AGILE LEADERSHIP ACADEMY

ALA-CVP COURSE WORKSHEETS

2024

Table of Contents

Case Study

Earth, Wind and Power
Harnessing Data for a Clean Energy Future

Earth, Wind and Power is an innovative data analytics company focused on accelerating the transition to renewable energy. Headquartered in San Francisco with offices across the United States, we develop cutting-edge software products that provide greater visibility into energy use, production, and infrastructure to utilities, commercial entities, and residential consumers.

Our real-time energy monitoring and analytics platforms help renewable energy providers better manage distributed energy resources and grid operations. We provide commercial and industrial companies with tools to track real-time energy consumption, identify waste, and optimize usage. For residential consumers, our user-friendly dashboards and mobile apps offer insight into personal energy use and associated carbon emissions as well as comparisons to neighborhood averages.

Since our founding in 2018, Earth, Wind and Power has been at the forefront of leveraging big data to build the smart, sustainable grid of the future. Our products provide the real-time transparency and intelligence needed to reduce carbon emissions across the energy ecosystem. We pride ourselves on our commitment to our customers while working towards a greener, more resilient power supply for all.

Challenges

- All teams (see below) work separately with a variety of cadences creating a great deal of churn managing planning and dependencies.
- Front end teams highly reliant on component and shared service teams to complete features and capabilities. This often results in delays and hand off errors.
- Releases are often delayed by dependencies, compliance and risk.
- High degree of technical debt in the CRM and Data teams have slowed delivery and increased the risk of system changes. Upgrades to the platforms taking an increasing effort to complete.
- Low visibility of work across teams and within the Leadership team.
- Teams struggle to understand priorities and often have conflicting priorities.
- Team members are often moved from team to team to manage demand, increasing the complexity of planning and burning out the people being moved around.
- Little to no consistency in the process within teams and across teams.
- Some teams have good DevOps and Agile Engineering capabilities and others rely solely on manual testing and release.
- Shared services teams such as Data, Risk & Compliance, Enterprise Service Bus, Testing and UX/UE are having issues managing demand on teams and little visibility into new work for the team.
- Utility customers are used to getting what they want as soon as they ask, regardless of any in-flight work or other commitments.
- Managing the custom integration projects with different utility back-offices.
- Balancing forward-thinking commercial customers requests with slower moving utility standards and procedures.

Technologies and Team Mapping

- Leadership/Stakeholders
  - Business owners
  - Product Managers
  - Sales
  - Marketing
  - Founder
  - Engineering Management
  - Vendor Management
  - PMO Lead
- Big CRM - Commercial Off the Shelf Customer Relationship Management system that has been highly customized for the particular verticals.
  - Core Platform Team
    - Operations and Maintenance
    - Kanban (Low Maturity)
  - Consumer Team
    - Scrum (Effective at the Team Level)
  - Commercial Team
    - Hybrid of Scrum and Waterfall (Medium Maturity)
- Business Intelligence - Focused on data analysis and usage dashboards for both Consumer and Commercial lines.
  - Energy Analytics Team
    - Incremental delivery model (Low Maturity)
- Enterprise Data - Responsible for Data and the Enterprise Service Bus.
  - Consumer Data Team
    - Hybrid of Scrum and Waterfall (Medium Maturity)
  - Commercial Data Team
    - Quarterly Waterfall
  - Enterprise Service Bus Team
    - Scrum + DevOps (High Maturity)
- Digital Group
  - UX/UE Team
  - Mobile Team - Custom development
    - Scrum (Medium Maturity)
  - Web Team Custom Development
    - Scrum + DevOps (High Maturity)
- Risk and Compliance
  - Enterprise Architecture Team
  - InfoSec Team
  - Risk Team
  - SOX Compliance

Personal Leadership Development Plan

STOP DOING

STOP

KEEP DOING

KEEP

START

START DOING

LESS

LESS OF

MORE

MORE OF
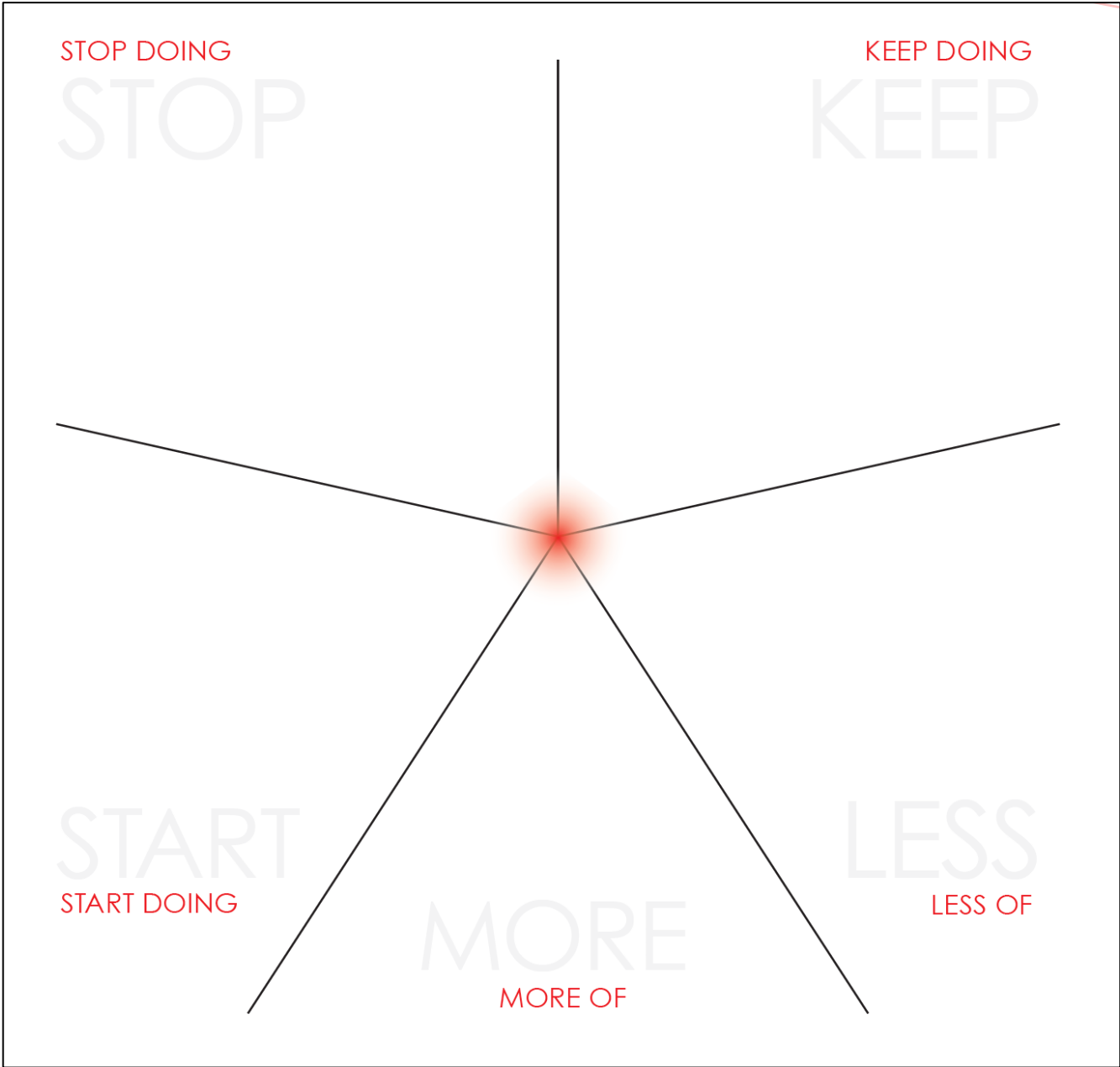
Flexible End-to-End Process

What updates to Earth, Wind, and Power's current processes would you recommend?

Now	Next	Later

Adaptive Planning

What updates to Earth, Wind, and Power's current processes would you recommend?

Now	Next	Later

Summarize Value Streams

1. Follow the instructions in the table to summarize the value streams at Earth, Wind, and Power.
2. Create a draft change agenda by naming the strategy you would use to make the change, and listing the steps you would take.

	Value Streams	Solutions	Customers
1. Summarize the value streams that are used to build the systems and capabilities that enable business processes or provide products and services to your customers. 2. What are the solutions or services each value stream provides? 3. What are the customer segments served?			

Change Agenda:

Traditional Silos	➡	Value Stream-aligned Teams

List steps needed to make this change:

EAT Roles

Role	Responsibilities	Typical Title	Identify who in your company could fill this role
EAT Executive Sponsor	• Strategy/Vision focused on technical delivery • Go/No Go decisions on new initiatives and tradeoffs • Alignment with Organizational Strategy • Support organizational change • Escalated Issue resolution	*CIO, CTO or other Delivery Executive*	
EAT Business Lead	• Strategy/Vision focused on Business Value • Go/No Go decisions on new initiatives and tradeoffs • Alignment with Organizational Strategy • Support organizational change • Issue resolution	*Product Executive, Line of Business Owner or other Business Representative*	
Agile VMO Director	• Facilitation of EAT events and Events • Monitor delivery and execution at the Portfolio Level • Maintain Risk, Issue log and track resolution • Focus on Continuous Improvement of EAT way of working	Director, VP, SVP	

VMO Roles

Role	Responsibilities	Typical Title	Identify who in your company could fill this role
Agile VMO Director	• Facilitation of EAT events and Events • Monitor delivery and execution at the Portfolio Level • Maintain Risk, Issue log and track resolution • Focus on Continuous Improvement of EAT way of working	Director, VP, SVP	(defined above)
VMO Program Manager	• Schedule VMO Meetings • Facilitate VMO meetings • Create and maintain VMO Backlog	Program manager, senior project manager, project manager	
VMO Executive Champion	• Lead organizational change • Champion the VMO and agile transformation •	VP, SVP, CIO, COO, CEO	

Role	Responsibilities	Typical Titles	
EAT Stakeholder	• Set strategic goals • Remove escalated impediments • Decide to start a new investment stream or to make a substantial pivot	CIO, COO, CFO, CEO, Portfolio Manager, Project Sponsor	
Value Stream Manager	• Manage work in-take • Prioritize MMPs	Program manager, Chief Product Owner, Product Manager, Enterprise Coach	
Agile Team Representative	• Report on Progress against business outcomes • Discuss potential recommended pivots • Raise impediments that cannot be resolved at the team level • Highlight dependencies on other teams or entities	Program Product Owner, Scrum Master, Developer	

Summarize Your Value Streams

3. Follow the instructions in the table to summarize your value streams.
4. Create a draft change agenda by naming the strategy you would use to make the change, and listing the steps you would take.
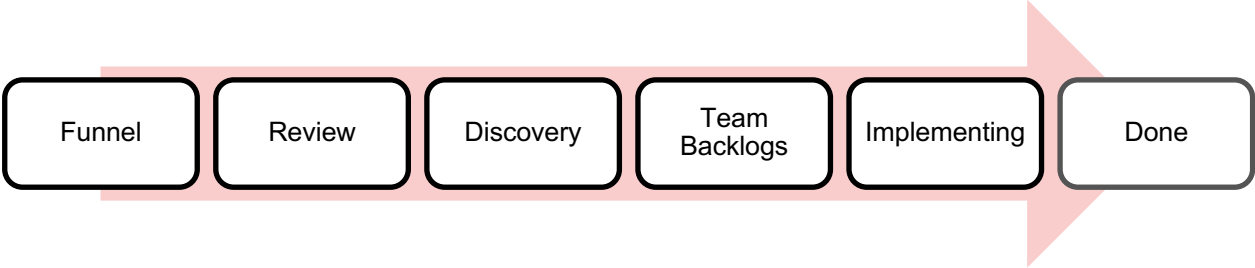
	Value Streams	Solutions	Customers
4. Summarize the value streams that are used to build the systems and capabilities that enable business processes or provide products and services to your customers. 5. What are the solutions or services each value stream provides? 6. What are the customer segments served?			

Change Agenda:

Traditional Silos	➡	Value Stream-aligned Teams

List steps needed to make this change:

Identify your Portfolio Kanban processes

| Funnel | Review | Discovery | Team Backlogs | Implementing | Done |

Define Your Funnel State

How?	What?	Who?
How can people add to the funnel?	What is the criteria for pulling into the Review state?	Who is doing the pulling?

Review

What?	Who?
What is the criteria for pulling into the Discovery state?	Who is doing the pulling?

Discovery

Who?
Who is the authority for making the go/no-go decision?

Who?
Who is doing the pulling?

Done

Who?
Who determines that the MMP has been met?

How?
How is the success criteria measured?

Portfolio Rhythm

Frequency?
How often does the portfolio team come together?

How?
How are WIP limits managed?

Governance Bottlenecks

1	Create a list of the most impactful or riskiest governance activities for your organization as it relates to product delivery
2	Prioritize that list by the process that causes the greatest delay
3	Discuss how you can effect change on the first item on the list
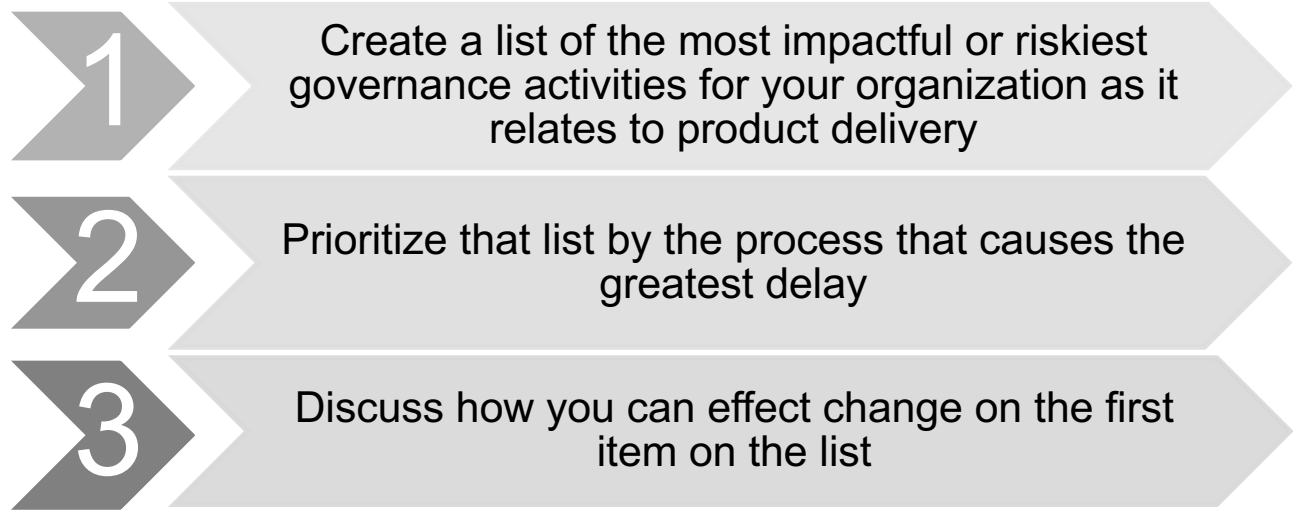
Current Governance Activities

Prioritized List

Scrum Redesign Challenge

Customization Objective:

Describe the specific goal or objectives of adapting the Scrum framework to your context. What are you trying to achieve through these adaptations?

1. Roles and Responsibilities:

Custom Role 1: [Description]
Custom Role 2: [Description]
Clarifications and Adjustments to current roles:

2. Sprint and Sprint Events:

Timebox: [Duration]
Customized Events:

3. Artifacts:

Custom Artifact 1: [Description]
Custom Artifact 2: [Description]

4. Backlog Management:

5. Metrics and Reporting:

Custom Metric 1: [Description]
Custom Metric 2: [Description]