Confluence: Introducing agile to an 160 year old company

JENNA MCLAUCHLAN • DIGITAL DELIVERY MANAGER • ICAS
Agenda

- About ICAS
- Our agile and Atlassian journey
- How we are using Confluence
- Benefits
About ICAS
JAMES BROWN
First President, The Society of Accountants in Edinburgh
1853-1864

JAMES McCLELLAND
First President, The Institute of Accountants and Actuaries in Glasgow
1853-1864

JOHN SMITH
First President, The Society of Accountants in Aberdeen
1867-1869
Our agile and Atlassian journey
How we are using confluence
Annual Renewal 2017

Created by Jenna McLauchlan, last modified a minute ago

Goal
To build a simple intuitive annual renewal process for customers and collate insights to enable ICAS to serve members relevant products and services.

KPIs
1. A renewal rate of 65% by 1 January 2017
2. A customer satisfaction rate of 65% for the renewal experience.

Objectives:
- Capture meaningful data that will help ICAS to drive engagement
- Communicate the benefits of ICAS to members at time of annual renewal
- Create a simple device agnostic user experience for customers paying subscription fees
- Reduce waste in the business process
Project team roles

Created by Anna McCauley, last modified just a moment ago

Project Sponsor: Carolyn Spencer, Director of Digital

The Business Sponsor is the project champion who is committed to the project, to the proposed solution and the approach to delivering it. The Business Sponsor is specifically responsible for the Business Case and project budget throughout. The Business Sponsor should be committed, supportive and available for the duration of the project, providing a clear escalation route.

- Owning the Business Case for the project
- Ensuring ongoing viability of the project in line with the Business Case
- Holding the budget for the project
- Ensuring that funds and other resources are made available as needed
- Ensuring the decision-making process for escalated project issues is effective and rapid
- Responding rapidly to escalated issues and being the ultimate point for resolution of conflict within the project
- Empowering the business roles within the project, to appropriate levels, within their responsibilities
- Keeping themselves informed of progress and issues, e.g. by attending demonstrations and asking questions of other roles who are more actively engaged

Business Visionary: [Name]

Business Visionaries are involved throughout the project, providing the team with strategic direction and ensuring that the solution delivered will enable the benefits described in the Business Case to be achieved. At the end of the project, the Business Visionary will own the Deployed Solution and will be responsible for the realisation of any benefits associated with it.

- Defining the business vision for the project
- Communicating and promoting the business vision to all interested and/or impacted parties
- Monitoring progress of the project in line with the business vision
- Owning the wider implications of any business change from an organisational perspective
- Contributing to key requirements, design and review sessions, particularly where aspects of the solution being considered address key elements of the business vision
- Identifying and owning business-based risk
- Defining, and approving changes to, the high-level requirements in the Prioritised Requirements List, i.e. any change that affects the broadened scope or significantly alters the balance of priorities
- Ensuring collaboration across stakeholder business areas within the scope of the project
- Ensuring business resources are available to the project as needed
- Promoting the translation of the business vision into working practice, i.e. ensuring full business adoption of the solution created by the project
- Empowering the business roles within the Solution Development Team, to appropriate levels, within their responsibilities
- Where the Solution Development Team cannot agree, acting as an arbiter of business differences related to the business need and the way this is addressed in the Evolving Solution

Project Manager: [Name]

As well as providing high-level Agile-style leadership to the Solution Development Team, the role is focused on managing the working environment in which the solution is evolving.

- Ensuring effective and timely communication and provision of information to project governance authorities (Business Sponsor, project board, steering committee etc.) and stakeholders not actively engaged in the project with the agreed and appropriate level of frequency and formality
- Performing high-level project planning and scheduling, but not detailed Sprint planning or task planning
- Collaborating with the Solution Development Team and other appropriate stakeholders to create and agree the Delivery Plan (the schedule of Project Increments and the Sprints within them)
- Monitoring progress against the baseline Delivery Plan

Supporting

Solution Development Team

Business Visionary

Business Sponsor

Project Manager

Technical Coordinator

Business Analyst

Team Leader

Solution Developer

Business Advisor

Business Facilitator

Technical Facilitator

Sprint Planner

Sprint Coach

Solution Tester

Workshop Facilitator

DDRM Coach

Project Team roles

Benefits realisation tracker

Decision log

Meeting notes

Risk log

Research

Design

Evolve solution

Decisions

Retrospectives

PAGE TREE

Project initiation document

Project team roles

Annual Renewal 2017

Blog

Meetings

Confluence - Google Chrome

App

New folder

Home - Spacex

Find Order

Spacex Extravehicular

Inside Spacex

EVENTS 2016 MASTERS

Editorial

Save for later

Others

Share
## Current Sprint

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<th>Key</th>
<th>Summary</th>
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**Next steps**

- Description
- Due date
- Assignee
- Task appears on
Reciprocal members (other bodies)

Q52 additional info

to be web pages

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**Action items**

- @Lucinda MacFarlane to provide new list of practice and business job level options for Q33 & Q36 by 16 Jun 2016
- @Lucinda MacFarlane to provide new list of sectors for businesses for Q36 by 16 Jun 2016
- @Jenna McLaughlan to consult with @Susan Findlay and @Lucinda MacFarlane on the options and wording for Q38.1 by 30 Jun 2016
- Janice Hutchinson to provide list of community interests for profile by 26 Jun 2016
- @Jenna McLaughlan to obtain sign-off from Michelle Mullen on changes to Find a CA opt-out by 30 Jun 2016
- Janice Hutchinson to pick up on GAA and reciprocal member data by 30 Jun 2016
- Carolyn Spencer to confirm that the above changes to do need to be approved by exec. by 16 Jun 2016

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**2 Comments**

**Jenna McLaughlan**

Hello all. Just to highlight that I also found the research projects question which wasn’t in the Aquila review that I’ve added to this as one to remove this is Q39.1. We didn’t discuss yesterday but assuming its OK to remove. Thanks, Jenna

**Lucinda MacFarlane**

Regarding Q15, I thought we agreed in the meeting that we should keep the secondary email address. This is vital as when the preferred email address fails, we can still communicate with the member. We only introduced the second email address a few years ago and it has had a huge impact on not losing touch and also...
Profile will ask members for one mandatory email address instead of two

Status: Decided

Stakeholders:
- Janice Hutchinson
- Carolyn Spencer
- Lucinda Macfarlane

Outcome: To collect one contact email address for members. Instead of the primary and secondary email address we have collected in the past.

Due date: 23 Jun 2016
Owner: Janina MacKinnon

Background

- Background to email address fields detailed in supporting document below:

- ICAS contact strategy focuses on making sure member data is correct and up-to-date there will be processes in place to reduce the number of inactive email addresses.

Action items

- @Stevens Fullerani to update the profile design with one email field instead of two 23 Jun 2016
- @Janice Hutchinson to ensure contact strategy includes activities to minimize out-of-date or invalid email addresses 31 Oct 2016
Benefits

Visibility
Supports culture
Reflection
Thank you!

Jenna McLauchlan • Digital Delivery Manager • ICAS