Enterprise Big Room Planning at Scale.
- and what we’ve learned in 18 iterations

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Note: This is not to scale. We think New Zealand may be bigger.
Our vision is to be one of the world's great service companies, helping our customers, communities, and people to prosper and grow.
Key Learning

Find Me!
What Led Westpac NZ to doing PI Planning.
Our Journey.

Q1  90 Participants

1 Programme

All Tech

Participants

Q1  270
Q2  312
Q3  356
Q4  391
Q1  451
Q2  463
Q3  475
Q4  498
Q1  567

Consumer Digital Programme – Experiment with Big Room Planning (BRP)

Silo + Dependencies ≠ Flow

CIO joins

No Trust = Focus on Culture

Tech & Business, Delivery go AGILE - Enterprise BRP Launched

Tech Radar

2nd Programme - "Products" adopts BRP

Retros for BRP

Risk Booth

Showcase

Experience Hub 800+

BRP 1

All Tech + Risk, Legal, Business


Key Learning

2014

2015

2016

2017

2018

2019
“Dogma is the enemy of learning”
Dawie Olivier, CIO Westpac NZ Ltd.
Problem(s)

- High Level of Tech Debt = High Level of dependencies
  - 2 Apps. : 1 Eng.
- Audit & compliance
- Bottom - Up agile = challenges to synchronisation & momentum
- Project funded vs. capacity = increase in hand-offs
- Scale was 10% of Technology
- Wellington
  - 643km
- Auckland
- Maintain Group reporting alignment
- To long to deliver customer value
Big Room Planning (BRP).

“A scaled event incorporating agile values to allow multiple teams to synchronise and create a clear plan for the period ahead” - Westpac NZ Ltd.

Agile Value
We value individuals and interactions over processes & tools

Agile Principle #6
The most efficient and effective methods of conveying information to and within a development team is face-to-face
What makes a successful PIP?
Our Setting Up Education Context and Vision Team Spaces S2 and S3 Visualisation Playbacks Feedback Iteration Event of Big Room Planning
2015

Leadership

Teams

Tell us how?

Stakeholders

Not so sure about this...

Executive

Classification: PROTECTED
2018

Leadership

My Team is ready!

Teams

Stakeholders

It’s great to be involved?

Who else needs to be involved?

Executive

Key Learning
Education Overview

Basics

Themes

Learning Organisation

Adaptive

Change it up
What we thought people wanted to hear.

+ Purpose
+ Vision
+ Special Guests
+ Agenda
+ Word from Leadership

½ Day Of Blabla
What we people want to hear

+ Purpose

+ Vision

+ Agenda

1.5 hours

Key Learning
Less Hui
&
More Dui(ng)!
Tips and Tricks for Teams

Stakeholder feedback informs Day 2 planning

Day 2

Chapter/Community Huddles & Ice Breaker Exercises

Reflect feedback in plan

Second round planning

Second and other internal feedback loop(s) to challenge sequence of work

Playback 1

First external feedback loop to challenge sequence of work

Post Playback 1

Playback 2

Second external feedback loop to challenge sequence of work

Agenda as per Playback 1

If your plan hasn’t changed on Day 2 or stakeholders/sponsors haven’t asked questions of your objectives, you aren’t asking enough/the right questions:

• Which pieces of work hold the most risk? This could mean unknown parts, a high level of difficulty, lack of skills to do the work, multiple stakeholders attached to the work, etc.

• How can we align our sequence of work to minimize hand-offs?

• For each piece of work include a stakeholder or another team, how confident are we in availability/reliability?

• For each piece, what could stop us from going ahead and starting the work? What action are we to take to solve this?

• How does this sequence of work fit into what we do (e.g., Training/Learning innovation, P2, continuous improvement, other systems maintenance, other projects)?
Team Planning Overview and Capacity vs Load

Key Learning

Pre Event

During Event

Capacity: use empirical evidence
Load: Be sure to adjust for leave + holidays
Scaling Planning

S1: Squad board

S2: Release Train board

S3: All of Technology

Flow of Issues

→ Flow of resolutions
e.g. Changes to process, transparency, de-centralisation of authority
From...

Big Room Planning  ➡️  Delivering Value
Visualisation.

**Key Learning**

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**Working Agreement:**
- Dependencies are placed at the left of the feature it is linked to.
- Participants must be replaced by another squad member if absent.
- The board must be updated before the start of the meeting.
- Risks placed on the board must be categorized on the ROAM board.
- Discussions exceeding 3 minutes are to be taken down as actions (to be discussed after the meeting).
- Finished items are to be tagged with Done.
- Confidence tags are to be attached to the sprint and reflects team confidence.
- Participants must place all releases on the board and write down which consumer outcome it fulfils.
- Feature, milestones & dependency Cards will be typed and printed in duplicate copies.
Visualisation.
Overview.

Key Learning

3 min

2 min

Valuable
Program Objectives.

Confidence Levels
Westpac uses a feedback app to increase participation and capture feedback from the crowd (teams and stakeholders) during the end of the day playbacks.
PIP PLAYBACK CONTENT GUIDE

1. Program Increment Goals
2. Customer Experience that is provided
3. How this is aligned to the organisational strategy
4. The main organisational risks
5. The main delivery risks and dependencies, and score of confidence according to these
6. Q&A from stakeholders
Feedback in our DNA.

WHAT WENT WELL

- Day 1: Learnt new tips & tricks
- Intro was nice & brief
- Consumer Village was large & felt spacious
- Playbacks questions eg: What were the main takeaways?
- Standardisation for Q2

Improvements

- Poorly planned compared to previous iterations
- Started too late
- Bed was back of room, both days. Need a feedback
- Improvements were made to the overall experience
- Room was too cold
- Room was too small
- Not enough wall space
- Too many boards were flashing around at different times
- Too many people not enough wall space
- Room is squashed in
- No wall space
- Could have P1/P2 in one day if we had less speakers & more topics
- Room was too small
- Too many boards
- Having to replicate cards for each board
- Taking too long to playbacks
- Coffee kept running out
- Need more COFFEE!
- 30 min delay in catering cost exponentially more than the cost of missing
- Menur wears round, nice good brown good

Key Learning
Squad Rhythm & Routines.

Iteration
- Feedback
- Playbacks
- Setting Up
- Education
- Context and Vision
- Team Spaces
- S2 and S3

Quarterly Showcases

Vision Setting and Program Priorities
- Engineering Syncs
- PO Syncs

Catchball
Where to Next.
Our Journey.

Experience Hub

Value contribution over Position

Tribe & Chapter Design & Implementation

Review Rhythm & Routines, like BRP

Top down/Botom up quarterly objective setting, new BRP format

What did we learn?

2019 Q2 Q3 Q4 2020
The four reasons why we are adopting the new “Westpac Way of Working”

#1 Customer Experience | #2 Employee Engagement | #3 Embracing digital | #4 Faster to yes
• Iterate forward without losing what we have learnt and value.
• Iterate together with empathy, consideration and inclusion.
• Iterate forward to minimise dependencies
• Increase in people from ~560 to ~800+
• Venue & logistic challenges - “does it make sense to do it all together?”
• More people together in one place – “does business risk increase?”

• Iterate cadence & synchronisation – “If we aren’t all together, how will we stay in sync?”
• Iterate visualising xTribe dependencies and impediment resolution.
• Establish principles for visualisation standards
• Support our people to learn & grow
• Create a safe environment for our people to learn & grow.
• Encourages our people to have shared responsibility for WWoW.
Key Learning

How many did you capture?
Can you call them out?
Key Learnings.

- Focus on Culture to counter lack of trust
- Less Hui (talking) and get to planning ASAP
- Don’t be cheap! Use 3M Post-its
- Format will sink or swim your Playback
- Share the load when organising the event
- Teams need to master Capacity Planning
- Continuously invest in standardising visualisation
- Slido for Collaboration and Q&A
Key Learning

Go to slido ...
Thanks.