Accelerate Your Technical and Cultural Transformation With Visual Planning

Greg Tutunjian, Agile Coach and Educator
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Greg Tutunjian: Agile Coach & Educator

✧ 20-years of practical Agile experience:
  ✧ 9-years as a coach, mentor & trainer
  ✧ 11-years as a technical engagement lead, etc.
✧ People-centric Agility: I meet you where you are
✧ Unconventional and innovative patterns to get to Done

✧ Proven effectiveness as coach, mentor and trainer amplifying Agile culture and team effectiveness (startups → enterprise)
✧ Technical leadership roles planning, developing and delivering complex solutions and differentiating products
✧ Hands-on software, hardware and systems engineering development and delivery experience (startups → enterprise)
Roadmap

Transformation via Visual Planning

- Resources
  - Tools
  - Training

- Your Journey

- Origin Story
  - Greg Gets Visual
  - Evolution Not Prescription
  - Models vs. Scripts

- Solutioning
  - Transformation Opportunities

- Reference Architecture

- Applied Concepts
  - Metaphor Maps
  - Strategy Maps
  - Mind Maps
Origin Story

Transformation via Visual Planning

Greg Gets Visual
Evolution Not Prescription
Models vs. Scripts
Why Visual Planning

- Accelerated and enhanced participant engagement
- Abstraction is simpler to communicate
- Everyone can participate
- Artifacts become reference architectures
- Flow is visible and discernible
- Far less tedious (and less wait time)
- Reusability
Greg Gets Visual

Applications 1970’s

Chunks & 
Hunks

Solutions 1980’s

Mind Mapping

Teams 1990’s

Manual Modeling

Simulation & 
Modeling

Enterprise Y2K+

Metaphor & 
Strategy Maps

2010+

13th Annual IEEE/ACM IT 
Professional Conference at TCF
Evolution Not Prescription

- Paper-based Modeling
- User Experience Mockups
- Rapid Prototyping
- Tight Feedback Loops
- Direct Observation

**VS.**

- Formal Architecture
- Wireframes (Designs)
- Phase-based Development
- Weekly Status Meetings and Reports
- Multi-disciplinary Roles

Delighted!

13th Annual IEEE/ACM IT Professional Conference at TCF
Models vs. Scripts

- Groan Test
- Smell Test
- N.I.H. Test
- Legacy Test
- Domino Test
- Antipathy Test
- Awakening Test

2003 → 2018
Transformation Outcomes

The Business Trusts “IT”

Additional Resources & Scope ($)

Employee & Vendor Engagement

Increasingly Predictive Delivery

Visual Planning
# Transformation Details

<table>
<thead>
<tr>
<th>Engagement</th>
<th>Conditions</th>
<th>Transformation</th>
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<tbody>
<tr>
<td>Verizon Communications</td>
<td>• 2-Year delay of strategic solution</td>
<td>• Aligned distributed teams</td>
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<tr>
<td></td>
<td>• Business and IT discord</td>
<td>• Business confidence (and $) restored</td>
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<td>Bank of America</td>
<td>• Rewritten applications (24) idle</td>
<td>• Multi-tier solution completed</td>
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<td></td>
<td>• Pending legacy maintenance fee</td>
<td>• ATM solution available to customers</td>
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<td>Harvard Pilgrim Health Plan</td>
<td>• 3 teams not collaborating</td>
<td>• Relationships forged and maintained</td>
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<td></td>
<td>• Audit finding unresolved</td>
<td>• Audit finding resolved in time</td>
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<tr>
<td>MultiPlan</td>
<td>• Enterprise EDMS rollout stalled</td>
<td>• EDMS program completed</td>
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<td></td>
<td>• Vendors not engaged</td>
<td>• Vendor participation (including DSU)</td>
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<tr>
<td>Ipswitch</td>
<td>• 2 previous “new product” failures</td>
<td>• First new product in 10 years</td>
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<td></td>
<td>• Lack of confidence in Agile</td>
<td>• Team room and Kanban adoption</td>
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<td>UMass Memorial Healthcare</td>
<td>• 2-year old procurement 5% utilized</td>
<td>• Candid appraisal of solution state</td>
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<td>• Vendor charging/no value derived</td>
<td>• 8 new FTE roles defined</td>
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<tr>
<td>U.S. Air Force</td>
<td>• Less than 25% of needs addressed</td>
<td>• Robust strategic planning framework</td>
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<td>• Strategic roadmap in one slide</td>
<td>• Improved visibility with vendors</td>
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Mapping Progression

Metaphor Mapping (Culture)

Mind Mapping (Delivery)

Effective Enterprise Solutioning

Strategy Mapping (Alignment)
Applied Concepts

Transformation via Visual Planning

Applied Concepts

Metaphor Maps

Strategy Maps

Mind Maps
Metaphor Maps

• Purpose
  – Collaborative (Action-based) learning
  – Solution evolution (not design)
  – Aha moments

• Styles
  1. Zoo (Culture)
  2. River (Strategy)
  3. Village (Process)
Metaphor Maps

• Outcomes
  – Demonstrable Consensus
  – Barrier Erosion
  – Reference Architectures

• Participants
  – Everyone
  – Everyone, and
  – Everyone
Building a Village Map

Village Mapping assumes you want to improve your operation together as a team. It asks you to think of it as a village and agree on the sticker symbols that best represent today’s reality and your ideal vision. You’ll plan how to reach your ideal at a later step.

Don’t consult data or reports in the Mapping session. Build maps from what you know and what you can imagine. You may include symbols to show the need to later verify any points.

**Steps to Build a “Current State” Village Map**

- **Step 0** Discuss situation, identify stakeholders, decide map scope
- **Step 1** Map today’s stakeholders
- **Step 2** Show Connections/relationships
- **Step 3** Show Problems
- **Step 4** Write key points

**Steps to Build an “Ideal” Village Map**

- **Step 0** Discuss objectives and functioning when objectives are being met
- **Step 1** Map future stakeholders
- **Step 2** Show Connections/relationships
- **Step 3** Show benefits, opportunities
- **Step 4** Write key points

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Applied Concepts

Transformation via Visual Planning

Applied Concepts

Metaphor Maps

Strategy Maps

Mind Maps
Strategy Maps

• Purpose
  – Organizational-alignment (unforced)
  – Employee engagement
  – Expectation modeling

• Styles
  1. Hierarchical
  2. Cultural
  3. Adaptive
Strategy Maps

• Outcomes
  – Demonstrable Consensus
  – Barrier Erosion
  – Reference Architectures

• Participants
  – Centralized decision-making
  – Decentralized decision-making
  – Everyone
Fulton County School System Strategy Map

Students
Master Curriculum

Students are
Nationally
Competitive

School Climate is
Safe and Enriching
Parents are
Involved and
Satisfied
Community is
Involved and has
Positive Perception

Instruction is Effective
Transportation is Safe and Efficient
Facilities are Safe and Well-Maintained
Resources are in Place for the First Day of School
Students have Nutritious Meals

Staff are Competent
Teachers and Other Employees are Satisfied

Sound Fiscal Management

Customer and Stakeholder Involvement and Satisfaction
Efficient and Effective Instructional and Administrative Processes
Staff Learning and Growth
Financial Performance

Strategy Map Tool Kit, The Palladium Group, Licensed Content
Marine Corps Logistics Bases Strategy Map

- **Financial**
  - (F2) Increase Revenue
  - (F1) Achieve Budgetary Balance
  - (F3) Contain Cost & Increase Productivity

- **Customer**
  - (C2) Treat With Respect & Sense of Urgency
  - (C1) Increase Operational Availability
  - (C3) Provide “Best Value” (Quality, Timeliness)
  - (C4) Keep Me Appraised

- **Understand Customer Expectations and Meet Customer Needs**
  - (U1) Improve Communication With Customers
  - (U2) Maintain & Broaden Customer Base
  - (U3) Understand Customer Needs

- **Innovative Services**
  - (IS1) Foster Innovative ideas in Support of Core Competencies
  - (LG6) Be a Learning Organization
  - (LG4) Improve Quality of Life in the Workplace

- **Operate Efficiently**
  - (O1) Improve Visibility, Distribution, & Material Access
  - (O2) Competitively Price Products & Services
  - (O3) Increase Throughput & Inventory Management
  - (O5) Reduce Costs
  - (O6) Improve Planning and Forecasting
  - (C2) Treat With Respect & Sense of Urgency
  - (C1) Increase Operational Availability
  - (C3) Provide “Best Value” (Quality, Timeliness)
  - (C4) Keep Me Appraised

- **Learning & Growth**
  - (IN1) Improve Efficiency and Effectiveness of Base Services by Leveraging Technology & Personnel Skills
  - (IN4) Optimize Use of Facilities and Services
  - (IN2) Promote Lifestyle of Safety
  - (IN3) Promote Lifestyle of Environmental Excellence
  - (LG3) Recognize Achievement and Performance Towards Accomplishing Strategic Objectives
  - (LG2) Recruit, Retain, and Develop the Workforce
  - (LG5) Ensure LogAIS Meets Requirements
  - (LG1) Forecast & Identify Skills Required
Strategy Map Template – Public Sector
Includes Potential Themes

- Stakeholder
- Customer
- Financial
- Internal
- Learning & Growth
- Innovation
- Customer Relationship
- Operational Excellence
- Regulatory & Society
- Human Capital
- Information Technology/Tools

Strategy Map Tool Kit, The Palladium Group, Licensed Content
Applied Concepts

Transformation via Visual Planning

Applied Concepts

Metaphor Maps

Strategy Maps

Mind Maps
Mind Maps

• Purpose
  – Delivery team(s) alignment
  – Employee engagement
  – Expectation modeling

• Styles
  1. Product
  2. Process
  3. Investigatory
Mind Maps

• Outcomes
  – Demonstrable Consensus
  – Barrier Erosion
  – Increasingly finite planning (vs. plans)

• Participants
  – Closest to the work
  – Evolutionary refinement of vision and delivery
  – Top-down definition, bottom-up sizing
Engagement Examples

1. New eLearning Product Development
2. Product and Services Stagnation
3. Reimagining Product and Services
4. Cloud-based Multi-module Baseline
5. Cloud-based Multi-module Data Modeling
6. Global Solution Readiness Assessment
7. Incident Response Assessment
8. Agile Adoption Custom Plan
9. Agile Working Group Plan
10. Global Deployment Release Plan
11. Agile Maturity and Training Plan
Transformation Opportunities
How To Get Started

• Solutioning
  – Model (early and often with everyone)
  – Refinement (leads to granular sizing)

• Culture Remediation
  – Evolutionary (not transformative out of the box)
  – Resistance (is not futile)

• Reference Architecture
  – Product framework
  – Service delivery
Your Journey

Transformation via Visual Planning

Resources
Tools
Training

Your Journey
Visual Planning Resources

- Map Types:
  - Metaphor
  - Strategy
  - Mind Maps

- Map Tools:
  - Mind Manager
  - Inspiration
  - iMindMap

- Books: 20

Visual Planning Resources (Greg Tutunjian)
Mapping Progression

- Metaphor Mapping (Culture)
- Strategy Mapping (Alignment)
- Mind Mapping (Delivery)
- Effective Enterprise Solutioning

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