recommendation for primary ...
- 4958: Investigate Caching proxy and distributed SCM use cases for potential write-up
- 4952: JazzHub Initiative: University of Wollongong
- 3167: We need some article about using LPA
- 4270: ██████████: RTC assistance
- 4778: Innovate 2012 presentation: ██████████ ALM story
- 4776: Development Intelligence: Jazz CLM RRDI Workshop
- 4640: Reverse Proxy Education

### Frederick - Client Requests - Open (3)

- 8474: ██████████: RTC assistance
- 6502: ██████████ guide to setup RTC for Agile adoption.
- 8341: ██████████ Large Transformation Opportunity ██████████

### Frederick - Other Work - Resolved in past month (1)

- 4719: Set up cloud environment for checking out clustering

### Frederick - Client Requests - Resolved in past month (0)

No work items found.

### Frederick (secondary) - Client Requests - Resolved in past mon... (0)

No work items found.

### Other places Freddie has work to do

Lotus Connections Communities

[Jazz Jumpstart Community](#)

My Project Areas

[Jazz Support - jazzdev](#)

[JazzCB - jazz02 - jazz.net content](#)

[Jazz Collateral Team](#)



# Monthly Operational Reports

## Unleash the Labs

General Current Work Results - Current Quarter Results - All Fix Me MOR Closed Opps MOR Quick MOR ULL Industry MOR

ULL Horizontal MOR

### Headlines

### MOR Tagging Updates

The queries used to build this dashboard rely on consistent usage of a few tags.

**WHEN** : First is the when tag, for this MOR you need **feb2012** which is the current tag we are querying on.

**WHO** : Next is the who tag provide a scope as to how this rolls up:

**ull-hs** (required to show up here) - Items to be presented on Paul's MOR

**ull**

**ull-industry** - Dave's MOR

**ull-sdt** - Tom's Team

**WHAT** : Second is the what tag, provide some context around what this work is for

**mor-highlight** - Item to be discussed on team MOR

**key-engagement** - Item to be discussed on Rick's MOR

### MOR - current - ull-hs, m... (48)

E287: RPE migration from SoDA for

4242: Assistance to deliver a PPM Rollin with RTC/FP/Insight for

E477: Assistance perform sizing, and environment for adoption of RTC for customer

4427: contract with Rational Providing System Architect TOGAF Support

E455: Need to know whether the System Architect support RTC Integration currently works with an Oracle database on the back-end

2134: RA DoDAF Conversion Missing

4681: teaming opportunity for supporting Federal Opportunity

4789: Support and Advise System Architect Development on TOGAF Implementation

E383: Create IBM Solution Brief for DoDAF 2 Migration Toolkit

E385: Present DoDAF 2 Migration Toolkit to Architects in Norfolk VA

Page 1 of 5

### MOR - current - ull-hs, key... (4)

E317: Support Smarter Business Platform

### MOR - current - ull-h... (48) Owned By

Dennis W. S...  
Charles Fairis  
Maro J. Ne...  
Sean G. Wn...  
Tim R. Fee...  
Takehiro ...  
Alejandro C...  
Eric Larsen  
Sudhakar Fr...

0 1 2 3 4 6 6 7

### MOR - current - ull-hs, m... (48) Tags

2012 accelerator clearquest dec2011  
feb-2012 feb2012 gbs  
Integration-engineering Internal-deploy issue  
jan-2012 jan2012 key-engagement  
key-engagement-dec11 key-engagement-jan12  
lessons-earned mar2012 mnr  
mor-highlight mor-highlight-jul11  
mor-highlight-oct11 post-sales-revenue relm  
revenue-generating revenue-generating-jan12  
rtc-sme services-opportunity ull ull-highlight  
ull-hs





# Agile AUSTRALIA '12

30 - 31 May 2012 | Hilton on the Park, Melbourne

Adapt, Innovate, Collaborate, and Deliver!

## Questions

