

Atlanta SPIN

Software & Systems Process Improvement Network

The Atlanta SPINnaker

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Thriving - Organizationally and Individually - in a Post-Acquisition Environment

Todd Ague



Todd Ague

The majority of Atlanta SPIN members and guests work in a fast-paced and forever-changing environment. Our February speaker, Todd Ague of LexisNexis, Inc. (formerly ChoicePoint), shared his experiences and gave us valuable information and tips on how to succeed in such an environment.

Todd's presentation, entitled: "Thriving - Organizationally, and Individually - in a post-Acquisition Environment" covered many areas in a combined large organization. In his case, LexisNexis acquired ChoicePoint, Inc., and his subjects included everything from post-acquisition product selection, development team combinations, financing options, team cohesion, and success criteria.

A graduate of Wayne State University and the University of Michigan, Todd had extensive previous experience with acquisition models, his first being on the AOL management team during the merger with Time Warner. His duties then were also applicable to the combined Lexis Nexis organization. Todd currently serves as the Director of Online Public Records Search for LexisNexis.

Upon completion of the ChoicePoint acquisition, LexisNexis had many decisions to make, including selecting which products to keep, improve upon, and discontinue. Making such decisions can never be taken lightly, and involve numerous groups in the organization.

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Next Meeting - May 19, 2010 — 6:00 PM

Reducing Risk Through Effective Peer Reviews

Scott Banks, GTRI

Time: 6:00 PM—8:30 PM
 Location: La Quinta Inn & Suites,
 6260 Peachtree-Dunwoody Road,
 Atlanta, GA 30328



Scott Banks

Thriving - Organizationally and Individually - in a Post-Acquisition Environment

In Todd's case, there were several groups that played major roles. Finance was absolutely key in the decision making process. The previously-separate organizations had different accounting methods and ROI calculations. Understanding and arriving at the common accounting method was primary. Getting a grip on where the ROI and revenue were coming from was also paramount.

Marketing and business analysis teams need to collaborate with Engineering and QA organizations. In Todd's opinion, Engineering and QA needed to be, "super-served" - i.e. over-communicate, keep them involved and provide timely access to product timelines and expectations.

The Legal department needed to be involved at several points in the product combination cycle. Training is also involved, but usually occurred later in the process, after the product selection decisions had been made.

These joint meetings were mostly face-to-face. Face-to-face meetings are extremely important, if for no other reason to get the entire team together in an informal setting. People develop products, and people use products. People also provide requirements and changes to those requirements.

For the management roles, tracking decisions needed to be made once the teams were together. Finance needed to be in lock-step with the metrics and measurements. The metrics needed to be decided upon and documented. The metrics need to be documented so that when the project team hits the milestones, the success gets noticed, especially by the Finance organization.

For monitoring the projects along the way, a color-coded dashboard is very helpful. Todd demonstrated a "Red, Yellow, Green" system of tracking status:

- GREEN = Good as is - production ready
- YELLOW = Requires some development, input from combined teams
- RED = Lots of development needed, critical for combined organization

When an organization is acquired, the investor expectation is that the combined organization will realize significant cost savings, streamlined product development, and simplified management. In Todd's case, it could be easy to be a hero with cost savings, but if capacity is needed and not planned for, the entire team could be in big trouble. Risk mitigation is key. A 12-18 month timeline for success is usually standard practice.

As for project pitfalls, Todd offered several suggestions to avoid them:

1. Don't align strategy with reality - keep them separate.
2. Project Estimation is an Art - treat it that way. "If the organization is firing on all eight cylinders, and they say it'll take 3 months to do something, then double it."
3. Mergers and Acquisitions complicate things further. Expect delays and issues.
4. Document all bullet-points and timelines - they will save you later.
5. Communicate schedule-changes quickly. If there's bad news to give, do it promptly and deal with it.
6. Prioritize your requirements up front, but don't assume that the knowledge on the acquiring side is there. Do the P1, P2, P3 analysis, but also clearly-communicate what's there to everyone involved. If the stakeholders don't understand the value, they'll fight you on the priority. Communicate the value of what is being prioritized, not just the priority level.

As for Post-Operative reviews, Todd feels that they are extremely important. He found that it is best to do a Post-Op review on a small piece of the project, and analyze how it affected the larger organization. Include what went well, what could have been improved -"Plus/Deltas" are very important for larger projects that started initially with smaller efforts.

As for the individual side of things, Todd recommends to be proactive, identify problems, pitfalls and opportunities. Others will be doing this, so you might as well also. If you don't the politics will affect you, regardless.

Todd closed the presentation by giving several examples of big acquisitions where things went well, as well as awry

- AOL/TimeWarner
- Delta Air Lines / Northwest
- ValuJet/AirTran

Audience participation was excellent, and we thank Todd for his thought-provoking presentation.

Becoming a Leader When Working With Offshore and Distributed Teams

Hans Eckman

In April, Atlanta SPIN welcomed Hans Eckman to give a talk he titled, “Becoming a Leader When Working With Offshore and Distributed Teams”. The crowd comprised of Atlanta SPIN regular attendees as well as many first time visitors to our meeting. Mr. Eckman has 20 years of industry experience. 13 of those years have been spent implementing web-based software solutions for various different companies. To learn more about Hans Eckman visit <http://hanseckman.com>.

Hans started his discussion by asking a series of questions to get the audience’s feedback and participation started right off the bat (in fact, shouting out was encouraged in one of the first slides!). Outsourcing as a good idea or a bad idea was discussed. Mr. Eckman listed some reasons companies choose to outsource such as increased capacity, disaster recovery, and better value. In addition, a list of common American perceptions of outsourcing were listed such as lower cost and avoiding taxes or unions.

Hans then showed a slide of how he perceives the cultural changes and how that can challenge you as an employee in America working with offshore teams. He said as you travel from West to East across the globe there tends to be a loss of creativity and a greater emphasis on conformity. Hans also joked about how countries where English is a second language often do not understand the sarcasm that many Americans apply to their every day speech.

Hans took a lot of time to describe a slide entitled “Recommended Project Team Structure”. It graphically describes the primary and secondary communication between the onshore team and offshore team as well as the primary and secondary communication within the onshore and offshore teams. You’re encouraged to download the presentation at <http://www.atlantaspin.org/>

[meetinginfo.htm](#) because the slide is rather complicated to explain.

Mr. Eckman gave the following tips for achieving success with offshore teams:

- Create longer team member engagements and attempt to retain subject matter expertise

- Use modeling and lots of examples

- Use clear, unambiguous language and define your terms.

- Manage through short, actionable tasks

If you expect something, inspect for it

Mr. Eckman also offered the following advice to improve yourself and increase your chances of success:

- Understand the team you’re working with (onshore and offshore)

- Provide feedback especially when work is done well, don’t be afraid to compliment the work when done correctly






- Be open to self-criticism

- Volunteer for new project and challenges

- Share project successes with others so that you become the model that others are built on

Hans stressed you must understand your audience and the cultures of that nation in order to truly be successful. To lead, a person must take action and not wait for direction, take risks and learn from success and failure!

Atlanta SPIN would like to thank Hans Eckman for his wonderful presentation and his willingness to stay late answering questions from the audience. We encourage you to go to <http://www.atlantaspin.org/meetinginfo.htm> and download the PDF version of his presentation slides. Thanks to everyone who attended and we hope to see you next month!

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Process Improvement Sites:

Software Engineering Information Repository

<https://seir.sei.cmu.edu/seir/>, has over 30,000 registered users and is a forum used to contribute and exchange information about software engineering improvement activities, including CMMI.

The CMMI Process Improvement Yahoo! discussion group

http://groups.yahoo.com/group/cmmi_process_improvement/ is a forum used to contribute and exchange ideas about CMMI-based improvement.

BSCW Shared Workspace <https://bscw.sei.cmu.edu/pub/bscw.cgi/0/79783> is a forum used to contribute and exchange CMMI-related materials.

Information courtesy of SEI Customer Relations. Find out more about SEI Membership online at www.sei.cmu.edu/membership customer-relationships@sei.cmu.edu

About Atlanta SPIN, Incorporated

www.atlantaspin.org

The Atlanta SPIN organization was chartered in 1994. This group has been a force for software process improvement in the Atlanta area since then. The organization has a growing membership list that currently numbers 850+ members. The group typically meets every third Wednesday of the month. Our meetings typically attract audiences of 40 – 50 people. These meetings provide a forum for like-minded people, interested in learning from others and sharing their own experiences. There is time allowed before and after the meeting for networking among the participants, including a review from the audience of any job openings that are available. The Board, through its work with Sponsors, ensures that food and drinks are also available at no cost to the membership. Atlanta SPIN is a 501C3 non-profit corporation. Your contributions may be tax deductible and qualify for corporate matching contributions from your company.