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Agile Transition of the Dutch Tax Authority
My Agile Portal for Citizens

Guiding the agile journey of the Dutch Tax Administration

Fast
Predictable
Fun
Set the stage
What’s in it for you?

• Agile transition leader?
  ➡ Insights and tips for your agile change process

• Government Manager?
  ➡ What is going to change in your role?

• Coach?
  ➡ Insights and tips for your coachings backlog.
Dutch Tax Administration
The Tax and Customs Administration NL

- **Tax Revenue**: €234 billion
  - €155 billion through direct taxes
  - €74.9 billion through indirect taxes
  - €4.2 billion through other levies

- **Benefits paid**: €10.8 billion

- **Number of employees**: 29,400
Where are we?

- Minister
- State Secretary
- Secretary-General
- Government Internal Audit Service
- Directorate-General for the Tax and Customs Administration
- Directorate-General of the Budget
- Treasury
- Directorate-General for Tax and Customs Policy and Legislation
- Tax and Customs Administration of the Netherlands (Belastingdienst)

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Our Organization in future: TOM: the model

Large Enterprises

Small and Medium Enterprises

Individuals

Benefit Entitled Individuals

Scope services

Tax information
Receiving and informing
Customer registration and management
Tax assessment and tax return
Tax enforcement
Appeals and objections
Professional competence
General Operational (incl International)
Central functions (HR, D&A, IT, etc.)
Our Organisation now

Who is responsible for what???
Where is services???

Complex

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What we deliver for our users/solution

- Portals
- Entrepreneurs
- Citizens
- Tax call center
- App
- Tax Forms
“Our Mission”

External
• Income tax: make it more easy, more compliant
• Help our political representatives to translate their promises and decisions into products
• Close Tax Gap

Internal
• Deliver earlier and more predictable, create value for citizens

Short time
Increase release frequency from 4 to 11
Services Department 2014

- Double functions!
- Gap between Information Management and SW Delivery departments
- Business far away / absent
- Designed as described
Why Agile?

- Late delivery, a lot of rework
- Not able to deal with changing (political) requirements
- Low frequency of releases
- Low predictability
Vision for transition/pilot

Customer/User request within 3 months to production

A smooth and regular process

by

Smaller & more frequent releases (10 – 12)
What do we want?

Predictability

Dedicated teams per value stream

Minimal dependencies

Pro active governance

Less rework

Business steers

Less escalations

"I understand change is inevitable, we can delay it but we can’t stop it, those who can keep up with it can benefit, those who get left behind won’t and that’s a sad thing."

Aboriginal man, 54

https://www.facebook.com/tellingitlikeitisindarwin
Agile Transition within Dutch Tax Administration

- 4 agile pilots
- 70% of teams work with (sort of) Scrum
- Lean
- Lean Coaches -> SAFe coaches
- Agile Transition: Bottom up
- Reorganization
- Pressure to improve from Dutch Audit Department
Management asks you to come with a change approach

- Starting in November 2015, please come up with:
  - A vision statement for the agile journey
  - A roadmap for 2015/2016

- What are the first things you are going to do?
- Please make it visible to the other teams.
Roadmap Transition: original

Release 1  Improve Agile Way of Work/Scrum Teams
  » DOD
  » Scrum masters
  » Product owners
  » Productmanagement
  » Set date for SAFe Pilot

Release 2  SAFe pilot My Agile Portal Citizens

  pilot = citizens, not enterprises
  increase to monthly delivery

Release 3  Agile Release Train Service department
Roadmap Transition: in June the actual

Release 1  Scrum Teams
  » DOD
  » Scrum masters: role and knowledge
  » Product owners role and knowledge
  » Project managers
  » Middle Management

Release 2  SAFe pilot My Agile Portal Citizens
           Start of ART for enterprises

Release 3  PI 2 Agile Release Train Services for citizens

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Vision of a “real” Scrum Team

• Deliver in 1 sprint of 2 weeks *releasable* products with 1 team, 1 backlog, 1 Scrum Master en 1 PO:
  › Design: Business proces design + Detail en Interaction-Design
  › Construction
  › Test (interfaces, integration en acceptance)
  › Integration -> within Service-department

• Emphasized on product backlog items, like user stories en defects
  Composition Team: fiscal knowledge, interaction design, construction and test

• Component & featureteams
How to involve management?

• Which management?
• Roles?
• Changes?
• How to involve?
• When?
Transition team works agile too

Team: Middle Management and some others
Sprints: 2 weeks
Product Owner: ?
Prioritized Backlog: not easy
Scrum board: 7 transition themes
How to involve Business?

Come up with some ideas about how to involve business!
Our Goal

Finding the right business owner:

• Who *is*, who *feels* or *who dares to claim* to be responsible?

• Let business owners drive Value Creation (very hard!) (instead of reacting on proposals, more pro-actively input)

• Invite them to system demo’s and PI planning

• Business presents business context during PI planning
What kind of coach do you need?

• Internal or external?

• Competences

• Experience

• Special experience in government setting needed?
What kind of coaches did we involve?

- Both internal and external
- Competences
- Experience
- Special experience in government setting needed?
Profile Agile Coach

Unleash Your Team

“Leadership is a journey, not a style or concept”

Agile Coach Influence Gravity Well

IT Management
External Coach(es)
Internal Coach(es)

Influence on how work is being done

Influence on the organizations goals

Scrum Team
Scrum Team
Scrum Team
To scale or not and what?

• Product?
• Number of teams?
• Dependencies?
• Value streams?
Why SAFe?

SAFe

Alignment & Synchronisation

“Blue Model” to introduce Agile

Danger

Absorbes scrum Blueprint thinking Only organization changes not culture

So is it a good idea???
July 2016: where are we now?
Timeline / scope of agile journey

2012
• Start scrummish organization
• Scrum partial implemented
• First talks about coöperation between departments (IM – Delivery)

2013
• No progress in managing interdependencies
  • Increasing (project) management intervention to make more progress in releasing products

2014
• Pilot agile MBD
  • Teams (= projects) operate mainly independent of each other
  • Top down planning

2015
• First steps to integrated approach over the teams; First steps to end accent on project working
  • Preparation SAFe/Agile approach
  • Empower Scrum Masters and Product Owners

2016
• PI 1 Portal citizen
• Business aligned
• PI 2 Portal citizen
• Implementing SAFe roles
• # releases increasing
• PI 1 Portal Enterprises
Roadmap

Q1 2016
- Training PO/PM
- Training SAFE XP
- DOD
- Feature Backlog
- Determine roles
- Involve fellow workers
- Selection RTE en PM
- Release Monthly
- System team

Q2 2016
- Pilot PI ART My Agile Portal
- Visit Philips
- Evaluation Pilot
- Continuous Integration (interfaces)
- Agile SAFe coach gets more experience as Product owner/Scrum Master
- Portfolio KANBAN
- Start 2nd train
- DOD
- Tendermanagement Commitment in new role
- Business more involved
- Zero measurement agile
- Filling in role scrum master: fulltime or not
- Agile 2016
- Establish Releasemanagement when needed

Q3 2016
- Roll out SAFe in Service department
- Plan for shifting roles: what do we need?
- Internal Coach takes step by step role over from external coach
- Involving higher management
- Involving business
Defying gravity
Lessons Learned

• Scrum master = a fulltime job

• External coaching needed

• Budget for transparency/RPM/change: screens, pc’s

• Involvement higher management

• Business involvement not sufficient

• **Be fierce and persistent in changing the waterfall**
Lessons Learned: management view (1)

• Its the chain as a whole which counts
• Participation of everybody
• Good, experienced coach is important
• Communication is key, management support
• Take a risk!
• Crucial roles needs good people
• Role of manager changes
• Keep focus on waste reduction, keep it simple
Lessons Learned: management view (2)

- Obligations flow
- Risks early visible
- Teams take work of other teams (self regulation)
- If train slows down, no problem, we see it coming
- More control and “relax”
- High(er) employee satisfaction
- Less escalations
- Transparency in chain of delivery
10-Step Approach

1. Start with management and transition team
2. Chose a pilot with sense of urgency, then expand and improve
3. Set the date for the start of the first release train and work towards it
4. Start with a cope you can handle and let grow
5. Let the organisational impediments raise, then one by one deal with them (management!)
6. Let people architect and carry the change with guidance
7. Don’t avoid conflicts (very hard!! Culture)
8. Let people discover themselves whether their role changes and how
9. Keep management and project management out of the train but replace with new roles
10. Work with scrum masters for the change
9 tips for transition leaders

Do not manage but lead
Let teams solve their own problems
Foster teams
Show agile behaviour, be agile yourself
Trust

Go see with own eyes
Stick together (with the other managers) in the chain
Embrace: the agile transition is a change.
We don’t know everything upfront
Embrace the agile manifesto
Our Magic Moments

Dick: learning by doing.
Learned to give confidence, let loose!
Wrap UP

• What are take aways for your own backlog?

• Do’s and Don’ts?

• Would you like to hear more?

Lets talk!
Tot ziens!