inrule

Good Beginnings

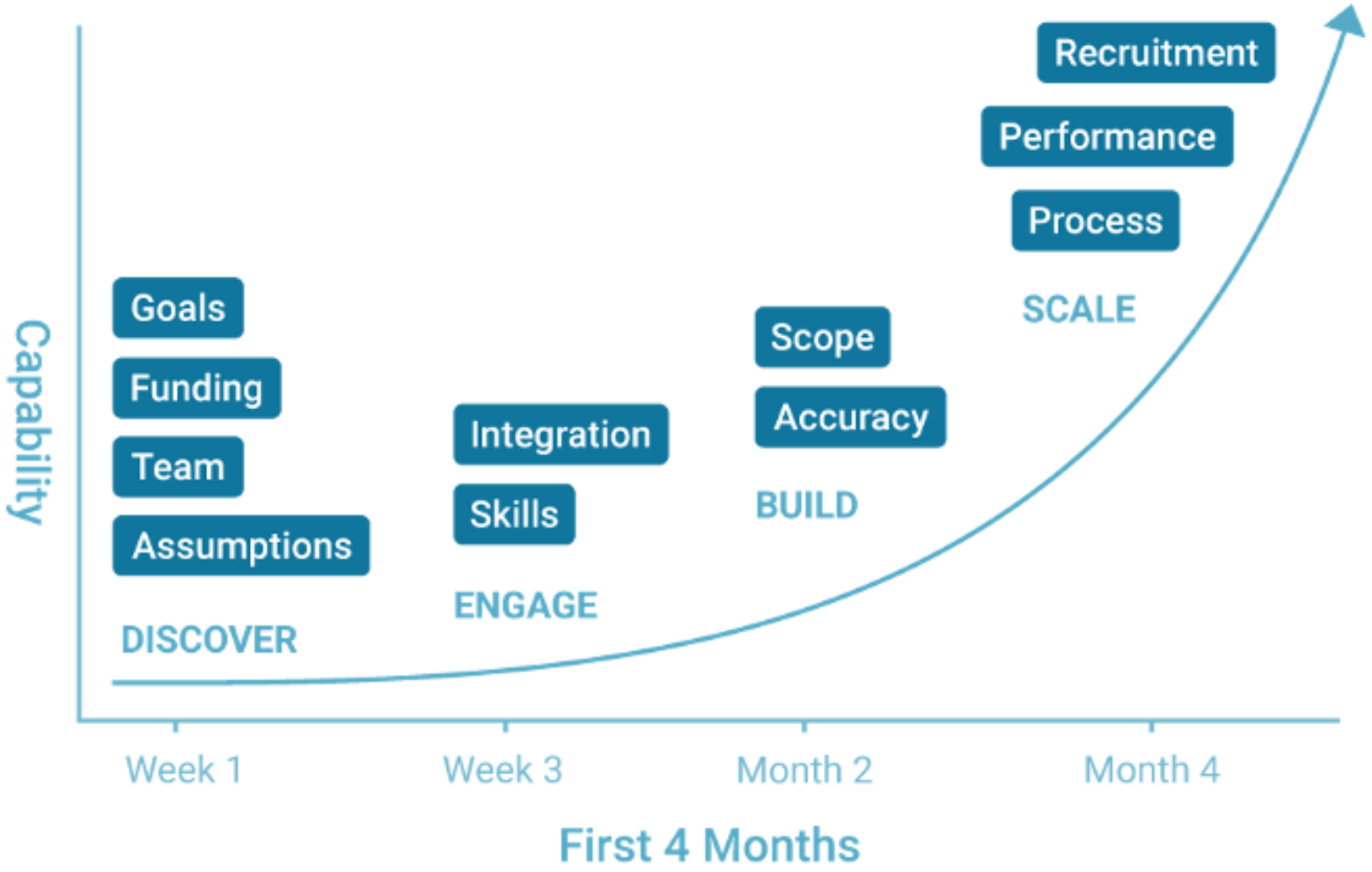
Decision Camp 2020

Case study: Insurance company in the Midwest

Summary

- 2 Years with a product and no active project
- Single architect operating in a perpetual POC
- The project sponsoring the DMS integration shifted (some said put on hold while others used other language). IT spend for the company continued un-abated with no changes to the % slated for strategic work.
- In later meetings, we discovered strategic business goals around call-center operations while the POC focused on novel integration between the DMS and mainframe.
- At no time did anyone state disbelief in the technology while the architect was clearly pulling all the knobs he could think of.

When risks surface

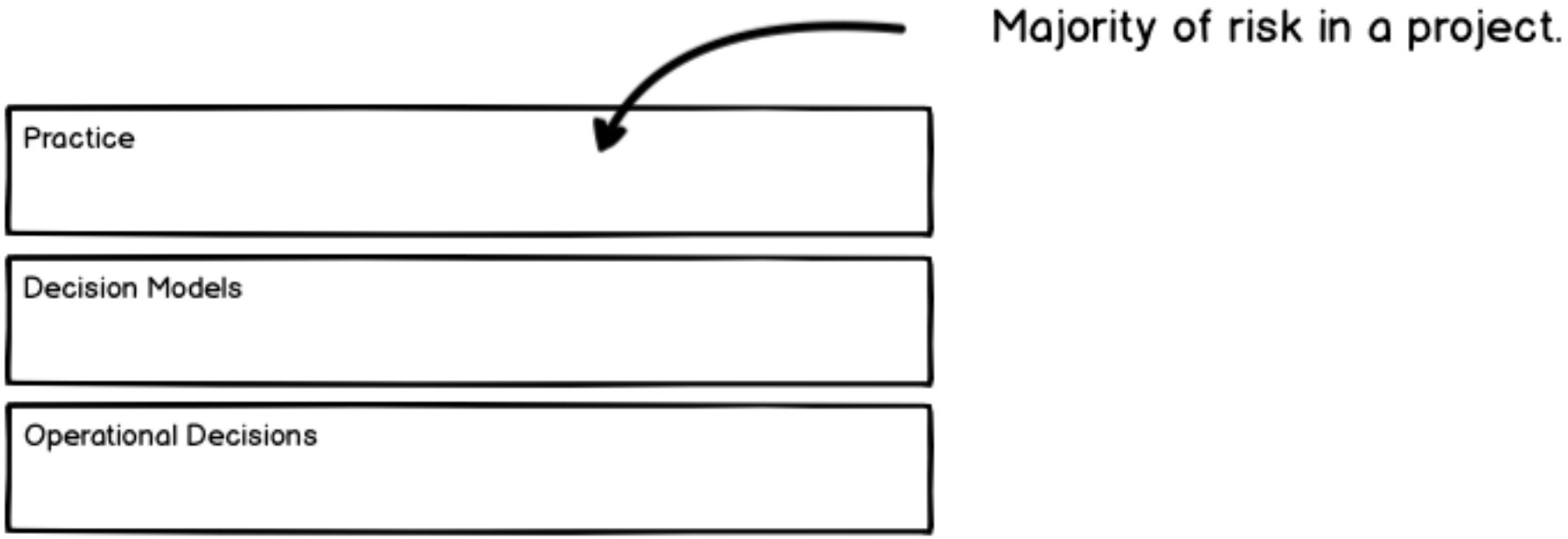


Most critical risks surface in the first 3 weeks of a project

1. The project is not aligned with strategic business goals
2. There isn't a clear structure to the team and/or key skills are not present
3. The project isn't funded to support the team required to deliver
4. The appropriate technologies to solve the original business problem were wider than expected – landing outside the traditional DMS footprint
5. Fear and uncertainty (team members don't all agree on the starting point)

Can we agree on a common set practices that reach outside the decision model?

What would it look like?



Defining culture and core values

- Transparency
- Accountability
- Trust
- Autonomy (tendency toward action)
- Practice driven/ Data driven/ Model driven
- Courage

Defining practice

- Leadership
- Stakeholders
- Team members, roles and skills
- Team building
- Problem agreement
- Decision modeling
- Operationalizing (Capability)
- Simulation
- Governance
- References and Architecture
- Organizational Scaling

Stakeholders

Identify your stakeholders and play back your progress to them on a regular basis. Stakeholder playbacks build trust, establish accountability and open a channel for success and new thinking to occur. This is the group that will decide "what's next" or "what's done", and help with organizational changes to build the team.

- [ ] The stakeholders have been identified and agree to their role.
- [ ] A cadence of stakeholder meetings is in place for communicating goals, progress, and challenges.
- [ ] Stakeholders are ready to support internal recruitment and secure a budget.
- [ ] Stakeholders include executive sponsors and represent all critical aspects of the known business problem.

Team Building

Funding the team and recruiting to it are equally important. It's not enough to acquire your licensing, you still need people working full-time executing for the business. Part-time staff can help; however, team members with split commitments do not work well in the long run. In time, a focused team can grow into a center of excellence and lift all teams working on rule projects.

- [ ] FTE counts have been funded and approved.
- [ ] A plan exists to transition part-time rule authors to full-time.
- [ ] An accelerated training plan is in place for external hires.
- [ ] Existing experts are motivated to train external hires (if needed) in addition to their daily workload.
- [ ] All of the roles are identified and represented by people (Rule Authors, Rule Architect, Integration Architect, Project Manager, Team Lead, Data Analyst)

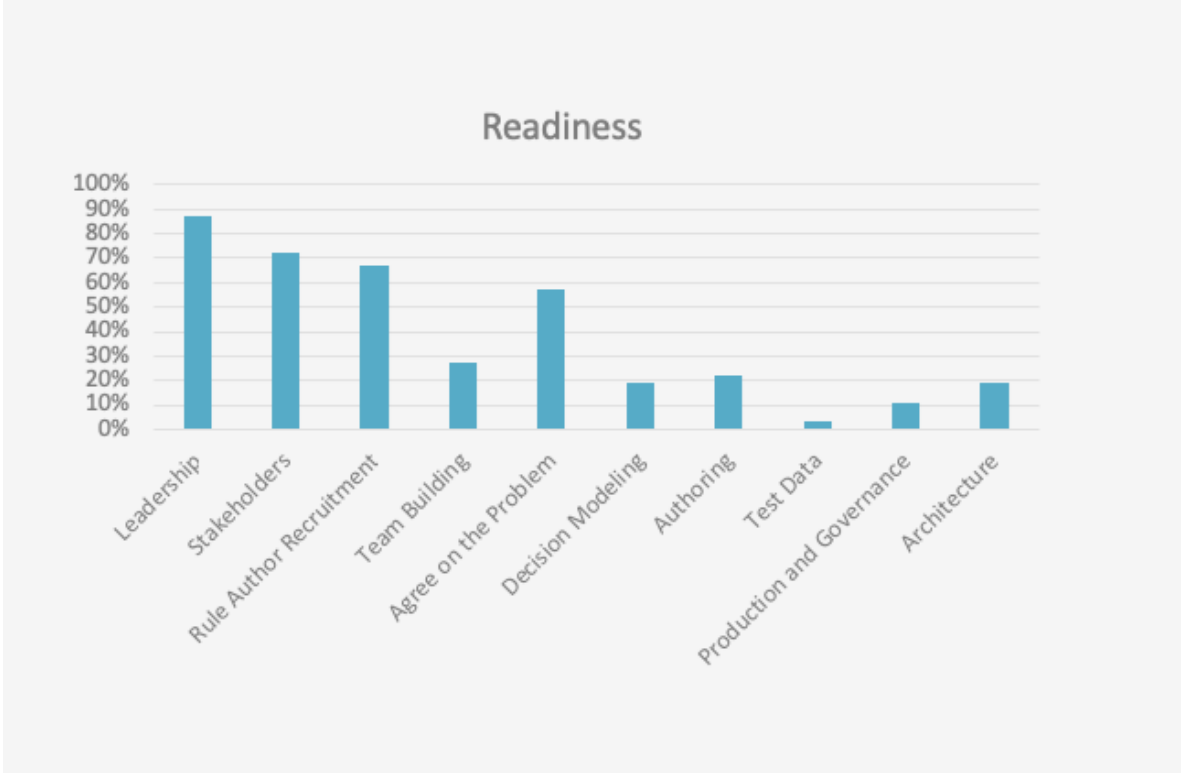
Agree on the Problem

Once you have your stakeholders identified, establish that the team is focused on the right problems. There are times when a Decision Management solution is purchased to solve architectural and requirements problems; however, folks soon learn it's a platform for strategically aligning business goals and making them operational across systems. Having said this, the team needs to answer several questions. For example, how does the team know that the output of a decision is desirable? How does it drive or affect the behavior of the organization? Across an aggregate of data, how can you prove it's better? To accomplish this, you need to clearly state the rationale behind every decision. Make your assumptions known as a group and then work on hypotheses that lead to shared goals and execution. Eventually you will write goals for the team that include what you want, how you will measure it, and the time frame for execution.

- [ ] All stakeholders understand why this project is taking place.
- [ ] All stakeholders can state problems that will be solved, if prompted.
- [ ] All stakeholders agree on how success will be measured relative to the investment and in what time frame.
- [ ] All stakeholders can state what the active risks are to the project and known remediation.
- [ ] Business value is measured as a metric or KPI.

Measuring readiness and maturity

	JK	SD	JA	BA	JF	KH	PH	MS	Totals	Percent		
Leadership												
The program leader favors transparency over other principles.	1	1		1		1	1	1	6	75%		
The program leader is open-minded and considers feedback	1	1	1	1	1	1	1	1	8	100%		
The program leader has a proven track record of motivating o	1	1	1	1	1	1	1	1	8	100%		
The program leader manages access to their team without ac	1			1	1	1	1	1	6	75%		
The program leader promotes team ownership and data orien	1	1		1	1	1	1	1	7	88%		
	5	4	2	5	4	5	5	5			Leadership	88%
Stakeholders												
The stakeholders have been identified and agree to their role	1	1	1	1			1	1	6	75%		
A cadence of stakeholder meetings is in place for communic	1		1	1			1	1	5	63%		
Stakeholders are ready to support internal recruitment and secure a bu		1	1	1	1		1	1	6	75%		
Stakeholders include executive sponsors and represent all c	1		1	1	1	1	1		6	75%		
	3	2	4	4	2	1	4	3			Stakeholders	72%
Rule Authors												
Rule authors have been identified internally and agree to their	1	1	1	1	1		1	1	7	88%		
Rule authors understand the business's goals and are alread	1			1	1		1		4	50%		
Rule authors are social, assertive and able to communicate i	1			1	1		1	1	5	63%		
	3	1	1	3	3	0	3	2			Rule Author Recruitment	67%
Team Building												
FTE counts have been funded and approved.	1			1	1		1	1	1	6	75%	
A plan exists to transition part-time rule authors to full-time.								1		1	13%	
An accelerated training plan is in place for external hires.					1					1	13%	
Existing experts are motivated to train external hires (if needed) in addition to their daily workload.						1				1	13%	
All of the roles are identified and represented by people (Rule	1						1			2	25%	
	2	0	1	2	1	1	3	1			Team Building	28%
Agree on the Problem												
All stakeholders understand why this project is taking place.	1	1	1	1	1	1	1	1	8	100%		
All stakeholders can state problems that will be solved, if pro	1	1	1	1	1		1	1	7	88%		
All stakeholders agree on how success will be measured relative to the investment and in				1			1	1	3	38%		
All stakeholders can state what the active risks are to the project and		1					1	1	3	38%		
Business value is measured as a metric or KPI.							1	1	2	25%		
	2	3	2	3	2	1	5	5			Agree on the Problem	58%
Decision Modeling												
Team members have agreed on and understand the data model (entities) that will be used for the project.							1		1	13%		
Variation and synonyms have been excised from the data model (entities).									0	0%		
The team agrees on specific vocabulary for their problem domain.							1		1	13%		
Significant changes to the data model (entities) are no longer taking place on a daily or weekly basis.									0	0%		
Teams sharing the data model (entities) meet on a regular basis and plan together for changes.							1		1	13%		
The team can demonstrate visually how decisions impact the	1				1		1		3	38%		
The team can demonstrate how the decisions will be organiz	1								1	13%		
Rules are harvested or written down prior to rule authoring.	1		1	1	1		1		5	63%		
	3	0	1	1	2	0	5	0			Decision Modeling	19%
Rule Authoring												
The decision can be demonstrated end-to-end (even if it's missing capability).				1			1		2	25%		
The decision represents the high-risk areas.							1		1	13%		
The team is comfortable with making changes and no longer relies on architects and developers for advice.									0	0%		
Every team member has attended training.			1	1	1		1		4	50%		
Technical aspects of the project have been completed (vocabulary templates, etc).									0	0%		
	0	0	1	2	1	0	3	0			Authoring	22%
Test Data												
Test data resides in a reusable state and is easily updated by the team.					1				1	13%		
Test data is easily "hooked up" to decisions for testing and reporting.									0	0%		
The team engages in "what if" scenarios for experimentation.									0	0%		
The team asserts that the test data represents what is required for production quality.									0	0%		
	0	0	0	0	1	0	0	0			Test Data	3%
Production and Governance												
The team can trace decisions through revisions.									0	0%		
The team communicates changes to production consumers and monitors usage.							1		1	13%		
The team implements established security best practices.							1		1	13%		
Team members articulate in detail the promotion process and sign-off.							1		1	13%		
Change requests are managed in a tool suitable to manage a backlog.							1		1	13%		
The team promotes best practice as a center of excellence within the larger organization.							1		1	13%		
	0	0	0	0	0	0	5	0			Production and Governance	10%
References and Architecture												
The team trains new developers on critical aspects of the integration architecture.							1		1	13%		
The team maintains a simple prototype or sample demonstra	1	1					1		3	38%		
The team continually improves the architecture and advances the stack toward strategic goals.							1		1	13%		
The team shares its architecture and success throughout the organization.							1		1	13%		
	1	1	0	0	0	0	4	0			Architecture	19%
	19	11	12	20	16	8	37	16				
	39%	22%	24%	41%	33%	16%	76%	33%				



Where do we go from here?

Questions?