



# Confluence: Introducing agile to an 160 year old company



JENNA MCLAUCHLAN • DIGITAL DELIVERY MANAGER • ICAS •

# Agenda

About ICAS

Our agile and Atlassian journey

How we are using confluence

Benefits



# About ICAS





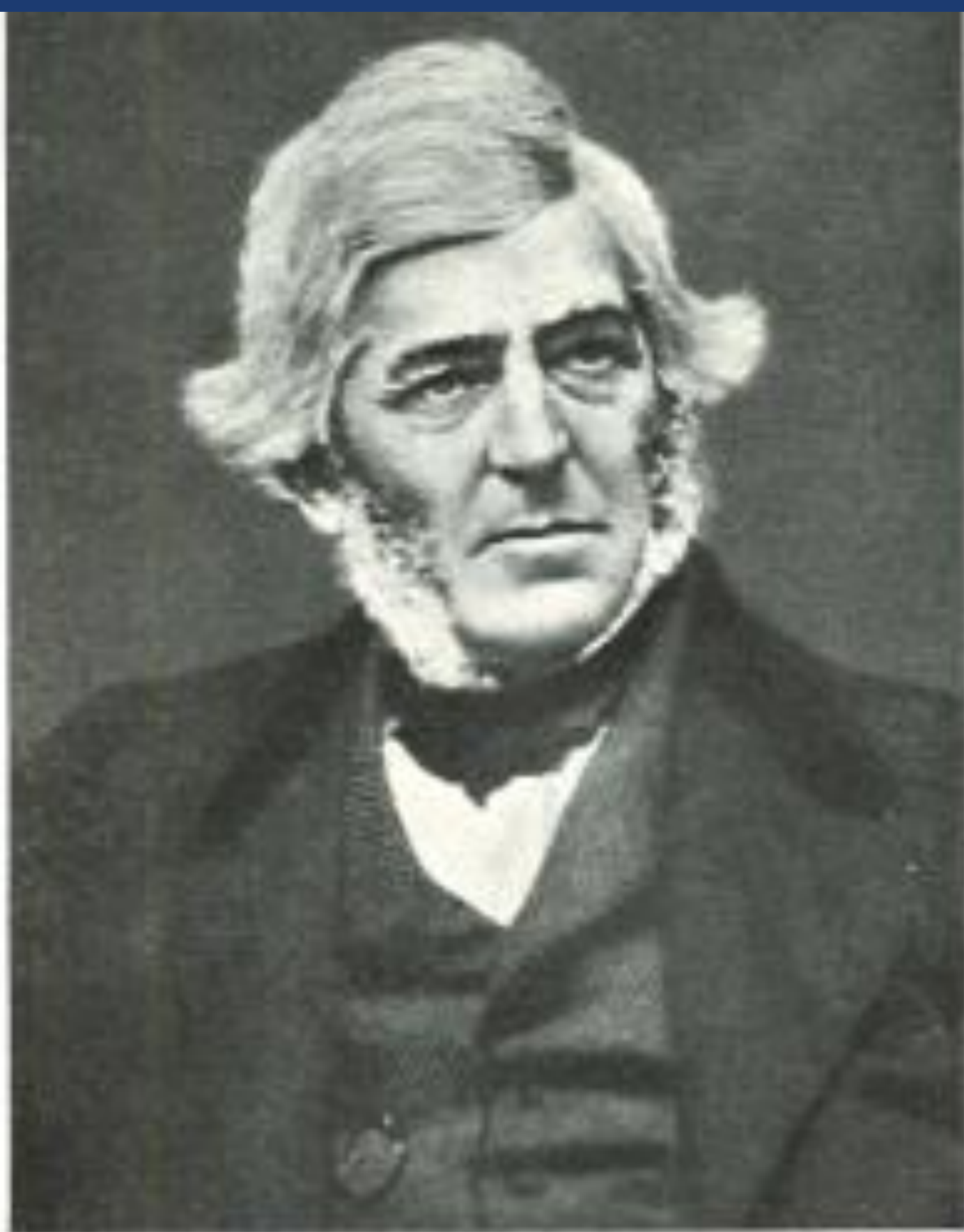






JAMES BROWN

FIRST PRESIDENT, THE SOCIETY OF  
ACCOUNTANTS IN EDINBURGH  
1853-1864



JAMES McCLELLAND

FIRST PRESIDENT, THE INSTITUTE OF  
ACCOUNTANTS AND ACTUARIES IN GLASGOW  
1853-1864



JOHN SMITH

FIRST PRESIDENT, THE SOCIETY OF  
ACCOUNTANTS IN ABERDEEN  
1867-1869







# Our agile and Atlassian journey





How can ICAS help you?

Login to your ICAS account



## Categories

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One Young CA (25)

The Power of One (21)



### ICAS reaction to EU referendum

By ICAS  
24 June 2016



### ICAS poses 20 Questions on Brexit

By ICAS  
24 June 2016



### Train ICAS Chartered Accountants (CAs)



### ICAS Principal Partner: Investec We..

3 June 2016

### The ICAS Conference 2016 - Innovation and Entrepreneurship

Event - 29 September 2016  
Location - Edinburgh

Early bird discount available now

SECURE Book tickets

In association with



### ICAS announces Close Brothers Asset..

By ICAS  
14 June 2016



### CA Dinner & Awards

Event - 7 September 2016  
Location - London



### KPMG Australia makes a move

By Chris Sheedy, CA Today  
1 July 2016



### ICAS Brexit answers: Taxation and a..

By ICAS  
1 July 2016



### Tools for productive meetings

By Alex Burden, Student Blog  
1 July 2016



### Choosing the right phone case

By Alex Burden, Student Blog  
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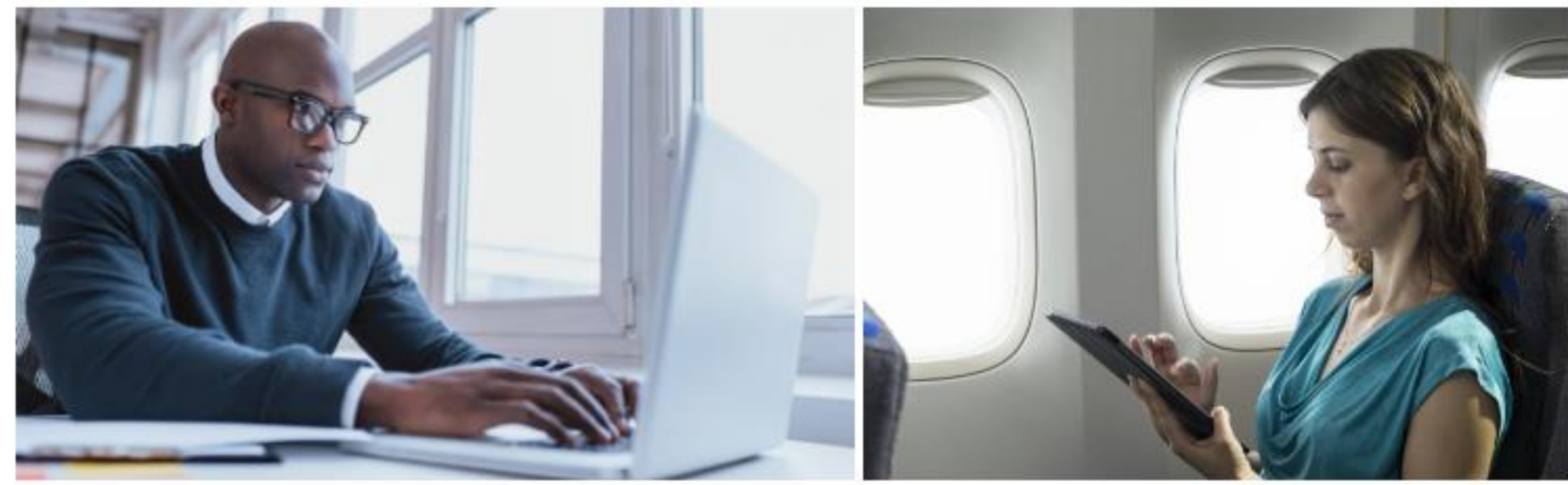
# How we are using confluence





# Annual Renewal 2017

Created by Jenna McLauchlan, last modified a minute ago



## Goal

To build a simple intuitive annual renewal process for customers and collate insights to enable ICAS to serve members relevant products and services.

## KPIs

1. A renewal rate of 65% by 1 January 2017
2. A customer satisfaction rate of 65% for the renewal experience.

## Objectives:

- Capture meaningful data that will help ICAS to drive engagement
- Communicate the benefits of ICAS to members at time of annual renewal
- Create a simple device agnostic user experience for customers paying subscription fees
- Reduce waste in the business process

## Quick navigation

When you create new pages in this space, they'll appear here automatically.

- Project initiation document
- Project team roles
- Benefit realisation tracker
- Risk log
- Meeting notes
- Research phase
- Design phase
- Evolving solution
- Decision log
- Retrospectives



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## Project team roles

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### Project Sponsor- @Carolyn Spencer, Director of Digital

The Business Sponsor is the project champion who is committed to the project, to the proposed solution and the approach to delivering it. The Business Sponsor is specifically responsible for the Business Case and project budget throughout. The Business Sponsor should be committed, supportive and available for the duration of the project, providing a clear escalation route.

- Owning the Business Case for the project
- Ensuring ongoing viability of the project in line with the Business Case
- Holding the budget for the project
- Ensuring that funds and other resources are made available as needed
- Ensuring the decision-making process for escalated project issues is effective and rapid
- Responding rapidly to escalated issues and being the ultimate point for resolution of conflict within the project
- Empowering the business roles within the project, to appropriate levels, within their responsibilities
- Keeping themselves informed of progress and issues, e.g. by attending demonstrations and asking questions of other roles who are more actively engaged

### Business Visionary – @Janice Hutchinson Director of Marketing

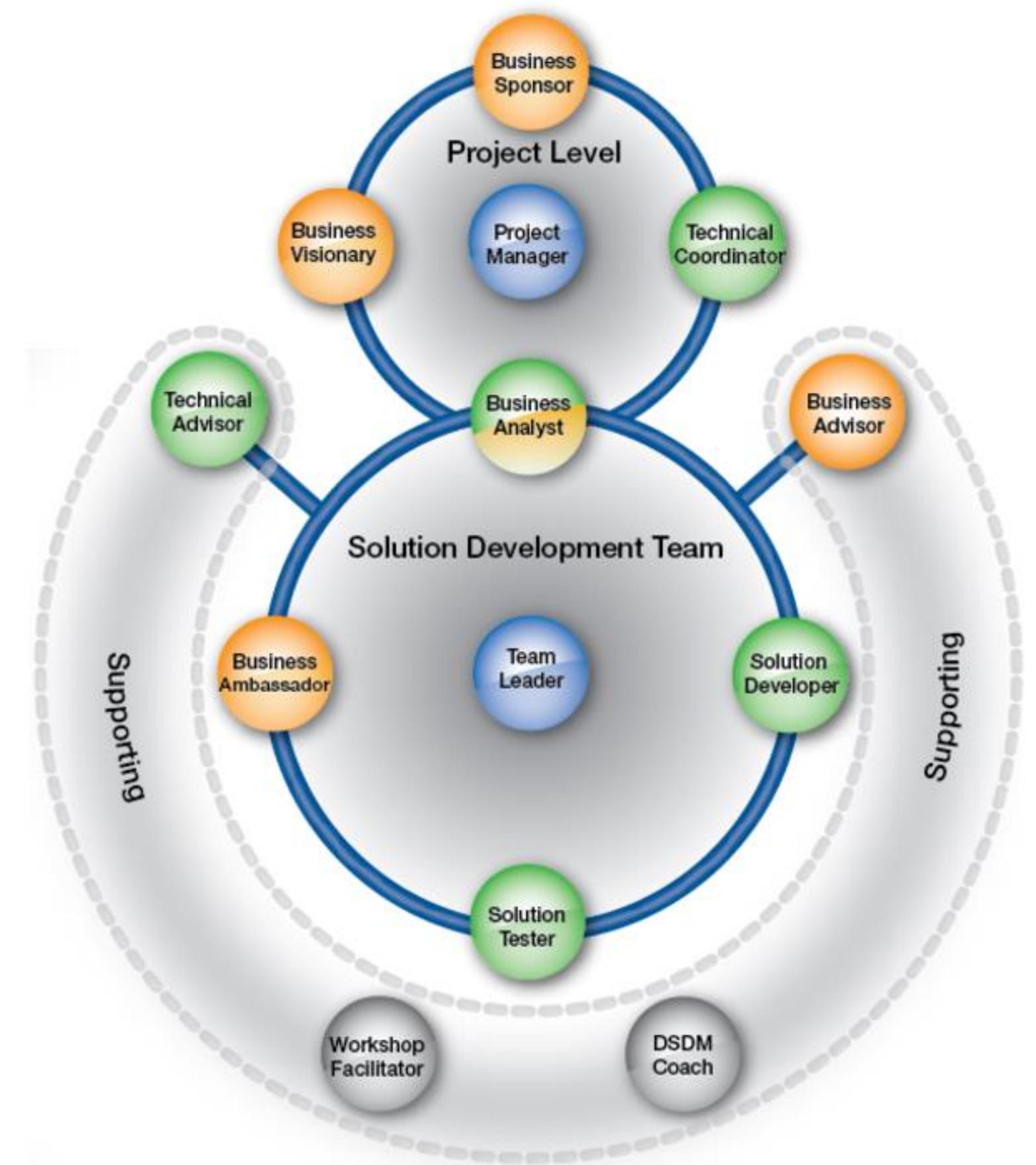
More actively involved than the Business Sponsor, the Business Visionary is responsible for interpreting the requirements of the project, communicating these to the team and ensuring they are properly represented in the Business Case. The Business Visionary remains involved throughout the project, providing the team with strategic direction and ensuring that the solution delivered will enable the benefits described in the Business Case to be achieved. At the end of the project, the Business Visionary will own the Deployed Solution and will be responsible for the realisation of any benefits associated with it.

- Defining the business vision for the project
- Communicating and promoting the business vision to all interested and/or impacted parties
- Monitoring progress of the project in line with the business vision
- Owning the wider implications of any business change from an organisational perspective
- Contributing to key requirements, design and review sessions, particularly where aspects of the solution being considered address key elements of the business vision Identifying and owning business-based risk
- Defining, and approving changes to, the high-level requirements in the Prioritised Requirements List, i.e. any change that affects the baselined scope or significantly alters the balance of priorities
- Ensuring collaboration across stakeholder business areas within the scope of the project
- Ensuring business resources are available to the project as needed
- Promoting the translation of the business vision into working practice, i.e. ensuring full business adoption of the solution created by the project
- Empowering the business roles within the Solution Development Team, to appropriate levels, within their responsibilities
- Where the Solution Development Team cannot agree, acting as an arbiter of business differences related to the business need and the way this is addressed in the Evolving Solution

### Project Manager - @Jenna McLauchlan, Digital Delivery Manager

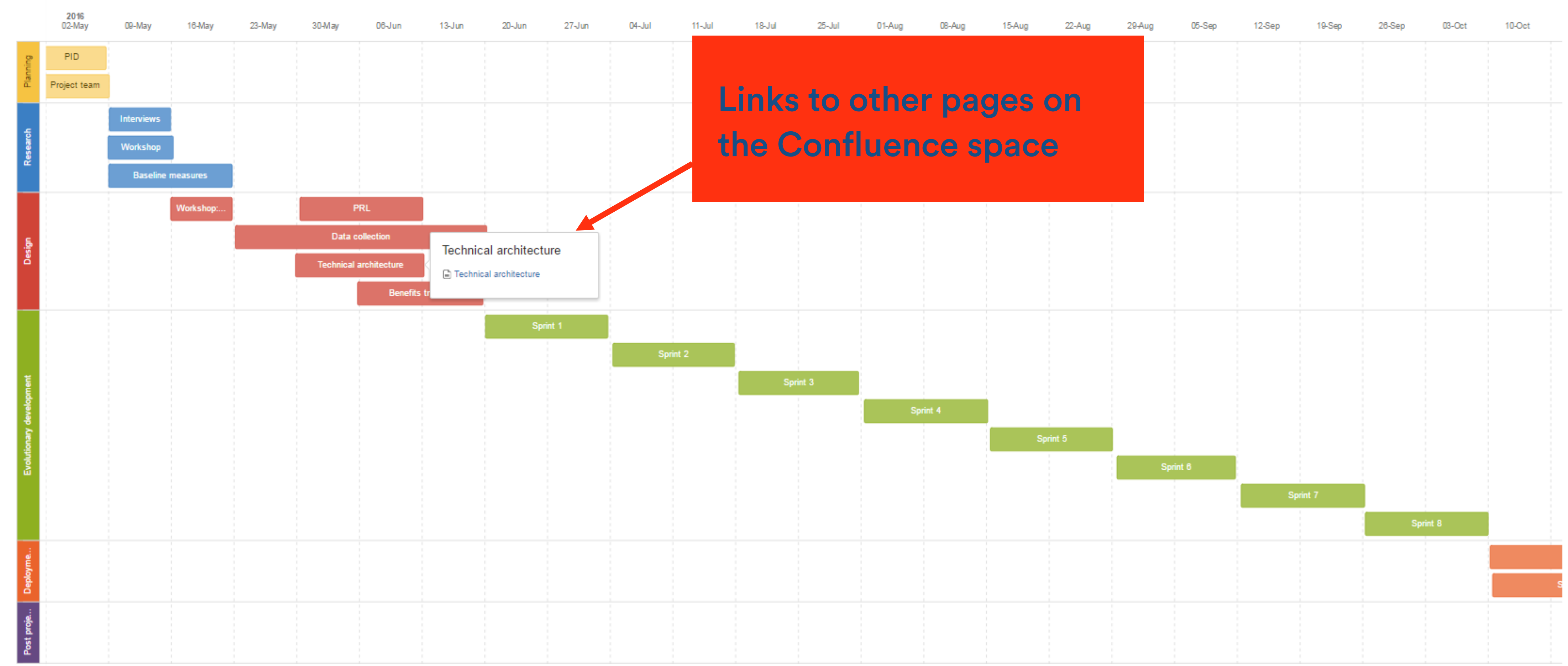
As well as providing high-level Agile-style leadership to the Solution Development Team, the role is focused on managing the working environment in which the solution is evolving.

- Ensuring effective and timely communication and provision of information to project governance authorities (Business Sponsor, project board, steering committee etc.) and stakeholders not actively engaged in the project with the agreed and appropriate level of frequency and formality
- Performing high-level project planning and scheduling, but not detailed Sprint planning or task planning
- Collaborating with the Solution Development Team and other appropriate stakeholders to create and agree the Delivery Plan (the schedule of Project Increments and the Sprints within them)
- Monitoring progress against the baselined Delivery Plan





### Roadmap



Links to other pages on the Confluence space

Technical architecture  
 Technical architecture

**Current Sprint**

Key	Summary	T	Created	Updated	Due	Assignee	Reporter	P	Status	Resolution
AR17-15	Provide initial page layout design		Jun 10, 2016	Jun 22, 2016		Steven Fullerton	Jenna McLauchlan	↑	DONE	Fixed



Annual Renewal 2017 ★

Pages

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Space tools - <<

### Current Sprint

Key	Summary	T	Created	Updated	Due	Assignee	Reporter	P	Status	Resolution
AR17-15	Provide initial page layout design	📌	Jun 10, 2016	Jun 22, 2016		Steven Fullerton	Jenna McLauchlan	↑	DONE	Fixed
AR17-37	Build home address fields	📌	Jun 16, 2016	Jun 22, 2016		Michael Allen	Jenna McLauchlan	↑	DONE	Fixed
AR17-42	Build password reset field - could have	📌	Jun 16, 2016	Jun 22, 2016		Michael Allen	Jenna McLauchlan	↓	DONE	Fixed
AR17-39	Build email address field	📌	Jun 16, 2016	Jun 22, 2016		Michael Allen	Jenna McLauchlan	↑	DONE	Fixed
AR17-41	Build membership information display fields - could have	📌	Jun 16, 2016	Jun 22, 2016		Michael Allen	Jenna McLauchlan	↓	DONE	Fixed
AR17-38	Build contact number field	📌	Jun 16, 2016	Jun 22, 2016		Michael Allen	Jenna McLauchlan	↑	DONE	Fixed
AR17-63	Set up server and application	📌	Jun 20, 2016	Jun 23, 2016		Trevor Cattle	Jenna McLauchlan	↑	DONE	Fixed
AR17-40	Validation of email address, including iMIS rules.	📌	Jun 16, 2016	Jun 23, 2016		Heather Douglas	Jenna McLauchlan	↑	DONE	Fixed
AR17-71	Email address deep-dive	📌	Jun 21, 2016	Jun 23, 2016		Jenna McLauchlan	Jenna McLauchlan	↑	DONE	Fixed
AR17-30	Member profile get	📌	Jun 16, 2016	Jun 23, 2016		Jonathan Stewart	Jenna McLauchlan	↑	DONE	Fixed
AR17-36	Build Name fields	📌	Jun 16, 2016	Jun 27, 2016		Michael Allen	Jenna McLauchlan	↑	DONE	Fixed
AR17-80	Autocomplete component	📌	Jun 27, 2016	Jun 29, 2016		Daniel Casserly	Daniel Casserly	↑	DONE	Fixed
AR17-77	Create validation test suite - Angular2	📌	Jun 23, 2016	Jun 29, 2016		Daniel Casserly	Daniel Casserly	↑	DONE	Won't Do
AR17-69	Manual entry of address	📌	Jun 21, 2016	Jun 30, 2016		Jenna McLauchlan	Jenna McLauchlan	↑	DONE	Won't Do
AR17-70	Set up iMIS test web	📌	Jun 21, 2016	Jun 30, 2016		Heather Douglas	Jenna McLauchlan	↑	DONE	Fixed
AR17-68	Search service and fill in of fields	📌	Jun 21, 2016	Jun 21, 2016		Michael Allen	Jenna McLauchlan	↑	TO DO	Unresolved
AR17-14	Build SPA framework	📌	Jun 10, 2016	Jun 21, 2016		Daniel Casserly	Jenna McLauchlan	↑	IN PROGRESS	Unresolved
AR17-43	Contact Name (Known as) Bug fix on iMIS	📌	Jun 20, 2016	Jun 29, 2016		Heather Douglas	Jenna McLauchlan	↑	IN PROGRESS	Unresolved
AR17-78	Add designation letters field	📌	Jun 23, 2016	Jun 29, 2016		Jenna McLauchlan	Jenna McLauchlan	↑	IN PROGRESS	Unresolved
AR17-76	Create validation service	📌	Jun 23, 2016	Jun 29, 2016		Daniel Casserly	Daniel Casserly	↑	IN PROGRESS	Unresolved
AR17-12	Build front-end application framework	📌	Jun 10, 2016	Jun 30, 2016		Jenna McLauchlan	Jenna McLauchlan	↑	IN PROGRESS	Unresolved
AR17-62	TESTING	📌	Jun 20, 2016	Jun 30, 2016		Jenna McLauchlan	Jenna McLauchlan	↑	IN PROGRESS	Unresolved
AR17-67	Build scaffolding	📌	Jun 21, 2016	Jun 30, 2016		Jenna McLauchlan	Jenna McLauchlan	↑	IN PROGRESS	Unresolved

23 issues Refresh

### Next steps

Description Due date - Assignee Task appears on





Blog

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PAGE TREE

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  - Current process review and project
  - Finance payments review
  - PC and cpd regulatory questions
  - Project Kick-off meeting
  - Question audit in AR meeting notes
- Research phase
- Design phase
- Evolving solution
- Decision log

Space tools

	reciprocal members (other bodies)					
Q52	additional info					to be web pages

### Action items

- @Lucinda MacFarlane to provide new list of practice and business job level options for Q33 & Q35 16 Jun 2016
- @Lucinda MacFarlane to provide new list of sectors for businesses for Q36 16 Jun 2016
- @Jenna McLauchlan to consult with @Susan Findlay and @Lucinda MacFarlane on the options and wording for Q38.1 30 Jun 2016
- @Janice Hutchinson to provide list of community interests for profile 26 Jun 2016
- @Jenna McLauchlan to obtain sign-off from Michelle Mullen on changes to Find a CA opt-out 30 Jun 2016
- @Janice Hutchinson to pick up on GAA and reciprocal member data 30 Jun 2016
- @Carolyn Spencer to confirm that the above changes to do need to be approved by exec. 16 Jun 2016

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meeting-notes design

### 2 Comments

- Jenna McLauchlan**  
Hello all, Just to highlight that I also found the research projects question which wasn't in the Aquila review that I've added to this as one to remove this is Q39.1. We didn't discuss yesterday but assuming its OK to remove. Thanks, Jenna  
Reply • Edit • Delete • Like • Jun 09, 2016
- Lucinda MacFarlane**  
Regarding Q15, I thought we agreed in the meeting that we should keep the secondary email address. This is vital as when the preferred email address fails, we can still communicate with the member. We only introduced the second email address a few years ago and it has had a huge impact on not losing touch and also hugely



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  - ET decision on AR
  - Profile will ask members for one
- Retrospectives

Pages / Annual Renewal 2017 / Decision log

Edit Save for later Watching Share

# Profile will ask members for one mandatory email address instead of two

Created by Jenna McLauchlan, last modified just a moment ago

Status	DECIDED
Stakeholders	@Janice Hutchinson @Carolyn Spencer @Lucinda MacFarlane
Outcome	To collect one contact email address for members, instead of the primary and secondary email address we have collected in the past.
Due date	23 Jun 2016
Owner	@Jenna McLauchlan

## Background

- Background to email address fields detailed in supporting document below.



- ICAS contact strategy focuses on making sure member data is correct and up-to-date there will be processes in place to reduce the number of inactive email addresses.

## Action items

- @Steven Fullerton to update the profile design with one email field instead of two 30 Jun 2016
- @Janice Hutchinson to ensure contact strategy includes activities to minimise out-of-date or invalid email addresses 31 Oct 2016

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decisions

Write a comment...



# Benefits

**Visibility**

**Supports culture**

**Reflection**





# Thank you!



**Jenna McLauchlan • Digital Delivery Manager • ICAS •**