• Lived Experiences as a Basis for Transformational Change (Agile Business Requirements)

• Momentum as a Necessary Aspect of Transformational Change

Better Tomorrow
• Organizations Where We Work

• Communities Where We Live

• Our Public Institutions
What does it all mean?

Do what is possible

+Incrementally

Add engagement threads and start to engage Stakeholders widely

You are already part of the Change Programs in your Organization

Make Requirements, Roadmap and Requirements Backlog Agile

Do the Necessary

Empowered

Your teams are working with teams from across the industry solving community challenges Together

Before you know you’re doing the Impossible

a Network of Servant Leaders for a Better Tomorrow
Engagement Question #1

So what is your Take?

[select one]

1: Jason, you are a dreamer
2: Sadly, the world doesn’t work that way
3: At my company, we are trying to get through the day
4: We are so siloed and narrowly focused, don’t even know where to start.
5: Other (please elaborate!)
Transformational Change

WS 306: [Roadmap, Backlog & Execute] AGILE

Nov. 15, 2023

If you want to go fast, go alone. If you want to go far, go together.

-African Proverb
Socratic Questions for this Workshop

1. What does (should) a Roadmap for a Transformational Change consist of in - Organizations, Communities, and Public Institutions

2. Managing Agile and Three Project Management Constraints - Cost, Timeline, and Quality

3. Everything we discussed so far makes sense, but how do I get started?
About Me

Major-Jason Uppal, P.Eng. 10 years as Manufacturing Engineer, 20 years as EA and SA

I was Open CA L3 certified and TOGAF Practitioners since 2004


Work for WhiteSparrow Labs and Solution Architect consultant on a Transformational Program in Canada
Servant Leader Workshops
• Learn by Doing

WhiteSparrow Platform
• Platform to industrialize the Transformational Change
• You don’t have to sign up, you will get more value if you do,
• It is free

Educational Material
• Guidebook augments these workshops (if you are interested in participating in guidebook development, do let me know).
• Course slides – adjust and run your own courses

Authority
• All opinions expressed are mine as a WhiteSparrow Labs team member and I do not represent – AEA, The Open Group, or any other company.

Content Collaboration ***
• Google Drive
• Anybody wants to participate, reach me, will happily grant you the editor access
Course Goals

- People can not stay engaged without Results

Scope

- Paths, Milestones and Roadmaps
- Backlog of Work to Reach Milestone
- Paths for Different Types of Transformational Programs
  - Organizations
  - Communities
  - Public Institutions

Results

- Upon successful completion –
  - Should have a deep understanding of how to be agile and work along a planned path.

- Successful completion criteria
  - Attend and participate
  - Complete assigned work
  - Run your own project – learn by doing

Path Forward to Help Make a Difference
Transformational Change

WS 306: Roadmap, Backlog and Results

Topics
- Module 1: Brief Review of First Two webinars
- Module 2: Terms and Transformational Change Processes
- Module 3: Roadmap Process for our Scenarios
  - Organization
  - Community
  - Public Institutions
- Module 4: Getting Started
- Next & Last Webinar: Showcase
Brief Review of First Two Webinars

*Business Requirements & Momentum For Change*

- **Organization**
  - Opportunity
  - Stakeholder & Engage
  - Lived Experiences
  - Build Momentum for Change

- **Community**
  - Observations
  - Engage
  - Lived Experiences & Momentum
  - Define the Opportunity

- **Public Institutions**

- **Next Roadmap**

**Mod 1**

Transformational Change
Mod 2

Terms In Transformational Change Processes

Transformational Change
- change that benefits all involved.

Opportunities Observations
- defined as a strategy or observation to do better or unfair practice

Backlog
- set of things to do for each milestone

Milestones & Roadmap
- roadmap has start and end conditions, milestones along the road that matter

Agile
- selected things to do for target milestone

Project
- start, end and precise scope

Execute Change
- do the things – whatever the thing to do is
Terms and Transformational Change Processes

Path & Roadmap: Organization

- Strategy
- Lived Experiences
- Data Points
- Engagement & Momentum
- Tasks to do
- Selected Requirements & Execute Change Project
- Architecture Change & Requirements
  - Tasks to do
- Data Points
- Goal Achieved
Mod 2

Terms and Transformational Change Processes

Path & Roadmap: Community

- Observation/Opportunity
- Lived Experiences
- Engagement & Momentum
- Roadmap and Backlog
- Define Opportunity
- Arrival
Engagement Question #2

When was the last time you created a roadmap for an Opportunity?

(select one)
1: less than three months ago
2: less than 6 months ago
3: less than a year ago
4: Never
Engagement Question #3

What was most challenging when creating a roadmap?

[Select  More than One ]

1. Establishment of Paths
2. Establishment of milestones
3. Establishment of the backlog of items to do under each milestone
4. Stringing together Paths and Milestones to reach the target state
5. Other – elaborate
Recap Moment
Data Points

Paths, Roadmap, Milestones, Backlog of Work, String together and Deliver Outcome

Bring these Data Points together
Mod 3

Transformational Change Scope & Methods

Organizations

Opportunity

People Centric
- Example: New Labour Contract
- People need to become aware

Methods
- Stakeholder Mapping

Process Centric
- Example: Data Governance
- How we manage Volunteer Hours in Schools

Methods
- Activity Based Analysis

Information Technology
- Example: Upgrade SAP ECC to S4
- Social engagement platform (like WhiteSparrow)

Methods
- TOGAF®

Strategic Engineering
- Example: Reduce Cost of Manufactured Part
- Solar Power

Methods
- Industrial Engineering
Mod 3

Scope: Organization Where We Work
Strategy: Enterprise Data Platform

Transformational Change

Legacy Data Warehouse, Business Silos

Technology Platform
- Install/Provision
- Integrate

Procure Technology Platform

Re-Engineer Information Needs

Predictive Analytics

Educate Business SME
- Technologies Capabilities

Center of Excellence
- Mature Data Management Practices

Build Capacity
- Integrate People & Process

Rethink Information Needs and Provisioning
- Information Usage

Business Cases
- ML and Business Value

Educate Business SME
- Technologies Capabilities

Enterprise Data Platform

Center of Excellence
Mod 3

Scope: Organization Where We Work
Strategy: Enterprise Data Platform

Technology Platform
- People who build and support technology platforms
- Data Governance

Re-Engineer Information Needs
- People who consume Operational and Analytical Reports
- To understand the needs of customers and communities

Predictive Analytics
- People who plan for the future – customers and communities

Organization’s Needs

Team’s Needs

Stakeholders

Engagement Threads

How about - cool technology - opportunity to share new skills across the org and industry

How about - access to information when you need - challenge how our enterprise information can be used to support CSR, ESG

How about - Demystify Machine Learning
Scope: Community Where We Live
Observation: Carbon Neutral and Sustainable Development

Transformational Change

Stat with Observation

Solar Power @ Farms

Commercial Gardens

50K Menu Item

Sustainable Development Fewer Carbon Emissions than today
Scope: Community Where We Live
Observation: Carbon Neutral and Sustainable Development

Stakeholders
- Solar Power
  - Farmers, Installers/Electricians

Commercial Gardens
- High School age children living on Farms
- Consumers
- Delivery

Engagement Threads
- Other than Cost, what are other obstacles

50k Menu
- Understand Delivery (Supply and Demand) Constraints

50K Menu Items
- Local Restaurant Owners
- Public Awareness
Scope: Public Institution
Observation: Volunteer Hours and Useful Skills

Program Detail
- Program Content
- Marketing Content

Deliver Programs
- Identify and execute change opportunities

School Admin
- Communicate Value of the program
- Partner with Current Org

Purpose & Carer Path

High School
Mod 3

Scope: Public Institution
Observation: Volunteer Hours and Useful Skills

Develop Programs
- School Admin
- Org that do business with schools today
- Parents

Stochastic Workshops
- High School Students
- Program Requirements Admin

Stakeholders

Engagement Threads
- Volunteer Hours & Career Paths
- Learn how to Make Change Happen
- Start your first business before graduation
Join WhiteSparrow Network

Join us on the Monthly Mentoring call

Explore your Own Opportunity/Observation

Start with an Observation
Like Minded People
Use the Platform (if you want)
Join us on the Monthly Mentoring call

I Understand what you are saying, how do I get Started?
Engagement Question #4

Did these webinars help overcome the Business Requirements Challenge for Transformational Change Programs?

(Select One)

1. Yes
2. No
3. Yes, But
Summary

Questions for Today

- Roadmap Elements
- Three Project Management Constraints
- Call to Action – How to get Started

We Solve

- Start with what is necessary
- Do the Possible
- Suddenly you are doing the impossible

Milestones and Roadmap

Call to Action

Access to PPT and Recording on AEA Site

Transform what you see around you? Get help!
Next Webinar
Dec 13, 2023
11 am to 12 PM EST

Strategy: Enterprise Data Platform

WS307
Transformational Change - Share & Learn

Business Context
During the workshops, we will use three scenarios to gain hands-on experience. The learners can enhance the shared content and/or develop similar content for their opportunities. This workshop provides a platform for learners to share their content, get feedback and possibly build their team to take the opportunities for change further.

Workshop Agenda
- Presentation - 60 min
- Opportunity and Presenter - TBD

Learning Goals
- Share and Learn

Resources
- Opportunity and Engagement Threads
- Lived Experiences and Business Needs
- Strategy to Build Momentum
- Roadmap and Agile Plan

From Audience
- if anybody wants to share their experiences – please do reach out to me
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