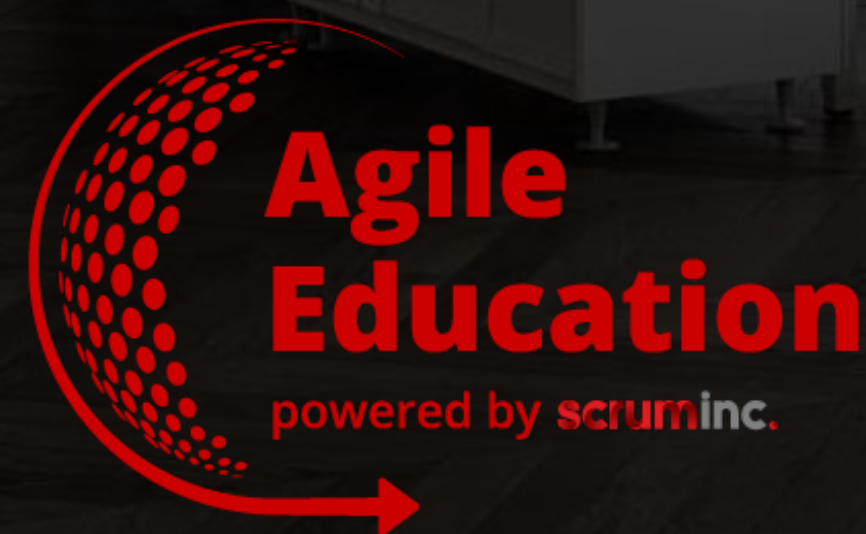


Case Study: Breaking a Three-Year Stalemate

Overcoming resistance, building trust, and achieving delivery in six months

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MFA and the Private Equity project

- MFA: custom platform extensions
- Waterfall delivery: siloed teams
- Commercial won work
- Transitions coordinated development
- Operations supported customers
- **2019**: new Private Equity facility



Acquisition and integration

- **2020:** acquired by a larger company
- Pilot project successful
- Private Equity: no progress
- Parent company framework mandated
- **2022:** cultural deadlock
- Delivery coach struggling
- My mandate: trust, alignment, delivery



Delivery Framework overview

- Agile in theory: lean in practice
- Perceived as rigid and prescriptive
- MFA leaders demanded fixed dates
- What was missing:
 - Seek first to understand
 - Start with why
 - Too lean: choke's innovation



Three foundations for change

1. Building credibility, shared understanding, trust
2. Facilitating alignment and collaboration
3. Overcoming resistance to agile and Scrum

Building credibility, shared understanding and trust

- Observing revealed a core impediment
- We learned about Private Equity
- Play the “wise fool”
- Seek first to understand



Facilitating alignment and collaboration

- Observing > guiding
- Sole Private Equity coaching focus
- Cross-functional Private Equity team
- Reduced scope



Overcoming resistance to agile and Scrum

- Questions help build understanding
- Visualize what “good looks like”
- Relative estimation helps alignment
- Voting decided the starting point
- Decomposition increases clarity
- Complimentary techniques increased confidence



Challenges and adaptations

1. Initial Scrum resistance
2. Behaviour reverted to “push” mentality
3. Misaligned understanding caused rework



Results and impact

- **Private Equity** feature delivered in ~6 months after years of delays
- **Velocity growth: 4.5x increase** (12 → 54 story points)
- **Significant drop in rework** with Behaviour Driven Development (BDD) practices
- Global Managed Fund Administration platform **integrated Private Equity**



Lessons learned

- Context is everything
- Understanding **over** process
- Resistance comes from fear
- Hands on experience reassures

Final Takeaways

Scrum:

- Brings people together around purpose
- Builds shared understanding
- Makes work more joyful
- Strengthens emotional intelligence
- Helps deliver meaningful outcomes

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