

## Case Study

# Distributed Agile: A Success Story

Ontario Teachers' Pension Plan (OTPP) has embarked on a modernization of its pension benefit administration systems. Intelliware was selected as a partner in the modernization effort for their expertise with Agile delivery methods and experience with OTTP's technologies of choice, a local presence, and their team-based 'build software solutions together' approach.

## The Challenge

### Creating a Distributed Agile Co-Team

Even though both organizations are located in Toronto, the physical distance between Intelliware's downtown office and OTTP's North York headquarters made typical Agile co-teaming somewhat difficult. Without an open, focused, and cross-functional Agile environment, the program had to find ways to enable multiple Intelliware and OTTP work streams to deliver concurrently.

## The Solution

The challenge of distributed Agile co-teaming required a number of unique approaches to working together.

### Virtual desktops for delivery

Virtual desktops were established for all Intelliware team members at the outset of the engagement. OTTP and Intelliware worked together to establish proper resource allocations for the different team functions, including network support requirements and necessary tooling.

### Regular online discussions & rituals

Some regular Agile rituals that take place inside a traditional team room were virtualized, allowing team members at both locations to participate. The first of these was a morning co-team stand-up, initiated by the Intelliware team.

A second ritual, specifically adopted for this engagement, was a per sprint co-team retrospective.



This retrospective was run primarily as a conference call, with an added screen-sharing aspect used to simulate the “good/needs improvement/try board” commonly used in these sessions. As the program progressed, sprint planning + backlog review sessions (conference call, screen sharing) were also added to each project stream to accommodate the identification and discussion of unplanned work, enhancements and refinements, as well as other discussion points as they emerged.

As the engagement has progressed, various online rituals were modified into primarily face-to-face discussions. While the online versions of these rituals were valuable and reduced the travel costs and team work hours needed for physical meetings, there was no substitute for frequent, co-located, and face-to-face contact and collaboration.

“Intelliware was selected as a partner in the modernization effort for their expertise with Agile delivery methods.”

## Regular face-to-face time

Face-to-face touchpoints between members of the entire team were established, ensuring that the teams spent time communicating at a group level during each sprint.

Two regular events were a sprint story review session held at OTPP offices that allowed the entire co-team to review the specifics of upcoming iteration deliverables, and sprint story tasking held at Intelliware offices where the implementation plan for each story was agreed upon and finalized.

Sessions were scheduled to maximize in-person availability, giving the entire co-team opportunities to spend time together. This time together enabled spontaneous discussions / whiteboard sessions to take place organically during each sprint.

Following the completion of each work package, OTPP and Intelliware held a quarterly “summit” meeting to review the engagement, brainstorm ideas for improvements, and discuss emerging program topics as a complete group. These summit sessions were always paired with a celebration/social event, to continue building relationships across teams and between the organizations by celebrating milestone successes.

## Online tools for information sharing

Shared instances of [Jira](#) and [Confluence](#) (hosted inside the OTPP environment) were used to communicate everything from sprint status and project scope parameters to detailed functionality investigations, team policies, and co-team absences.

[Git/Github](#) was used as the central code repository for Intelliware deliverables, as well as sharing (and in some cases enhancing) shared OTPP libraries and services.

An OTPP instance of [HipChat](#) was used for online discussions across the teams, where virtual conversations could be held in public chat rooms, simulating, as best as possible, the free-flowing conversations native to the ideal Agile team environment.

[Crucible](#) was used as the collaboration tool for team code reviews allowing all deliverables to be reviewed by both organizations, with the goal of confirming that OTPP’s quality standards were met.

## The Result

The results of this program so far have been very positive. Working together within the OTPP network environment has resulted in a consistent codebase, eliminating the need for bulky, and potentially risky, code migrations from Intellware to OTPP.

The regular touchpoints, both virtual and in-person, are allowing those involved to develop the kinds of personal relationships that are critical to team cohesion and long-term success. Finally, using a single central set of online tools to share information policies and status updates has helped simulate the effects of posting information publicly in an Agile team room.

When combining two organizations' models of Agile development, it's important for all parties to remain open-minded and collaborative, as there are lessons to be learned.

The Agile model that will best support delivery needs to be molded to the specifics of the engagement; the organizations, the cultures, and, of course, the solution.

Although rolling out a model like this requires creative solutions that focus on the intent behind Agile principles, Intellware and OTPP have proved that distributed Agile is both manageable, achievable and effective.

## Key Findings

Several key findings were identified that will assist future engagements.

Hosting Intellware inside a Virtual Desktop Infrastructure environment is beneficial for the following reasons:

- All code and documentation remains inside the client environment.
- Co-team members are able to work in a variety of physical locations while sharing a single virtual environment.
- The need to migrate source code from provider to client is eliminated, mitigating the risk of lost intellectual property and minimizing potential security breaches.

“In-person meetings of large groups, while expensive time-wise, are critical to building relationships at every level of the co-team, thus maintaining connectivity between the organizations.”



## About Our Client

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The Ontario Teachers' Pension Plan (Ontario Teachers') is Canada's largest single-profession pension plan, with \$180.5 billion in net assets at June 30, 2017. It holds a diverse global portfolio of assets, approximately 80% of which is managed in-house, and has earned an average annualized rate of return of 10.1% since the plan's founding in 1990. Ontario Teachers' is an independent organization headquartered in Toronto. It's Asia-Pacific region office is in London. The defined-benefit plan, which is fully funded, invests and administers the pensions of the province of Ontario's 318,000 active and retired teachers.

## About Us

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Intelliware is a custom software development services provider based in Toronto, Canada. Using an agile approach, Intelliware offers high velocity, reliable software services to deliver high quality software for its clients. Intelliware is engaged as a technical partner by a wide range of local, national and global organizations in sectors that span Financial Services, Healthcare, Retail and ICT.

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