Transforming Mindsets to Accelerate an Agile Transformation

RANDY WILK, MetaBank
JOHN MARGETIS, Cprime
Who

• MetaBank is an innovative financial services provider, creating, delivering and sponsoring financial solutions.

• Operating in several different financial sectors including community banking, national lending, payments and tax services, MetaBank works with niche industries, strategic-growth companies and technology adopters to grow their businesses and build more profitable customer relationships.
MetaBank had previously undergone an Agile transformation 2 years earlier, and while there were mechanics of Scrum in place, many team members had reverted to legacy cultural behaviors.

In August of 2018 we undertook a re-transformation to Agile.

Each team had an Agile Coach join them for to attend all their ceremonies and provide the team individualized coaching.

We created a plan based on best practices and brought on Agile Coaches from Cprime to accelerate our transformation.

We held a weekly Coach’s retrospective where we identified common issues and discussed how to address them and keep teams on track.
Problems

- We were aware of the need to change behaviors and were consistently having to challenge and coach.
- Recurring topics in the Coaches’ retrospectives were common types of legacy and culture thinking.
- We classified the most prevalent legacy mindsets to come up with a plan to change them.
Hero Mindset

- Someone who wants to completely own a set of work to themselves
- Who wants to control everything around that set of work, so when the work is done, they can be the hero that delivered the work
Order Taker Mindset

- People who do work in exactly the way it’s asked regardless of whether it makes sense or not
- People who do not ask questions or challenge assumptions
Fatalistic Mindset

- Someone who gives up or gives in before they’ve even started
- Someone who will not raise or escalate issues or impediments because they’ve already decided nothing will be done about it
Waterfall Mindset

• Team members who only work on tasks identified for their primary perceived role, resisting collaboration
• Team members who refer to tasks as belonging to people in another perceived role
• Hesitation to being transparent at standup, and even exhibiting resistance to swarm work and integrate early & often
Role Identification Mindset

• Someone with specific subject matter expertise who hoards and **does not share that knowledge**, regardless of whether that expertise relates to a domain, role, or toolset

• Someone with specific subject matter expertise who:
  • Evangelizes individual vs. collaborative ownership of work
  • Exhibits unwillingness to learn anything that is perceived to be outside of their "role"
Component Mindset

- A person or team only concerned with the tasks at hand, that does not look outside the team or project to get a whole system view
Quick and Dirty Mindset

- Someone who’s only concerned about getting to the end, without regards to quality or technical debt
As we finished training the last Scrum team and were coaching teams, it became time for our annual setting of corporate performance goals.

Recognizing that there was legacy culture that needed consistent reinforcement to change, we made the decision to make the performance new ‘Agile Mindset’ goals.

The idea is that these goals provide consistent topics for discussion and coaching in one-on-one conversations between people leaders and their team members.

We deliberately created our goals as observational, rather than specific or measurable.
Legacy Mindsets
- Role identification mindset
- Hero mindset
- Waterfall mindset

People

Strategic Themes

Operational Efficiencies
- Fatalistic mindset
- Order taking mindset

Agile Goals
- Cross-functional learning and training
- Focus on quality, reduce technical debt, reduce customization

Reduce Technical Debt
- Component mindset
- Quick and dirty mindset

Financial Management
- Fatalistic mindset
- Order taking mindset

Do the right thing, be empowered, demonstrate creativity
Predictability, Improve the Company’s ability to Plan
<table>
<thead>
<tr>
<th>Corporate Strategic Theme</th>
<th>Individual Contributor Mindset Goal</th>
<th>Examples of how to Achieve Goal</th>
<th>Legacy Cultural Mindset to Change</th>
<th>People Leader Mindset Goal to Reinforce</th>
</tr>
</thead>
</table>
| People                   | Cross-functional learning and training | Identify new skills or roles you’ve learned over the year  
Identify new domains, tools or technologies you’ve learned over the year  
Give examples of when you’ve taught a team member something new | Role identification mindset  
Hero mindset  
Waterfall mindset | Assess and build needed skillsets needs of the Enterprise, lead communities of practice to focus on needs of the Enterprise, focus training and seminars on shared tools and skills |
## Initial Results

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Cycle Time Per Story (days)</td>
<td>10</td>
<td>5</td>
<td>-50%</td>
</tr>
<tr>
<td>Average Team Throughput (hours/day)</td>
<td>7.8</td>
<td>22.6</td>
<td>190%</td>
</tr>
<tr>
<td>Average Project Cycle Time (days)</td>
<td>273</td>
<td>204</td>
<td>-25%</td>
</tr>
<tr>
<td>Team Efficiency</td>
<td>16%</td>
<td>40%</td>
<td>150%</td>
</tr>
</tbody>
</table>
We’ve seen a big improvement in collaboration, through teamwork and team members swarming on issues to get things done

Director of Compliance, MetaBank
Noticeable immediate improvements in cycle time and performance send a clear message – embarking on an Agile Transformation in a “mechanical” way without transforming cultural mindsets and behaviors will not yield desired returns.

Leveraging the existing annual goals performance management framework has proven to be an effective way to accelerate the desired results, in our opinion.

We see this approach as a great tool for the people leaders to have regular discussions about the progress each team member is making.

We believe by institutionalizing these behaviors in the annual goals, we aim to minimize the potential of introducing conflicting priorities between our new direction and legacy momentum of the past.
Thank you!

RANDY WILK, MetaBank
JOHN MARGETIS, Cprime