

John Hancock Case Study

TRIBAL⁷
SCALE

America's largest wealth management provider embarks on a large-scale Agile transformation effort, led by TribalScale.

John Hancock's retirement planning team, responsible for providing and guiding retirement investments for millions of customers in the United States, was leading in the enterprise group retirement management, a \$500+ billion industry. However, in the face of increasing pressure to innovate, John Hancock wanted to transform into a modern, digital, and Agile organization capable of meeting and exceeding the growing demands of their customers.

Challenge

John Hancock's number-one position in the American group retirement management space was at risk due to their legacy system's inability to support the on-boarding of large-scale clients in a timely manner. Their challenge was therefore to modernize their systems to better support increased demand and remain competitive. Their goals were twofold:

- + Streamline and enhance on-boarding in conjunction with existing portfolio management.
- + Reduce manual and dated on-boarding processes, including faxing, transcribing, and manual alerts to ensure tasks were completed.

“Being paired with someone within the team with this level of knowledge was the best way for me to learn a new agile framework as opposed to only classroom style or having ad hoc external coaches.”

- JOHN HANCOCK,
RETIREMENT PLANNING
TEAM MEMBER

Solution

A TribalScale transformation involves hands-on collaborative work and coaching in Agile development and extreme programming (XP) in the context of a specific project. We thereby instill a sense of applicability and practicality to the engagement as all participants learn the new technologies, processes, and tools by doing. In this case the specific project was a modernization of the portfolio creation process for stable value portfolios, which account for 95% of all portfolios created.

- + **UNDERSTANDING NEEDS:** Our team, onsite at John Hancock, worked closely with internal stakeholders and users to clearly grasp their needs. This way, we were able to design and define a solution validated by those closest to the product itself.
- + **TECHNICAL DISCOVERY:** After landing on a potential solution, we conducted a discovery investigation to determine how we could architect the solution in such a way that it would align with the legacy system.
- + **EMBEDDED APPROACH:** With a dedicated team onsite, we provided day-to-day coaching and comprehensive delivery support to empower John Hancock's retirement services team to maintain and build upon their code once the engagement concluded.
- + **MODERN TECHNOLOGIES:** We built a microservices architecture on top of Pivotal Cloud Foundry with .NET Core for the APIs and React on the front-end. We also used Kafka as a persistent messaging system and events queue to streamline the extract-transform-load processes. This also worked to ensure the legacy systems aligned with new portfolio data and processes.

LEGACY TECH

- + Fox Pro
- + Biztalk
- + MS DOS console application

NEW TECH

- + .NET Core
- + React
- + Kafka
- + SQL Server
- + MongoDB
- + Pivotal Cloud Foundry
- + Concourse CI



Outcome

Together, we built a new portfolio creation product that streamlines and transfers the manual processes over to an online form that synchronizes with both the legacy and the new backend systems. By building in the context of a specific project, the team was able to embrace the principles of Agile and XP, and gain real expertise with a modern technology stack and new coding languages.

Being one of the first teams to practice Agile development at John Hancock, the group retirement services team overcame significant obstacles — gaining access and approval to use new technologies and the confidence to learn and practice the new ways of working themselves, rather than depending on other resources.

Since we completed the engagement, the team was featured in a company-wide town hall where they presented their takeaways and learnings from the Agile transformation. They have also written internal blogs about Agile transformation, highlighting and championing its benefits, and instructed at TribalScale's University Week.

This outcome — when teams become internal advocates for Agile, XP, and contemporary software development tools — is the ideal end-state of a TribalScale Agile Transformation. Creating fundamental, long-term, and positive change in how people approach their work is the reason we do this and we're very proud to have helped our customers achieve such a great result.

KEY RESULTS



Reduced the portfolio creation process from **10 minutes to 2 minutes.**



100% TDD coverage



78.6% stories accepted

“After every stand-up, having our team “Novo Quo” cheer always brought laughter to the team!”

- JOHN HANCOCK, RETIREMENT PLANNING TEAM MEMBER

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TribalScale is a global innovation firm that helps enterprises adapt and thrive in the digital era. We have years of experience in digital strategy, design, and multi-platform engineering and through agile practices, we transform teams, build best-in-class digital products, and create disruptive startups.

Whether we're righting the ship for another company or creating a fresh end-to-end solution, we innovate for a better tomorrow.

Contact us at: contact@tribalscale.com

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