



Managing Multi-Site Development Teams

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Director Development CTS Sunlife

About me

- TSSG 2001-2003 MSc
 - Research Assistant
- Eontec/Siebel/Oracle 2003-2004
 - Graduate SW Engineer
- Sunlife Financial 2004-Present
 - SW Engineer
 - Senior SW Engineer
 - Associate Director IT
 - Director IT

About Sun Life Financial

- International provider of financial products and services.
CAN\$891 Billion assets under management.
- 151 years in business.
- #1 provider in Canada; #6 in US; rapid growth in Asia.
- 30,000 employees across 17 countries.
- 380 in Waterford supporting the US and Canadian businesses.



Sun Life Products & Services

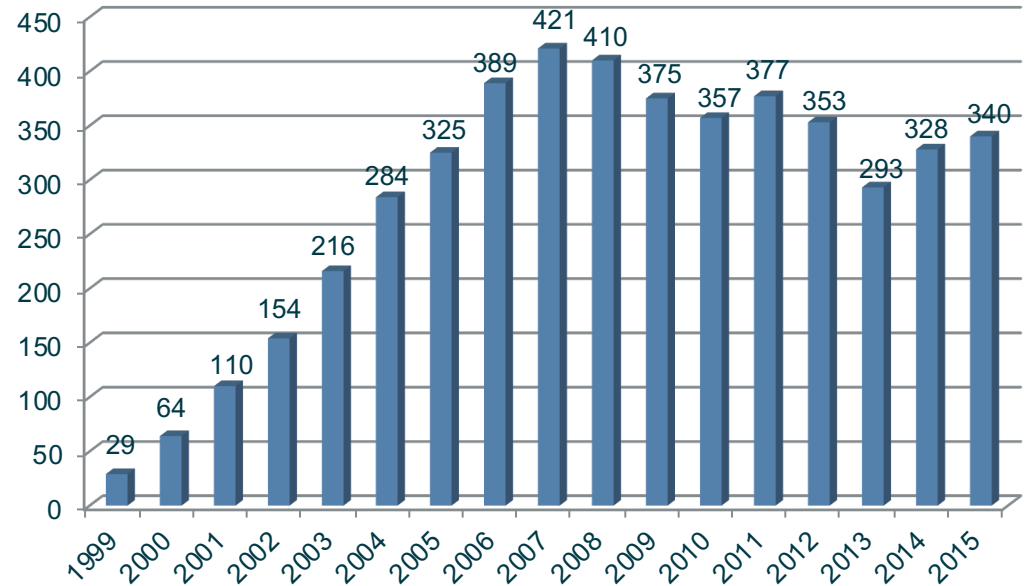


- Financial Planning & Advice
- Life Insurance
- Health, Dental, Accident and Disability Insurance
- Investment and Retirement Savings
- International Life Insurance & Investments for High Net Worth Individuals



Sun Life Financial in Ireland

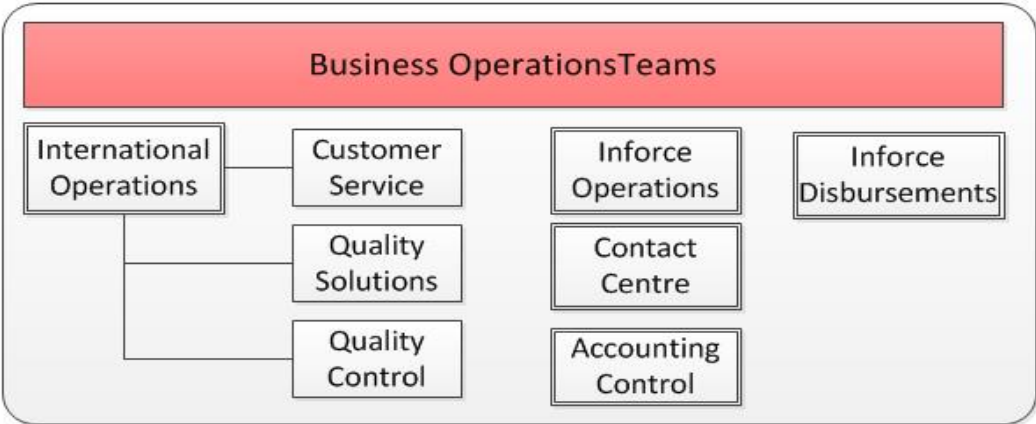
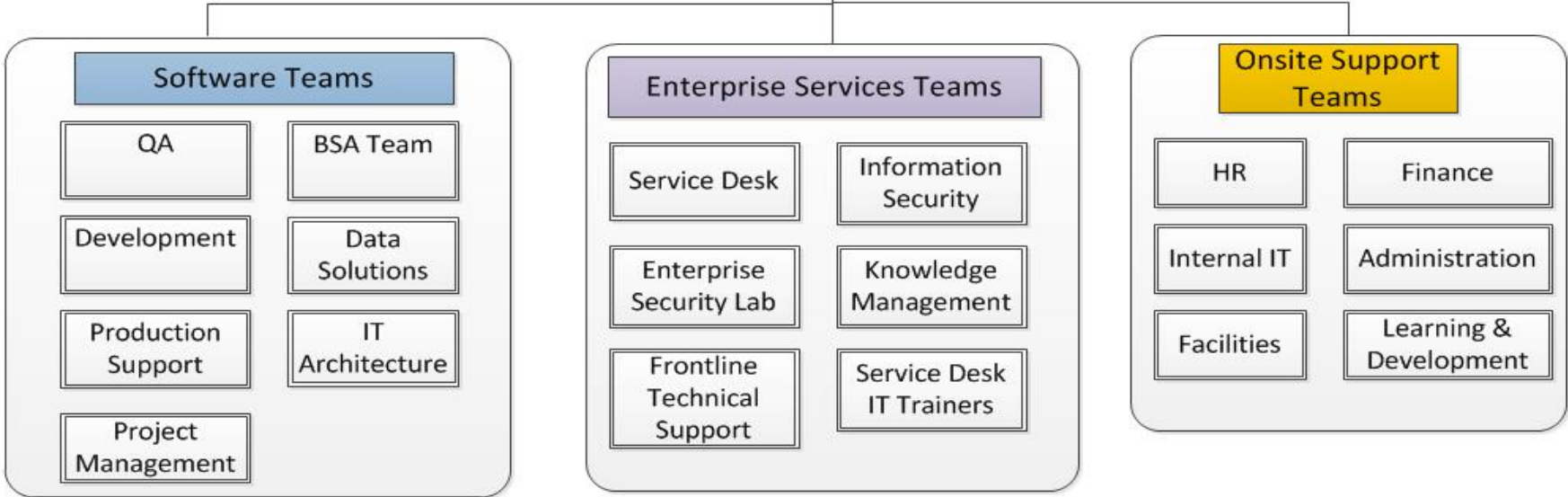
- Established 1998
- Addition of Canadian helpdesk in 2000
- Helpdesk doubled again in 2003 with acquisition of Clarica
- IT organisation began growing in 2004
- Reductions due to changes in US business model in 2008/2009/2010
- Annuities business sold in 2013. 88 Waterford employees moved to 'Delaware Life' (now se2).



Our Waterford Teams



Sun Life Ireland

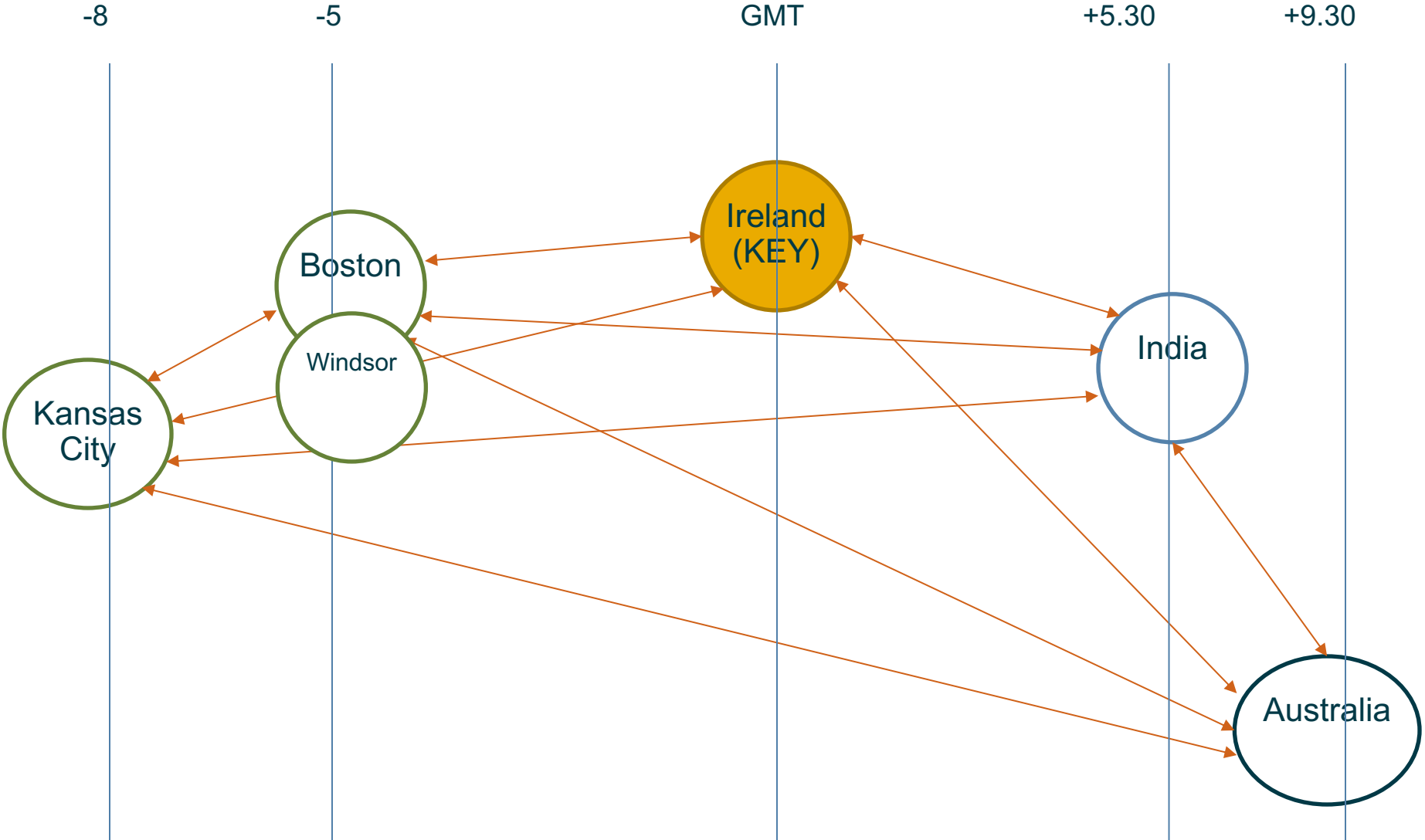


Factors

- Culture
- Type of work
- Scope of work
- Work experience
- Communication
- How you/they work



Sunlife Distributed Teams Matrix



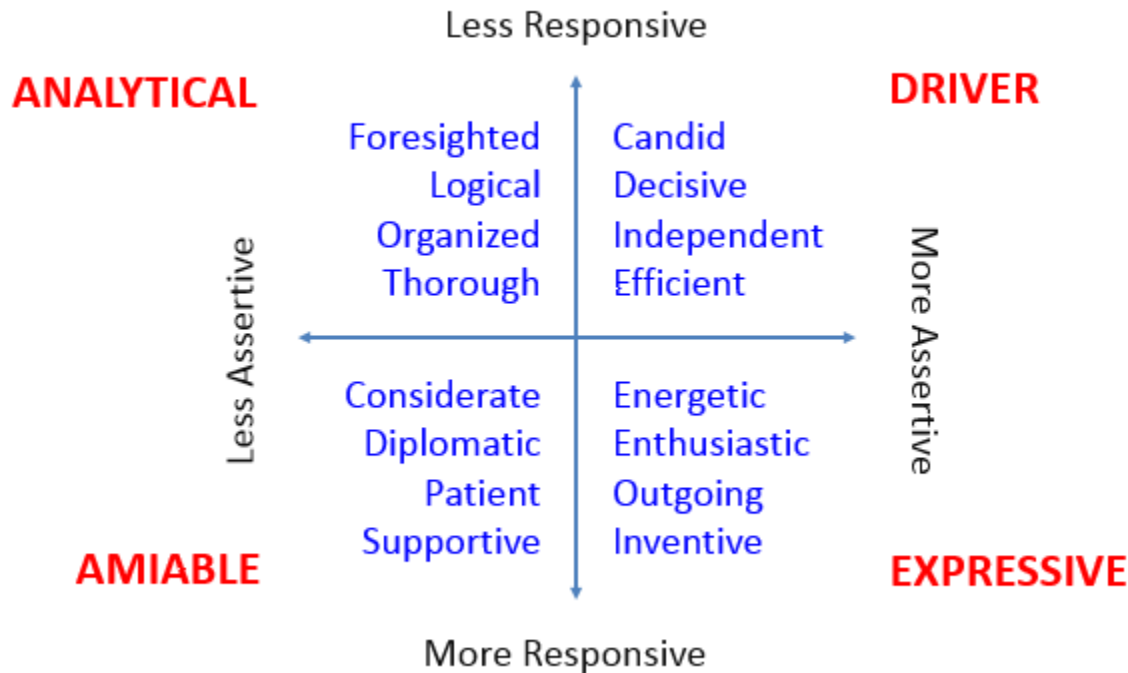
Intercultural Differences

- **Intercultural Study (Cultural Differences in Business Communication; John N. Hooker)**
 - **Cultural differences**
 - **Relationship-based and Rule-based Cultures**
 - **Power Distance**
 - This dimension relates to the degree of equality/inequality between people in a particular society.
 - **Negotiation and Decision Making**
 - **Intercultural Business Communication - NB**
 - The key to cross-cultural business is understanding one's business partners well enough to make cultural adjustments.
 - **E.G: Kansas City vs Boston vs Waterford vs Hyderbaad**



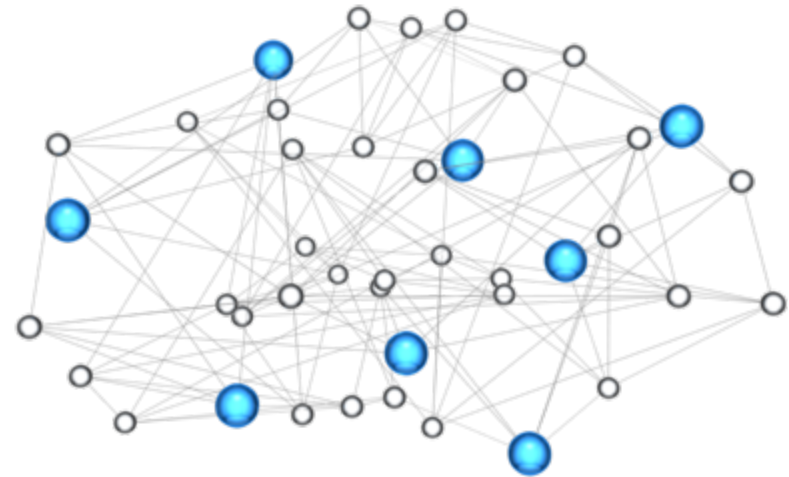
Intercultural Differences – Social Styles

- Try to understand each others styles
 - Development teams typically have a lot of people in the Analytical quadrant
 - PMs tend to be Drivers
 - People who like doing presentations/singing, etc. are Expressives
 - Amiables are the personable people in the team who help to keep people connected.



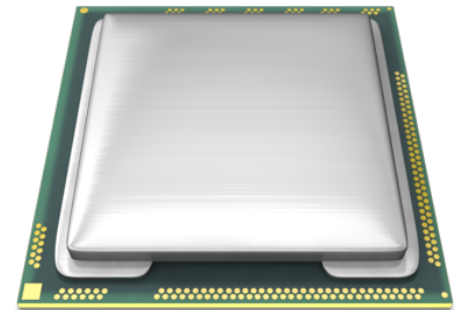
Distributed Development Vs. Outsourcing

- Distributed Development
 - Extension of the team
 - Working directly/continuously with the main team
- Outsourcing
 - Fully implemented work
 - Specific Skillsets or
 - Generally lower cost center



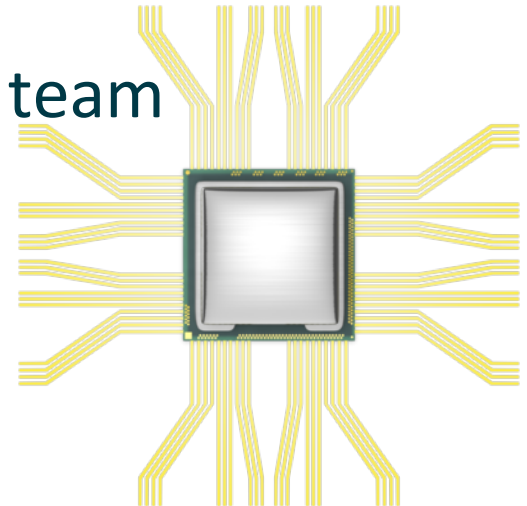
Keep in House

- Architecture/Design
- Tech Leads
- Core Systems
 - Engine Technology
 - Hardware
 - DBs



Out of House

- 2nd - 3rd tier technology
 - User Interface
 - Billing
 - M & E
 - Bug Fixing/Scripting
- Identify strong Tech Leads in a remote team
 - Good English
 - Strong technical abilities
 - Leadership qualities



Work History

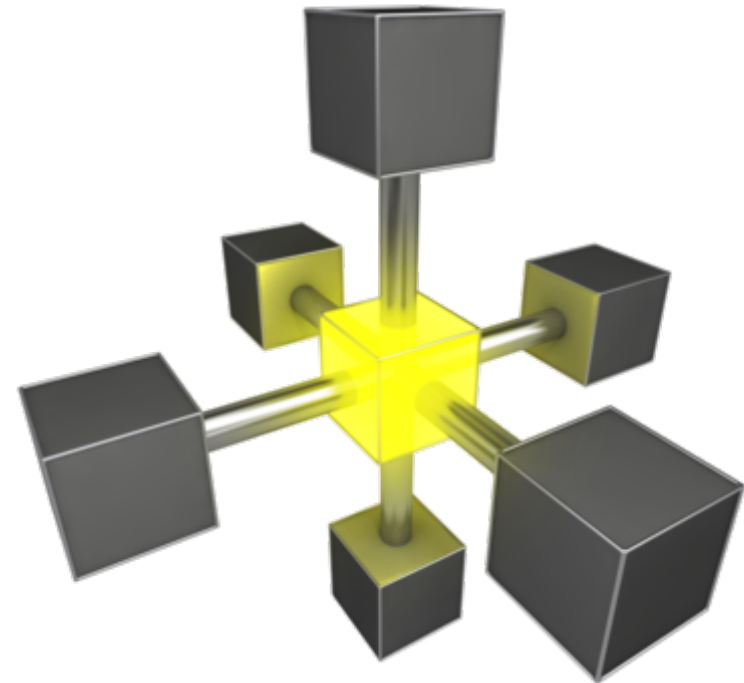
- What typical products have they developed
 - Small/large scale
 - Complexity
 - References
 - Ability to travel

** Try before you buy...



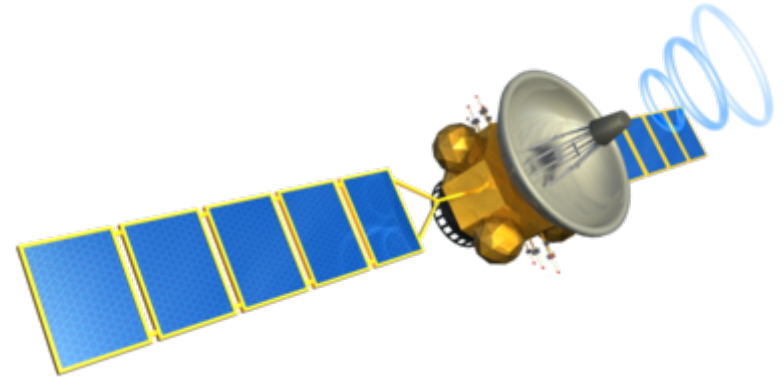
It is all about Communication.....

- What is the communication plan
- Who owns the overall vision
- Who is responsible at each site for making decisions
 - Avoid centralized decision making
- Continuously share the vision



It is all about Communication.....

- Provide multiple communication paths
 - Daily Standups
 - Video Chat
 - Continuous communication
 - Text Chat
 - Phone



****Ensure these systems work and are always available****

It is all about Communication.....



Using technology – team meetings



Camera and Voice (18)

A grid of 18 video call participants arranged in three rows and six columns. Each participant's name is displayed in a small black box at the bottom of their respective video frame. The participants are: Justin Masson, Jesse Kielthy, Michelle Herrold, Jen Dyer, Stacy Maciel, Amanda Pate, Karleen Knuth, Matthew White, Ken Baker, Carrie Sterenberg, Jen Mueller, Amy Smith, Anthony Ciaramicoli, Debbie Ruth, Brian McTeague, Briana Jury, Steph, and Anne P.

Team Agenda

Updates:

- Merit increases & AIP
- Resource Mapping
- Upcoming holidays
- Training Requests

Team Notes (01/30/2017 mtg)

Update Notes:

- Merit increases & AIP conversations will be mid February
- Please ensure you have your Q2 resource maps completed and in the Sharepoint by 02/03
- Jesse will be off the week of 03/03
- National Account training will start the week of 02/20 (Joe to support)

Using technology – team meetings



Camera and Voice (18)

 Justin Masson	 Jesse Kielthy	 Michelle Herrold	 Jen Dyer	 Stacy Maciel	 Amanda Pate
 Karleen Knuth	 Matthew White	 Ken Baker	 Carrie Stenberg	 Jen Mueller	 Amy Smith
 Anthony Ciaramicoli	 Debbie Ruth	 Brian McTeague	 Briana Jury	 Steph	 Anne P

Kudos/Shout Outs! (Everyone)

Justin Masson: Thanks to Steph for finishing the Micro Learning 1 page job aid
Jesse Kielthy: Just want to say huge congratulations to Mary and John on their recent engagement!!

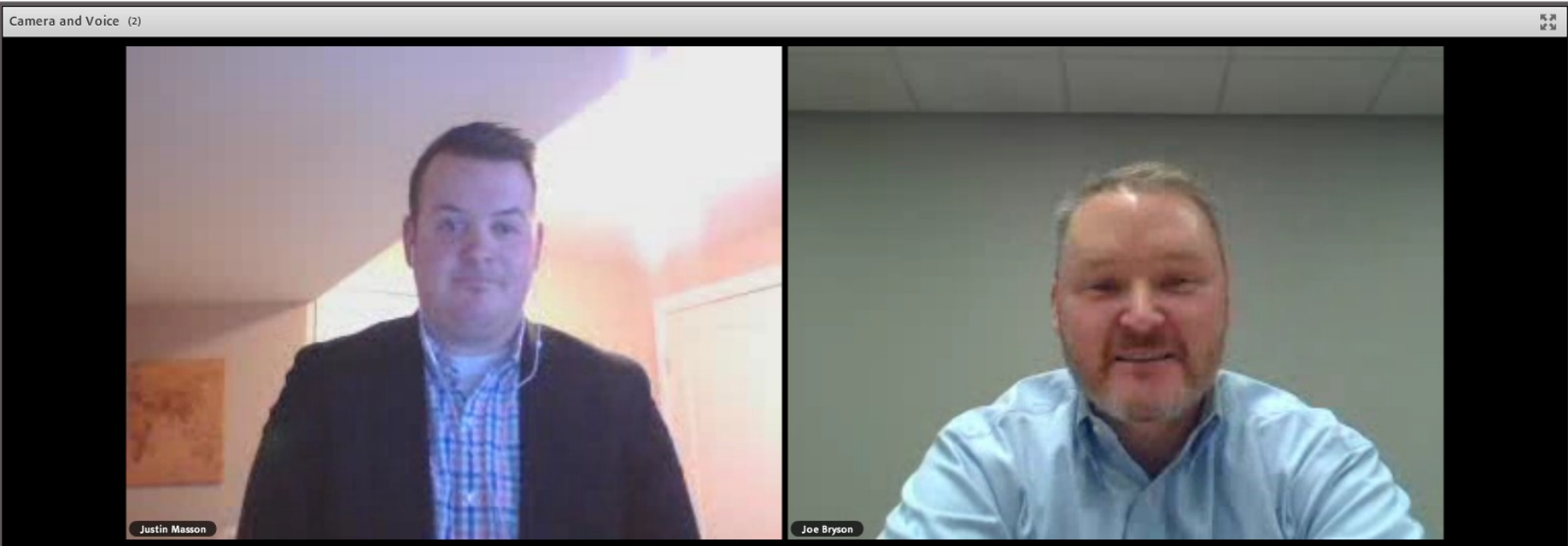
Learned something new... (Everyone)

Justin Masson: The new Avaya phones have a power regulator on the back of them that needs to be adjusted to allow them to work properly (KC NET)
Jesse Kielthy: Doing presentations but don't have a laser? Hold down the CTRL button while at the same time press-and-hold the left button on your mouse and you'll get a laser pointer on your slide

Needing help... (Everyone)

Justin Masson: Does anyone have any documentation on GWEW or Workbench that I can repurpose for an upcoming training
Jesse Kielthy: Anyone know how I can book catering services in KC?

Using technology – 1-to-1 meetings



Take Aways

Jesse
- Send Justin the metric report from the Project Management update

Justin
- Send Jesse the Call Center Training schedule for Ireland to look for resource & training room availability

Get your teams face to face

- Key points for person to person contact
 - Inception
 - What is the concept/goal for the project
 - Talk about how things will work
 - Expectations on quality
 - Development/Production
 - Review final designs
 - How are we splitting the work
 - Post Production
 - Process for managing defects
 - Process for shutting the product down



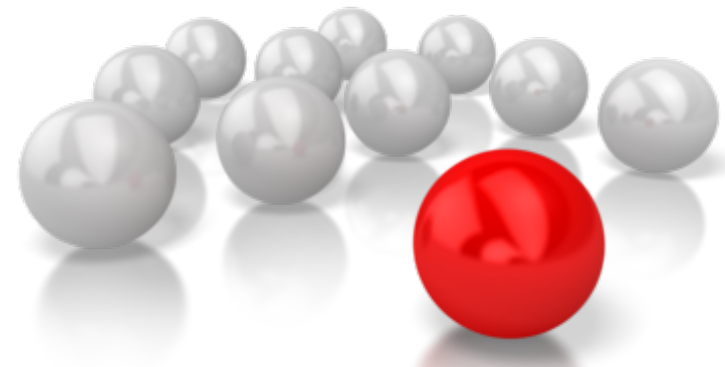
Dealing with time zones

- What are the common working hours
 - Can you shift development times closer?
- Who stays late/who gets up early?
 - Multiple time zone impact
 - Consider impact to efficiency when selecting partners and development type
- Central Hub i.e Waterford



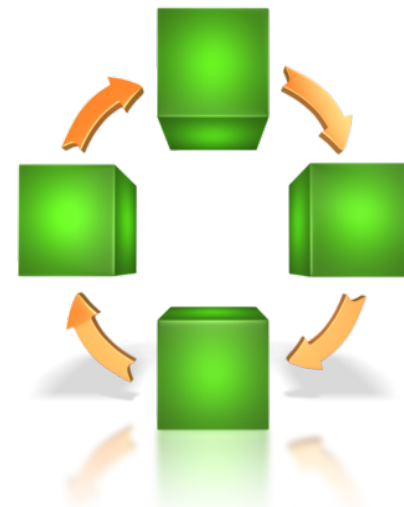
Know your team members

- How do individuals work in each geo location?
 - Self Starters (SLF Perm Leads)
 - Ability to handoff work with little oversight
 - Can work from basic information
 - Directed Developers (EBIX contractors India)
 - Require specific direction and oversight
 - Prefer well documented instructions



Project Methodologies

- What methodologies will each location use
 - Agile, Waterfall, Lean/Kanban
- What is the level of experience with the selected methodologies
 - Do the remote teams choices work with the main teams
- How are the key metrics tracked
 - Does everyone understand their role



- Unified project management tool
 - Accessible from each remote location
 - Allows remote location to manage “their” work
 - Support the development methodologies teams use
 - Agile, Waterfall, Lean/Kanban
 - Encourage communication process
 - Allow project leadership to get a high level view of project data
 - Ability to dig into the details



Dev Ops Strategy/Tools

- In developing our DevOps strategy we wanted all teams to speak the same language, and have a shared understanding and skills accessible from each remote location.
- Break down the silos that had been built over time, bringing teams closer together and aligning resources to delivering products, so that we can be more agile, nibble, developing and releasing high quality products quickly, efficiently and reliably.
- Remotely accessible tools such as Git, SVN, Jenkins, Sonar Cube, Ansible, Harvest etc



Summary

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