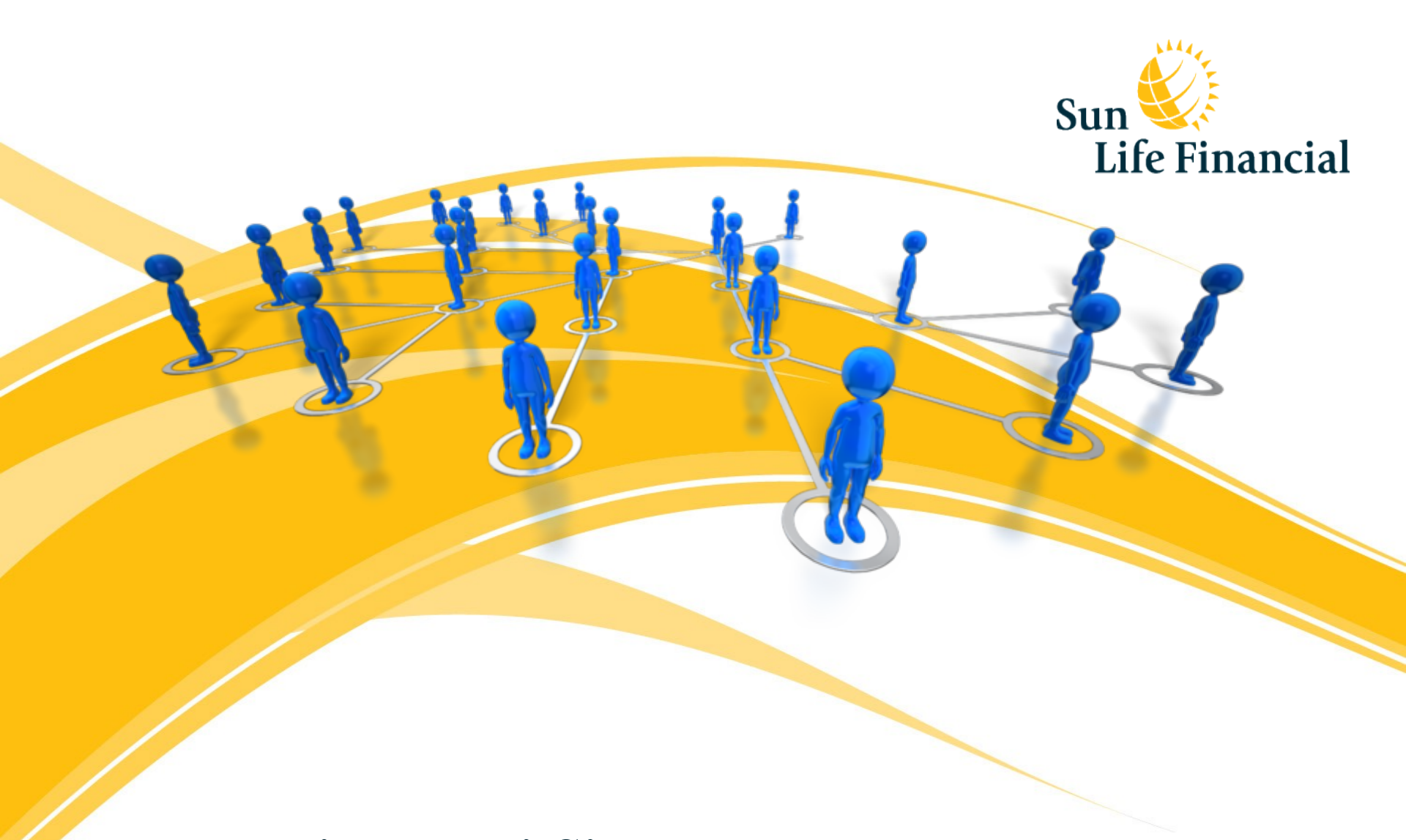


Managing Multi-Site Development Teams

Shane McCormack
Director Development CTS Sunlife

Life's brighter under the sun

About me

Sun Life Financial

- 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

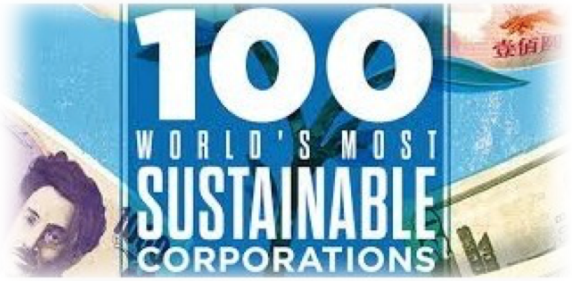
About Sun Life Financial

- 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

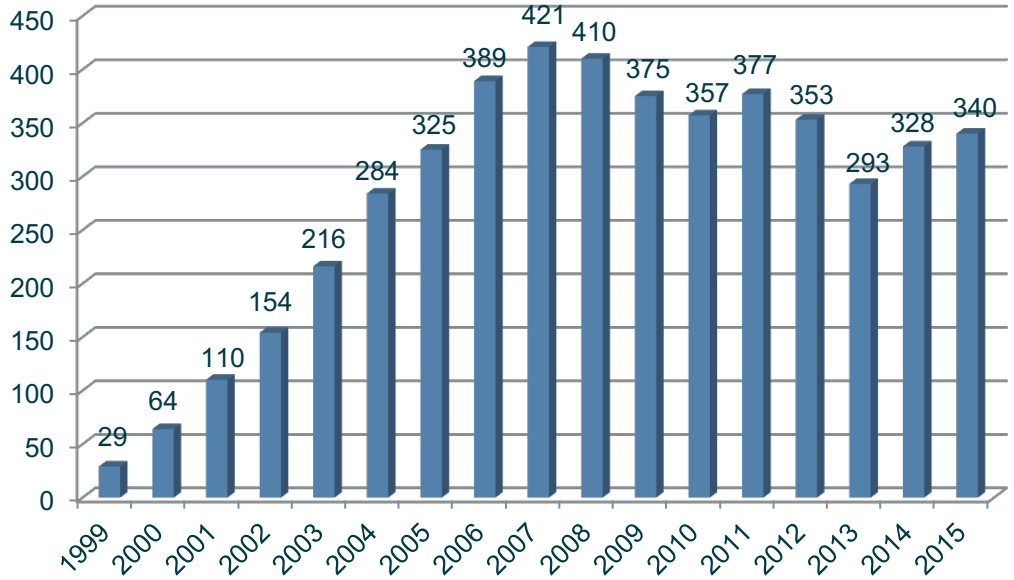
Sun Life Financial

- 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

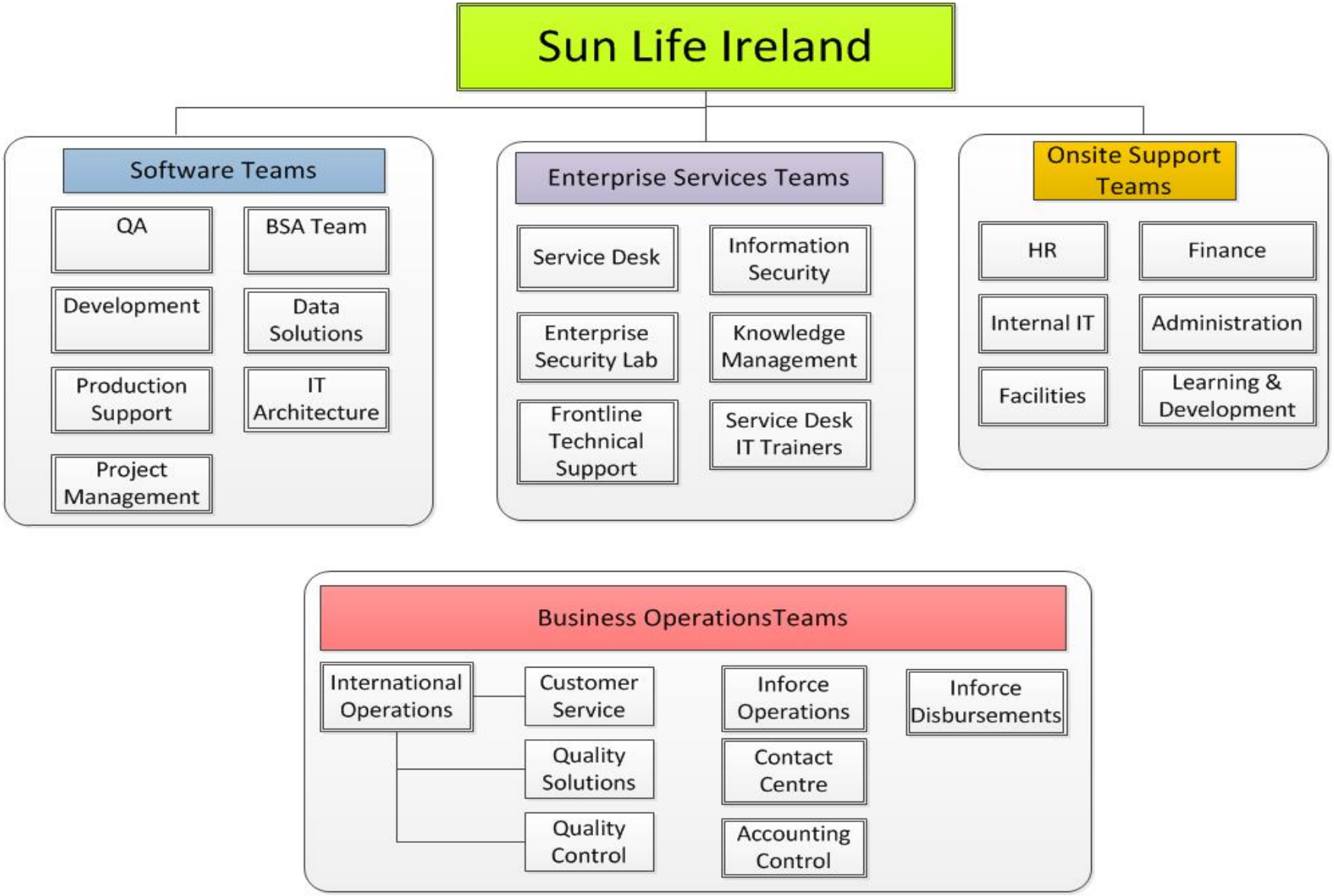
- Established 1998
- Addition of Canadian helpdesk in 2000
- Helpdesk doubled again in 2003 with acquisition of Clarica
- IT organisation began growing in 2004



- 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 Financial



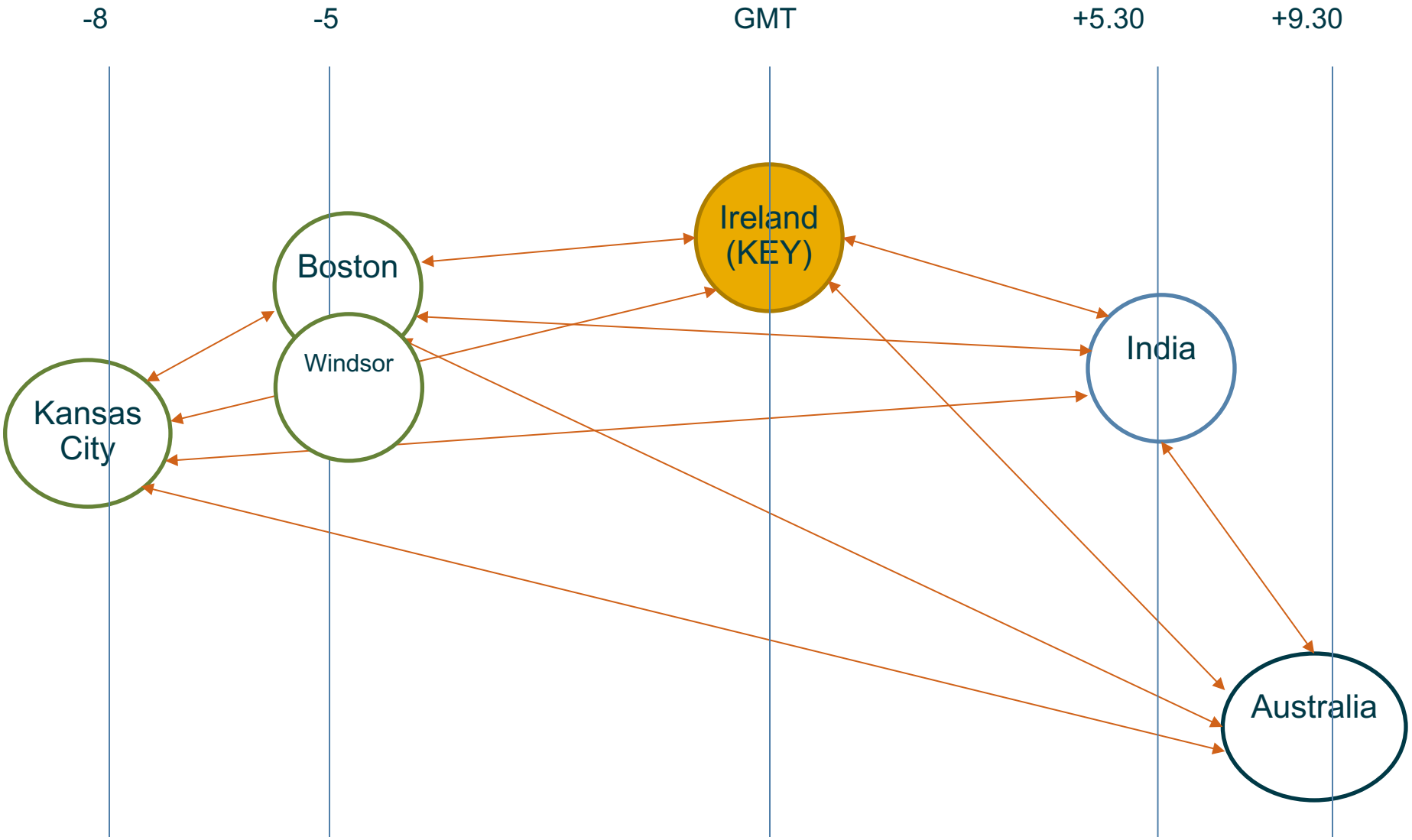
Factors

Sun Life Financial

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

Sunlife Distributed Teams Matrix

Sun Life Financial



Intercultural Differences

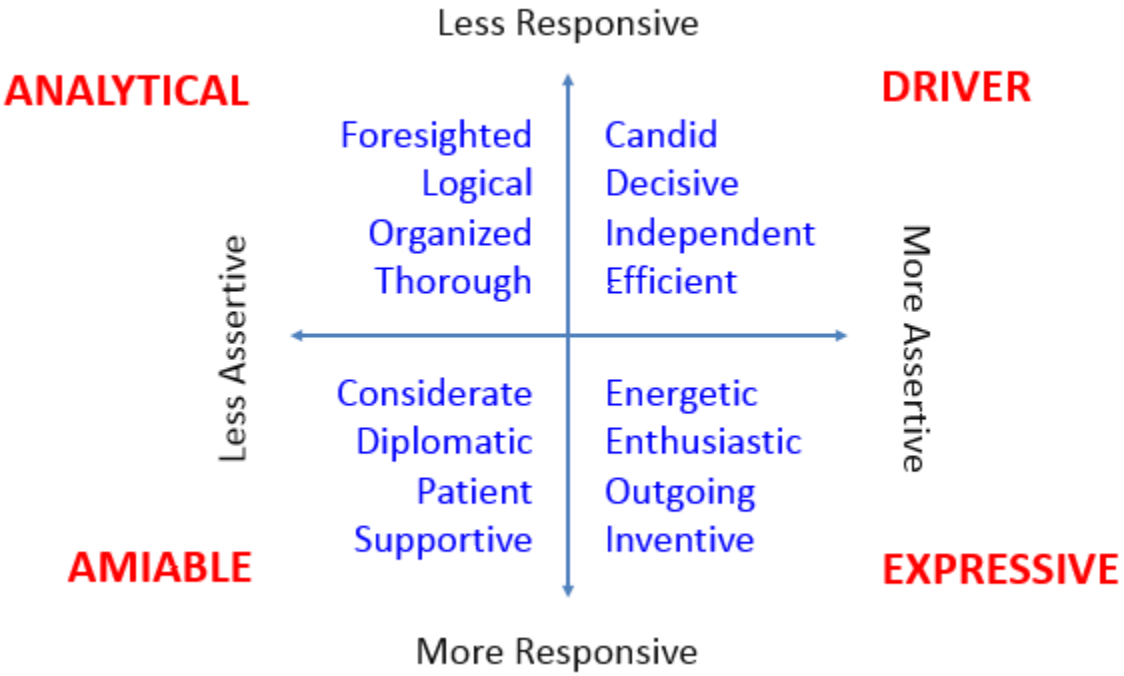
Sun Life Financial

- **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

Sun Life Financial

- 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.



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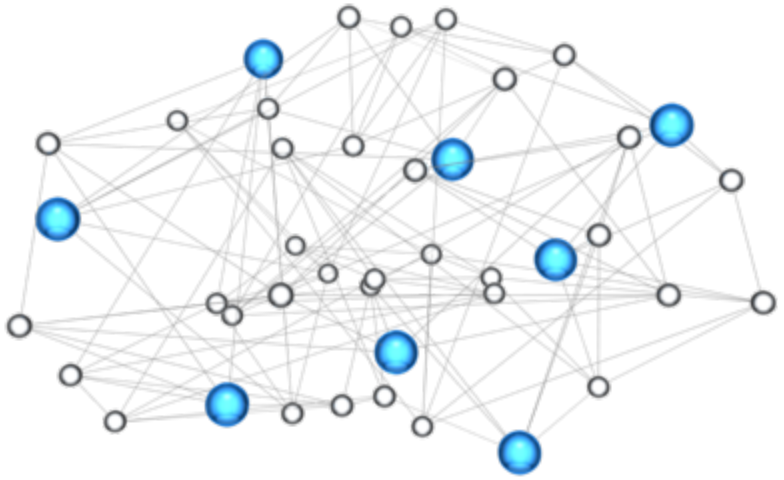
Distributed Development Vs. Outsourcing

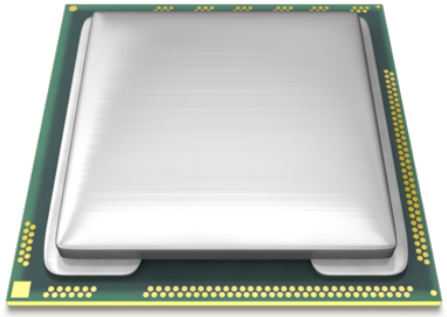
- Distributed Development
  - Extension of the team
  - Working directly/continuously with the main team
- Outsourcing
  - Fully implemented work
  - Specific Skillsets or
  - Generally lower cost center



Keep in House

Sun Life Financial

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

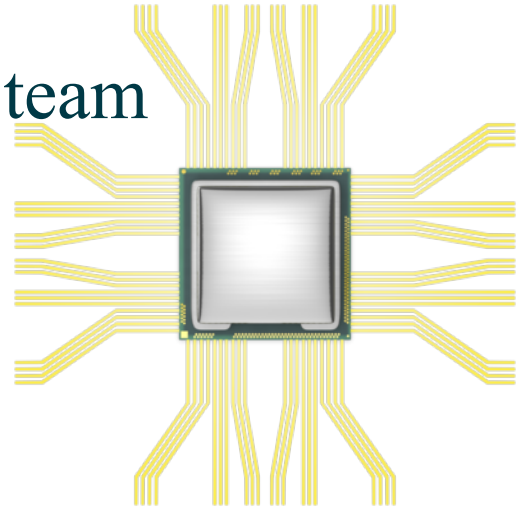


Out of House

Sun Life Financial

- 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

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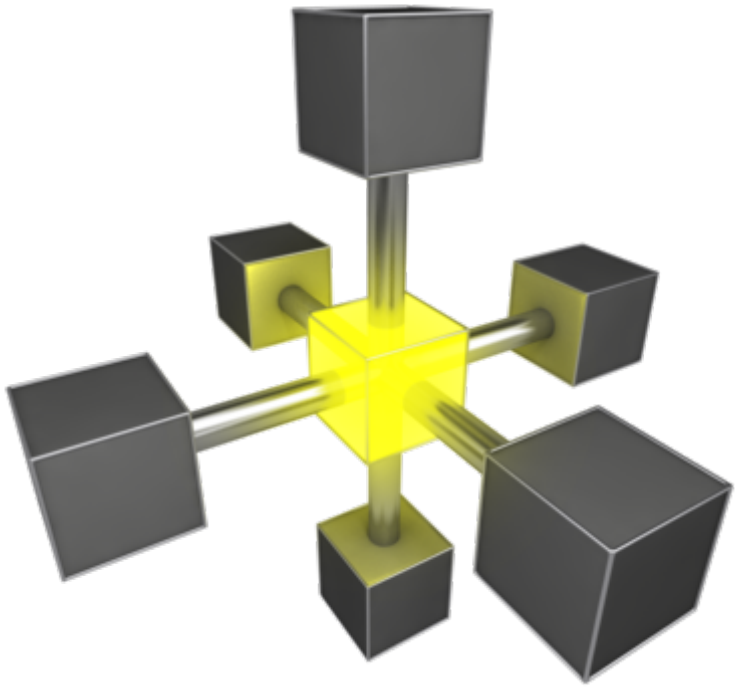
- What typical products have they developed
  - Small/large scale
  - Complexity
  - References
  - Ability to travel

** Try before you buy…

It is all about Communication…..

Sun Life Financial

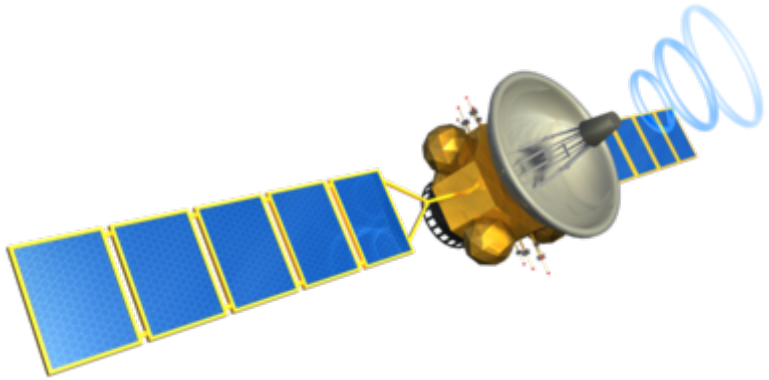
- What is the communication plan
- Who owns the overall vision
- Who is responsible at each site for making decisions
  - Avoid centralized decision making
- Continuously share the vision



It is all about Communication…..

Sun Life Financial

- 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…..

Sun Life Financial

Using technology – team meetings

Sun Life Financial

Team Agenda

Updates:

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

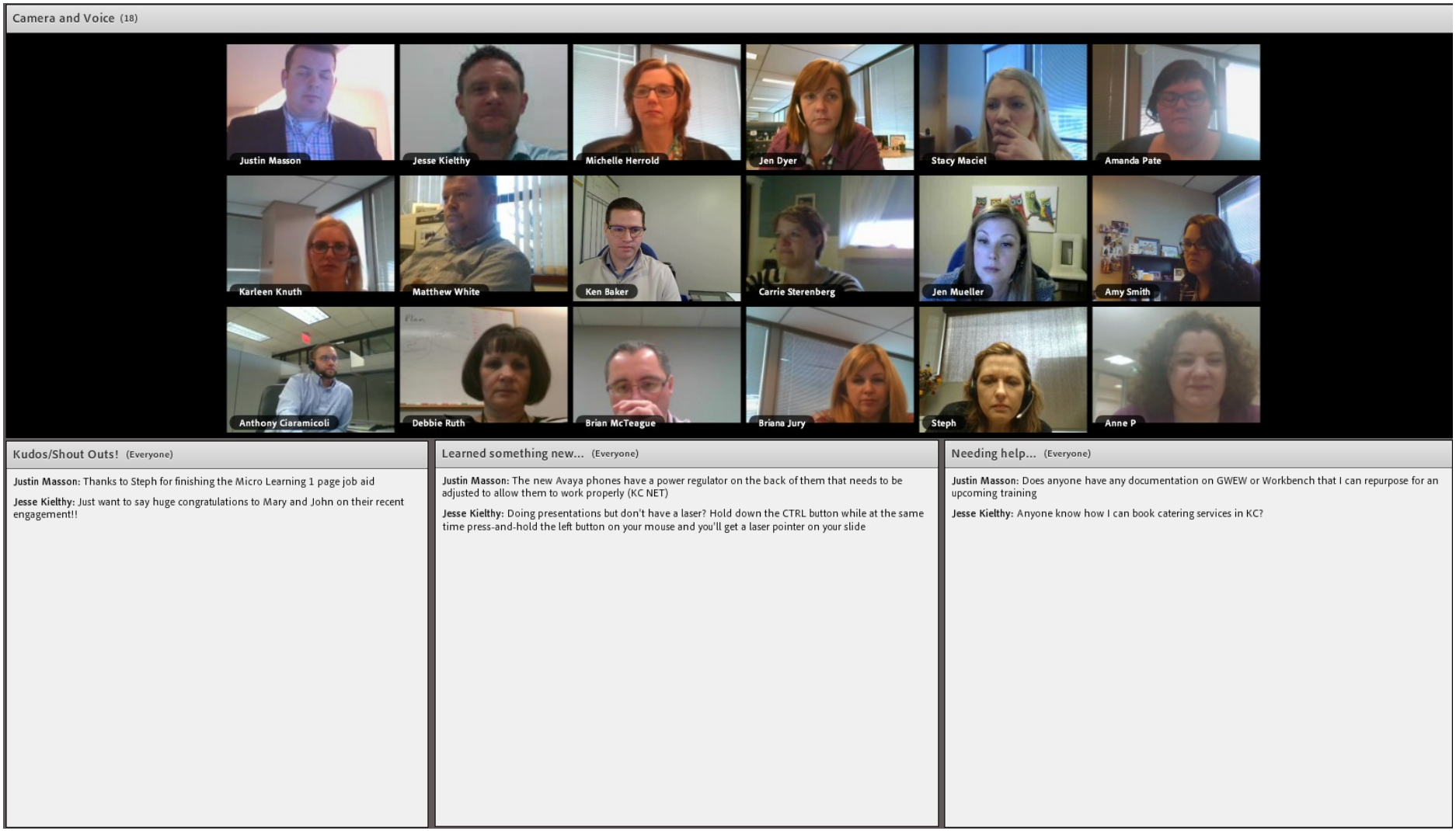
Team Notes (01/30/2017 mtg)

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

Sun Life Financial



Using technology – 1-to-1 meetings

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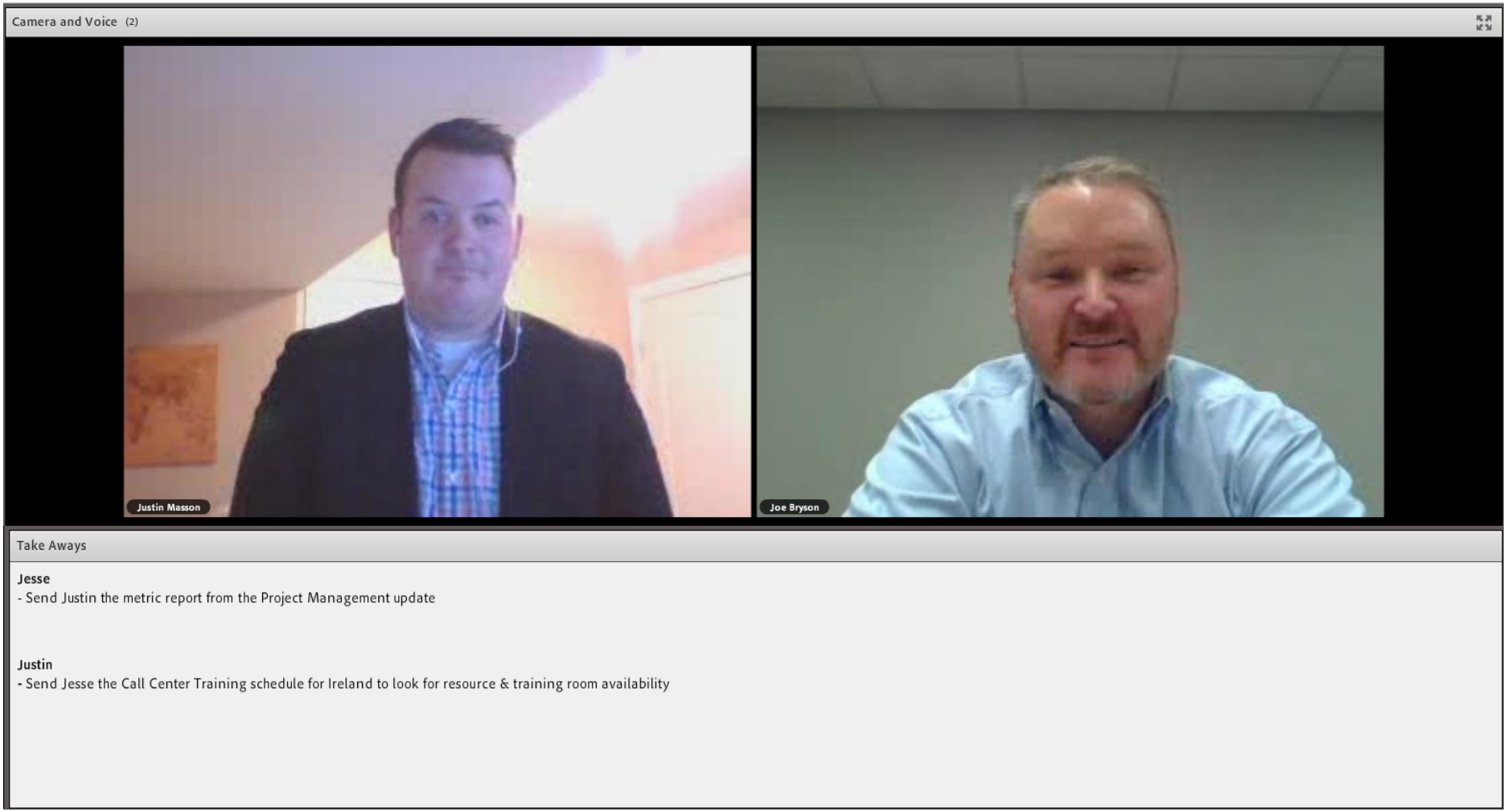


Get your teams face to face

Sun Life Financial

- 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

Sun Life Financial

- 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

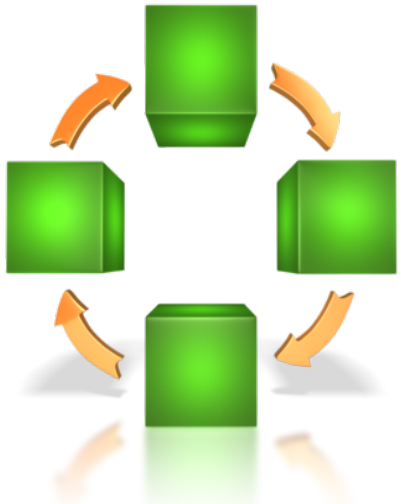
Sun Life Financial

- 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

Sun Life Financial

- 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



Project Management Suite

Sun Life Financial

- 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

Sun Life Financial

- 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, Ancible, Harvest etc

Summary

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

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