



CO-OPERATORS LIFE INSURANCE COMPANY INCREASES VALUE AND AGILITY WITH DISCIPLINED AGILE

Company Background

Co-operators Life Insurance Company (Co-operators Life) is a subsidiary of The Co-operators, a Canadian multiline insurance provider with more than \$41 billion of assets under management. Co-operators Life provides Life and Health insurance, as well as Wealth Management products, to individuals and groups across Canada. Co-operators Life IT department (120 employees split between two geographically dispersed locations), provides IT services to 4 lines of business.

Prior to adopting Disciplined Agile, the organization ran isolated agile pilots based on Scrum and Kanban, but were still predominantly “project based” using a waterfall methodology, and structured in “role siloes” (BA’s, Developers, Project managers).

In 2016, the Co-operators Life IT leadership team recognized a need to rethink its initiative delivery model to provide greater value and agility to its business partners. Disciplined Agile Coaches were brought in to do an assessment of the

current state and to provide recommendations for improvement.

Disciplined Agile Transformation

Following assessment, the IT leadership team decided to move forward. An internal “core agile transformation” team was created and worked hand in hand with Disciplined Agile Coaches to create vision, target state, success criteria, investment plan, communication & change plan for the transformation. Many specific changes were identified:

1. Need for reliable delivery to commitments
2. Need for long term x-functional teams to develop into trusting high performance teams
3. Need to bring work to teams instead of creating new teams for each new initiative
4. Improvement of intake process by implementing prioritized backlog of high value work for each LOB to feed delivery teams

Recognizing that the transformation would heavily impact culture and people, Disciplined Agile Coaches were asked to help lead 2 key areas:

1. Organizational communication, training, and transformational change management
2. Agile pilot team coaching

Organizational communication, training and transformational change management

Disciplined Agile Coaches conducted intensive training and coaching sessions for key IT leadership at all levels to ensure alignment and commitment to the Agile Transformation. Coaches provided an additional six months of external embedded enterprise agile coaching to help the organization implement Disciplined Agile. In parallel, Disciplined Agile Coaches ramped up communication to all stakeholders, including IT staff, IT leaders, line of business executives and senior executives to help demonstrate the overall vision, the expected benefits, the change that was happening, and to document and share successes. A Lean Change organizational change management (OCM) approach was used to introduce, track, and communicate all aspects of the agile transformation. Information radiators (big visible charts) were posted in public areas to ensure complete transparency of the vision and its guiding principles.

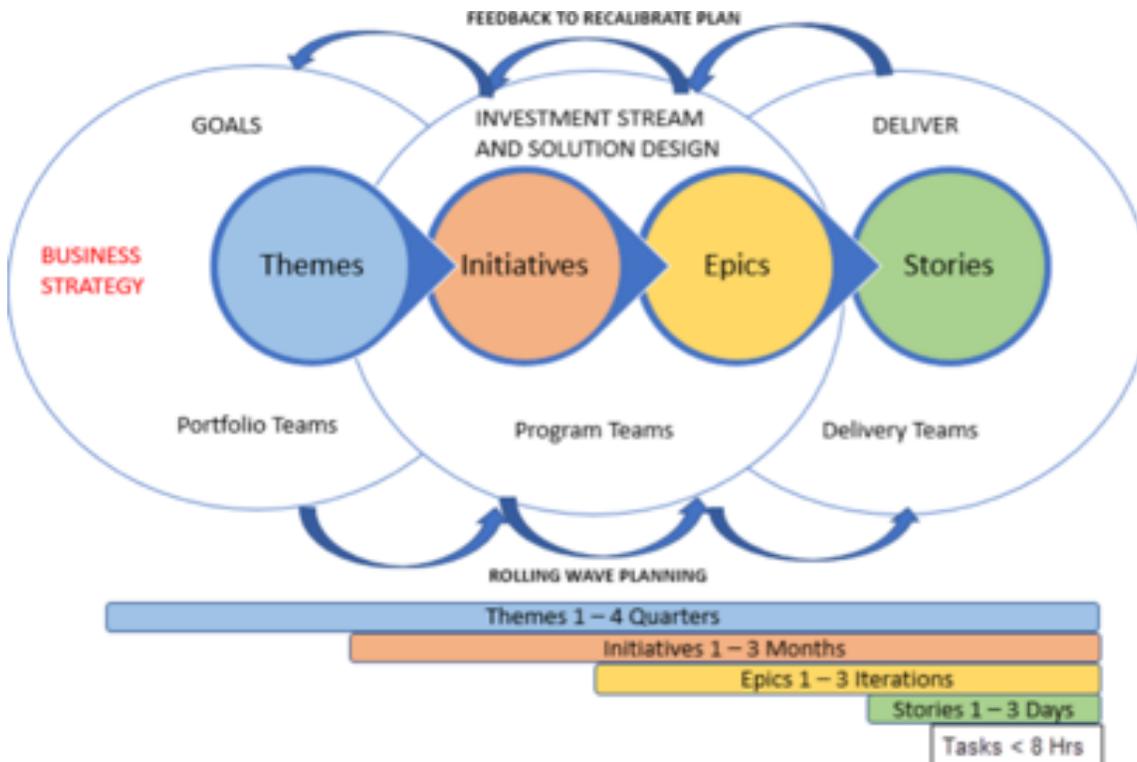
Agile Pilots

Three initiatives were initially targeted as agile pilots. We provided training/coaching to support these teams. The pilots provided learning & created support and commitment to the new methods. Other new initiatives struck in 2016 / early 2017 followed the same agile pilot model, building momentum within the IT and business areas.

Accelerated Delivery Using Realigned Teams

As part of implementing one of the new guiding principles, in 2017 IT leadership re-organized into long lasting x-functional teams that aligned to the lines of business. With the assistance of Disciplined Agile enterprise and team coaches these new teams began delivering work using the Disciplined Agile toolkit.

At the end of 2017, the IT organization had eight feature teams, three component/services teams, and one support team. Together with the LOB's, they reviewed business strategy, created resulting major themes, initiatives and epics which are then handed to delivery teams to execute as manageable stories. Continuous feedback was used to recalibrate plans.



The Results

This is an evolving journey. To date the IT department and partners have seen:

1. Improved visibility / transparency of work
2. Increased trust and collaboration as product owners and IT teams work together longer term
3. Increased delivery predictability
4. Reduction of waste, handoffs, and useless documentation.
5. Solutions that better meet actual business needs
6. Greater commitment to continuous improvement

All work completed by Co-operators Life IT organization is now based on the Disciplined Agile toolkit, supported by internal coaching. The broader company is now considering extending the framework to other areas.

“Our integration initiative has been managed using an Agile approach with the work managed, prioritized, and delivered in TFS. As a Product Owner, I’ve had continuous access to the state of development efforts and immediate visibility into any project challenges that have arisen. Without applying agile practices, Phase one of the project would still be in progress. Highly recommend Disciplined Agile.”
—Product Owner, Integration



About Disciplined Agile

Disciplined Agile is the industry-leading approach to help individuals and teams make informed choices, improve their way of working, and help organizations streamline agile and leans strategies to make better decisions. Certified Partners and Coaches provide a customized experience to help optimize IT solution delivery for true business agility. Companies increasingly depend on certified Disciplined Agile coaches and our Partners to accelerate delivery of business value using disciplined agile strategies that reflect the realities of agile delivery in complex enterprise situations.