So What's this Agile Thing, Anyway?

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A "VUCA" World

VUCA:

• V = Volatile

Dynamic, ever-changing, different forces at work

• U = Uncertain

Lack of predictability, prospects for surprise

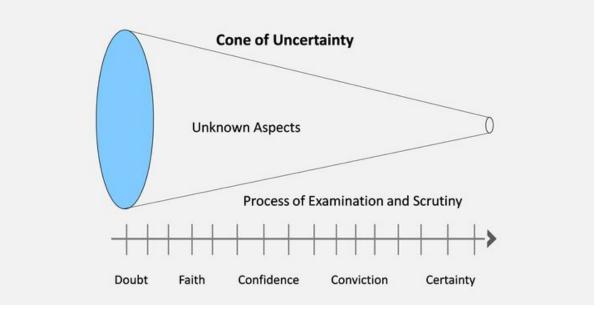
• C = Complex

No "cause-and-effect" chain, confounding issues

• A = Ambiguous

The haziness of reality

The Cone of Uncertainty



The beginning of any endeavor is the time at which we know the least about the results.

What Is "Agile?"

- An iterative problem solving methodology that values human communication and feedback, adapting to change, and producing working results.
- An approach and a mindset that can be used to solve complex problems.
- Agile can (and has) been used in many fields outside software development.
- Deming Cycle (Plan-Do-Check-Act) is a basic example
- Frameworks include: Kanban, XP, DevOps, Scrum, and many others.

Agile Manifesto

Individuals and interactions over processes and tools Working solutions over comprehensive documentation Customer collaboration over contract negotiation Responding to change over following a plan That is, while there is value in the items on the right, we value the items on the left more.

Toyota Production System

Example of Agility before Agile Software Development

- An organizational culture as much as a factory system
- Designed for learning and continuous improvement
- Motivate and develop problem solving ability
- Helped mitigate supply chain problems

Harvard Business Review article:

https://hbr.org/2022/11/what-really-makes-toyotas-production-system-resilient

Conventional vs. Agile Mindset

	Conventional Thinking	Agile Thinking		
People Are:	Resources who need extrinsic motivation to do well	Humans with intrinsic motivation (They want to do their best)		
People Excel Because:	They are more intelligent	They put in effort and learn		
Decisions Are Made By:	Management Only	Those Impacted by the decision		
Build the Right Product By:	Rigorous Upfront Analysis and Detailed Specifications	Demos to the Customer and getting the Customer's feedback		
Groups Work As:	Siloed Groups of Individuals	Self-Organized Teams		
Clients Are:	Who We Get Specs from in the beginning; Testers at completion	Collaborative Partners throughout the process		

Iterative Adaptation

"I want to be able to speak to someone in another building" "I want to be able to specify which device I want to connect with" "I don't like waiting for the dial to rotate back. Can we have buttons instead?"

"What if I'm outside?"

"Can I put it in my pocket?"



Miami Example - BI W-2 Reporting

Problem:

- ullet
- Planning beginning in June for January 31 deadline.
- Payroll "conventional mindset".
- Pandemic shift to remote work more tax bodies (and reports!)

Result:

• Highly stressful, working late nights, weekends, holidays.

Miami Example - BI W2 Reporting

- BI Publisher Reporting of tax information using Banner output.
- Reports going to 3 States, 4 municipalities/regional tax bodies.
- Output is 512 column file, to be uploaded to online system for processing

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Miami Example - BI W-2 Reporting

Solutions:

- Meeting with Payroll more often (2-3 times per week Nov./Dec.).
- Reviewing specifications as a team.
- Using previous year's reports as template.
- Listening to each other and sharing information.

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1	KENTUCKY	BI Report: Kentucky W2 File 2022 Tax Yea					
2	Link to the W2 file specs	Specs Available					
3	Link to the W2 file specs Employer Payroll Withholding - Department of Revenue			11/8/2022	1/9/2023	1/9/2023	
4	GENERAL COMMENTS			Payroll tested: No issues.	Payroll tested: RT and RF record count in upload file is 150, actual RW record count is 90. RT record - totals in upload file do not match totals in excel file or in totals file.		
5	KENTUCKY 2022 TAXABLE WAGES & TAXES :	KY App Gross: \$1.603.379.42 Tax: \$73,671.58 2WE App Gross \$15.786.71 Tax: \$197.32 2KL App Gross \$44,643.28 Tax: \$982.16 2KC App Gross \$7.503.80 Tax: \$49.26		Test environment as of 10/14/2022 62 employees			
6							
7	RECORD DESCRIPTION:						
8	RA - Submitter Record	Identifies organization submitting file					
9	RE - Employer Record	Identifies employer					
10	RW - Employee Wage Record	Reports income and tax data for an employee					
11	RS - State Record	Reports state income and tax data for an employee					
12	RT - Total Record	Totals for all RW records					
13	RF - Final Record	Total number of RW records in file					
14							
15	RA POSITIONS	POSITION DESCRIPTION	SPACES	11/8/2022	1/9/2023	1/11/2023	
16	1-2	Record Identifier	2	ok			
17	3-11	Submitter's Employer EIN	9	ok			
18	12-19	User Identification (User ID)	8	ok			
19	20-23	Software Vendor Code	4	ok			
20	24-28	Blank	5	ok			
21	29	Resubmission Indicator	1	ok			
	30-35	Resubmission Wage File Identifier	6	ok			
22	36-37	Software Code	2	ok			

Results

- 2022 planning moved from June to September.
- All 2022 reports filed mid-January "We've never been finished this soon before!"

Final Thoughts

- People Working Together
- Shared Vision of Solution
- Respond to Change

Questions? glenn.chundrlek@miamioh.edu

Thank You