

From Transformation to Triumph:

Optum Serve's Agile Journey at Scale

An Optum Serve-KnowledgeHut upGrad Detailed Case Study



Understanding the **Backdrop**



"SAFe® proved to be the catalyst for agility, visibility, and transparency, seamlessly integrating our initiatives, ensuring predictable deliveries, and consistently meeting our timelines."

-Amanda Warfield, VP Strategic Initiatives, Technology Services, Optum Serve



Towards Business Agility

At the crossroads of a transformative era, organizations must transcend traditional paradigms, with leaders serving as architects of adaptability and innovation. Optum Serve, a Federal Health Services entity, revolutionized its approach with SAFe® adoption guided by KnowledgeHut upGrad. This led to heightened team motivation, improved change request delivery, bug reduction, and enhanced business agility. This whitepaper highlights how embracing transformation in business strategies helps navigate the demands of the evolving digital era.

About Optum Serve

Optum Serve is the Federal Health Services business of Optum and UnitedHealth Group (NYSE: UNH), dedicated to collaborating with esteemed organizations such as the Departments of Defense, Health and Human Services, and Veterans Affairs. Its mission is to drive the modernization of the U.S. health system and enhance the health and well-being of the citizens of the United States.

Optum Serve is a partner with the Centers for Medicare and Medicaid Services (CMS), helping to maintain the CMS One Program Integrity (PI) system. One PI is the CMS enterprise resource created to identify, deter, and prevent all fraud, waste, and abuse activities across the agency.



One PI supports more than 2,100 users requesting over 54,000 monthly data requests, resulting in over a trillion dollars of savings and program integrity improvements.

One Program Integrity (PI)



The federal government's expenditure of over \$1 trillion annually on healthcare, including programs such as Medicare, Medicaid, and Veterans Affairs (VA) healthcare, necessitates the ongoing challenge of preventing wastage, fraud, and abuse.

In April 2010, the CMS established the Center for Program Integrity (CPI) to ensure the integrity of the Medicare and Medicaid programs. CPI's primary focus is on combating fraud, waste, and abuse (FWA) through the development of effective strategies and fostering partnerships with both public and private entities.

One PI emerged as a vital component of this initiative, serving as the Data Hub for FWA-fighting (Fraud, Waste and Abuse) data analysts. It facilitates access to the Integrated Data Repository (IDR) and offers a comprehensive suite of analytical tools via the One PI Portal. Through comprehensive training, help desk support, data analysis assistance, continuous system enhancements, and close collaboration with various federal agencies and law enforcement divisions, One PI has been instrumental in Safeguarding the Medicare Trust Fund.

The Need for Lean-Agile

Amidst rising citizen expectations and a dynamic CMS environment influenced by budgetary and legislative fluctuations, the introduction of Lean-Agile principles had become imperative. While a few programs had already adopted Scrum practices, the complexity and scale of CMS programs made longer-range planning, dependency identification, and mitigation challenging within the Scrum framework. Overcoming cultural barriers across the organization and its various contractors was another significant hurdle that the organization had yet to address.

In 2017, as CMS embarked on its search for a new approach, the Scaled Agile Framework® (SAFe®) emerged as the ideal choice, resonating with the organization's needs and objectives. Subsequently, in 2020, CMS rolled out a mandate for all system support contractors to adopt the Agile methodology.



At Optum Serve, we recognized that early integration and comprehensive testing were critical factors for success in our large-scale data integration project. With the federal mandate in mind and the need to minimize risk from the start, it became evident that following a waterfall approach would not be feasible. Embracing an Agile methodology provided us with the ideal framework to mitigate risks effectively and ensure project success.

-Amanda Warfield, VP Strategic Initiatives, Technology Services, Optum Serve

Optum Serve had been a trusted partner for more than 20 years, collaborating with the CMS and federal agencies to establish and uphold program integrity initiatives. The company now had to acknowledge that agility was not only crucial in technology but also across the entire organization. Moreover, within a year or two, it would need to stand-up an entirely new business model — one that would change the way intelligence, technology and scale are applied to enable evidence-based care decisions, streamline administrative transactions, and improve payment speed and accuracy.

Optum Serve needed to gear up to play a pivotal role as the business, technical, and product management integrator in facilitating the CMS's transition from Waterfall to Agile methodology—and do so within aggressive timelines.

The Focus



Recognizing the importance of flexibility and responsiveness, Optum Serve made a strategic decision to transition away from the Waterfall model. The adoption of the Scaled Agile Framework (SAFe®) by Optum Serve was driven by a clear focus on:



Happier, Motivated Value Stream Resources

Optum Serve aimed to create a positive and engaging work environment for its value stream resources. It sought to empower its teams, encourage collaboration, and foster a sense of ownership and motivation among the workforce.



Faster Delivery to Production

Optum Serve recognized the importance of delivering high-quality solutions to production in a timely manner. It aimed to streamline its delivery processes, minimize bottlenecks, and accelerate the time it takes to bring valuable products and features to market.



Bugs Reduction Using Test Automation and DevSecOps

Optum Serve wished to prioritize the reduction of bugs and the improvement of overall product quality. It was looking out for ways to ensure that defects are identified and resolved early in the development of the lifecycle.



Increase in Productivity

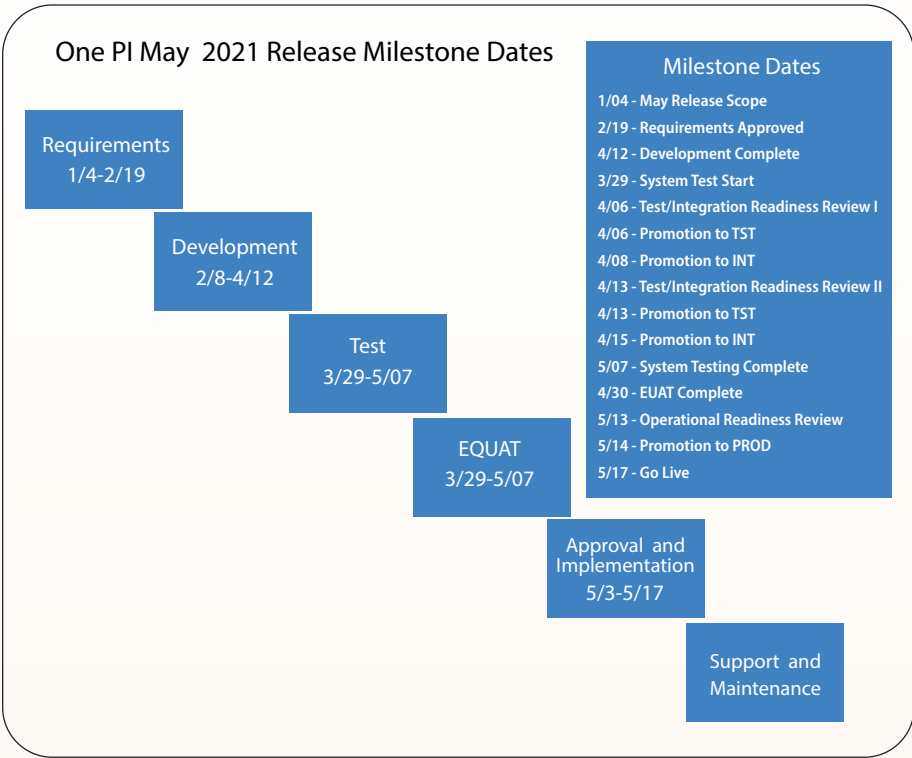
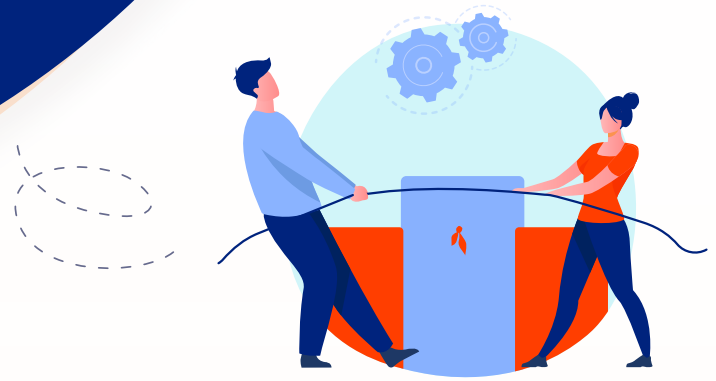
Optum Serve wished to establish clear roles, responsibilities, and processes. It aimed to eliminate inefficiencies, optimize resource utilization, and drive greater productivity throughout the organization.



Agility to Support Modernization and Remain Competitive

Optum Serve recognized the need to adapt to rapidly changing market dynamics and technological advancements. It was aiming to foster agility within the organization to quickly respond to customer needs, adopt new technologies, and remain competitive in the healthcare industry.

Key Triggers to Go SAFe®



Optum Serve's previous approach involved a Waterfall model, delivering products through quarterly releases with three-month cycle. However, the sequential nature of this model, along with the extended wait period and frequent changes in requirements and development requests, highlighted its limitations in providing agility and supporting modernization efforts.

The linear and sequential nature of Waterfall, with its rigid phase-by-phase structure, limited the capacity of Optum Serve to adapt swiftly to changing requirements or unforeseen circumstances.

This lack of flexibility resulted in delays in delivering solutions, as any modifications or adjustments had to wait until the subsequent phase, causing inefficiencies and missed opportunities for optimization.

The shortcomings of the Waterfall approach posed significant challenges for Optum Serve, impeding the ability to effectively meet the dynamic demands of its projects:

- ✔ Client feedback could not be included during ongoing development phases; it needed to wait until the product was complete.
- ✔ No changes could be undertaken during this phase, only errors could be rectified during this phase.
- ✔ The approach was not suitable for projects with frequent requirement changes or where external stakeholders need to provide periodic feedback.
- ✔ Consequently, verification and validation activities (testing) occur quite late in the development process.
- ✔ Deliverables and documentation consume a significant amount of project resources' time.
- ✔ Small changes or errors in the completed software may necessitate revisiting software development lifecycle phases.

The Obstacles



In order to stay competitive and adapt to the rapidly changing trends and customer demands, Optum Serve made a strategic decision to invest in SAFe® training. Scaling Agile through SAFe® provided it with a flexible approach to increase its Agile team and resources, particularly for complex projects. This transition enabled Optum Serve to enhance transparency, collaboration, and agility with both internal and external stakeholders, while fostering innovation to meet evolving business, functional, and technical requirements.

However, the adoption of SAFe® was not without its challenges. Optum Serve encountered several hurdles during the transition:

Seeking Shortcuts

To ensure the timely completion of the project, Optum Serve took an approach to adjust its strategy from the recommendations of the SAFe® Implementation Roadmap. The decision to not pursue SAFe® training, would however bring its own set of challenges.

During the first actual PI Planning event, Optum Serve assembled a large group of individuals, with around a quarter of them traveling from out of town. However, the first day of the event proved to be more chaotic and challenging than anticipated for various reasons:

- ✓ Underestimation of backlog refinement status and failure to follow all relevant aspects of the SAFe® Implementation Roadmap.
- ✓ Skipping Leading SAFe®, SAFe® for Teams, and SAFe® Product Owner/Product Manager training
- ✓ Lack of identification of Value Streams
- ✓ Simultaneous creation of the implementation plan and preparations for the Agile Release Train (ART) launch

These factors contributed to the difficulties faced during the initial day of the event, highlighting the importance of adhering to the SAFe® Implementation Roadmap and ensuring adequate training and resources are in place for a smoother implementation process.



Change Resistance

Initially, certain resources within Optum Serve were unsure about the benefits of transitioning to an Agile framework. Conquering this resistance entailed actively addressing their concerns, delivering transparent communication about the merits of Agile, and showcasing tangible benefits through the successful execution of Agile methodologies.



Culture Shift

Shifting from a traditional Waterfall model to an Agile framework involves more than just adopting new practices and processes; it requires a fundamental cultural shift within the organization. This cultural shift was challenging as team members were accustomed to a hierarchical structure, fixed roles and responsibilities, and a linear approach to project management. Lack of motivation and resistance to changing established work patterns further hindered successful adoption of Agile practices.



Lack of Training

Insufficient training and understanding of Agile practices hindered the transformation at Optum Serve. Skipping crucial training courses like Leading SAFe®, SAFe® for Teams, and SAFe® Product Owner/Product Manager led to a gap in the understanding of Lean-Agile fundamentals and posed a huge barrier in the successful adoption of SAFe®.

There was also a need to improve knowledge and proficiency in using modern Agile tools such as Jira, Confluence, TestRail, and Miro. Lack of coordination, collaboration, and transparency during the Agile adoption process added further difficulties.



A Haphazard Approach

Challenges arose when customers requested features outside the sprint cadence window, creating pressure on the team to sometimes commit prematurely. Managing non-feature work, such as system documentation, change requests, problem reports, and operation and maintenance documentation, proved to be challenging. Additionally, in a multi-value streams environment, different approaches suggested by resources added complexity to the overall implementation.

Despite these challenges, Optum Serve recognized the importance of addressing these issues and persevered in its adoption of SAFe® to leverage the benefits and drive successful Agile transformations within the organization.



The Transformation



To assist in its Lean-Agile transformation journey, Optum Serve brought in Lean-Agile transformation leader and Scaled Agile, Inc. Gold Partner, KnowledgeHut upGrad.

With KnowledgeHut upGrad's guidance, Optum Serve made the strategic decision to introduce the Scaled Agile Framework® (SAFe®) to a group that was entirely new to Lean-Agile concepts, rather than implementing it with teams already familiar with Scrum. This approach provided Optum Serve an opportunity to build its SAFe® foundation from scratch.



Building a Foundation

The organization interacted with the government team and commenced work on delivering solutions in an Agile manner, implementing key Agile practices:

- ✓ It encouraged collaboration among teams, ensuring regular meetings to foster transparency and address dependencies.
- ✓ It completed work in short iterations lasting two weeks, delivering thoroughly tested solutions at the end of each iteration.
- ✓ It conducted frequent demonstrations of completed work to enable short feedback loops
- ✓ The organization periodically reflected on how to become more effective, making necessary adjustments accordingly.
- ✓ It made a commitment to achieve technical excellence and good design to enhance agility.



SAFe® Implementation Roadmap

After experiencing the challenges and chaos during the first PI, Optum Serve recognized the need for a more structured approach to implementation of the Scaled Agile Framework®. It decided to adhere to the SAFe® Implementation Roadmap, which provided a clear framework for the Agile transformation. Agile best practices were documented and shared across its teams, ensuring consistency and alignment.

Optum Serve embraced the principles of SAFe®, leveraging them to guide their decision-making and promote a culture of agility. It also introduced Scrum and Kanban methodologies, tailoring them to fit its specific project needs. These methodologies provided a structured and transparent way of managing work, improving collaboration, and optimizing team productivity. With these efforts, Optum Serve successfully laid the foundation for a more organized and effective Agile delivery approach.



Dedicated Roles Established

Optum Serve established an Agile organizational structure with dedicated roles such as Product Managers, Product Owners, Release Train Engineers, Scrum Masters, and System Architects. Traditional project personnel and managers' titles, such as Requirements Manager, Development Manager, Testing Manager, Operations Manager, Business Services Manager, and Training Manager, were redefined to align with Agile principles.

The role of Epic Owner (Customer) was introduced, with Business Owners or Product Managers often taking responsibility for coordinating Program Level Epics on a case-by-case basis.



Value Streams Identified

Under KnowledgeHut upGrad's guidance, Optum Serve began adhering to the SAFe® Implementation Roadmap. It delivered Leading SAFe®, SAFe® for Teams, and SAFe® Product Owner/Product Manager training. Unlike the first PI, it now identified three Value Streams: **Shared Services, Analytic Services, and Technology Services.**



For the second Program Increment (PI), we discovered immense value in the identification of Value Streams and Agile Release Trains (ARTs). These aspects provided a significant benefit by helping individuals grasp their specific roles and where they fit into the overall structure. It also enhanced the understanding of how different teams collaborated and worked together to achieve our common goals.

-Amanda Warfield, VP Strategic Initiatives, Technology Services, Optum Serve



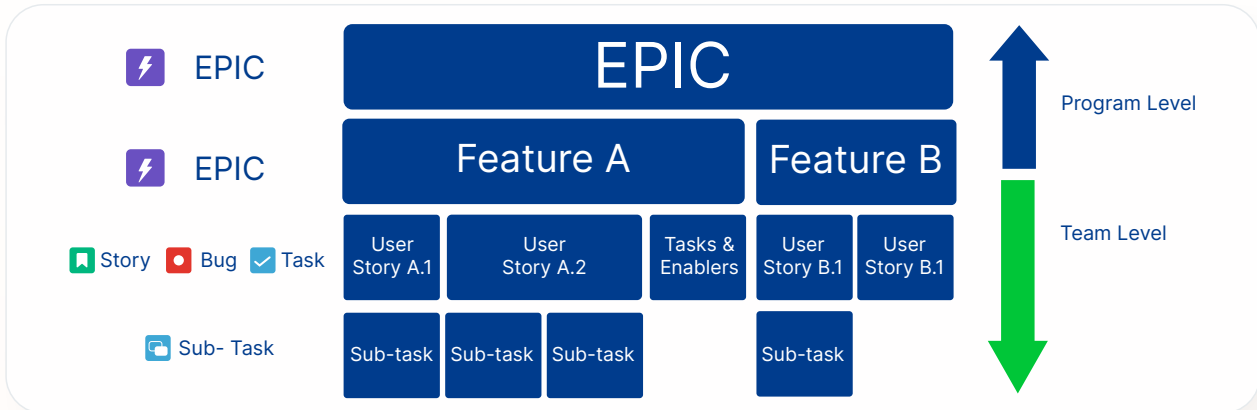
Objectives and Key Results

In Optum Serve's SAFe® implementation, the company followed a well-defined hierarchy of EPIC>FEATURE>USER STORY>SUBTASK. This hierarchical structure allowed Optum Serve to effectively organize and manage its projects.

- ✓ Customers owned the OKR (Objective and Key Results) through Objectives, Themes, and Initiatives.
- ✓ Epics were tagged to Initiatives and provided an overview of the hierarchy.
- ✓ Each feature encompassed two or more user stories, which captured specific requirements and functionalities.

- ✔ User stories were further broken down into sub-tasks, outlining the individual tasks or activities necessary for their completion.
- ✔ Team capacities and loads were estimated by considering the availability of Agile development team resources (excluding vacation, OOO or any shared responsibility to be accounted for).

This implementation hierarchy ensured a systematic and detailed approach to project planning, execution, and tracking, enabling Optum Serve to align with customer objectives, themes, and initiatives using OKRs (Objectives and Key Results).



Enterprise Tools

In its SAFe® implementation, Optum Serve utilized various tools and platforms to support its Agile processes and maintain essential documentation and artifacts:

Jira: The company documented and maintained all the Agile-based issue types, ensuring proper tracking and management. Additionally, it maintained dashboards in Jira to capture and monitor key metrics relevant to its projects.

TestRail: The healthcare services provider leveraged TestRail to manage and maintain its testing artifacts, including test case specifications, test cases, and test execution details. TestRail provided a centralized repository for organizing and tracking its testing efforts.

Miro: Optum Serve utilized Miro as a platform to create and showcase program boards during the program increment (PI) planning sessions. This visual collaboration tool facilitated effective communication and planning among team members.

SharePoint: The company relied on SharePoint as an internal documentation repository, providing a centralized location for storing and accessing important project-related documents and information.

EasyRetro: Optum Serve utilized EasyRetro as a retrospective repository, enabling teams to capture and track retrospective findings, actions, and improvements. This facilitated continuous improvement and reflection within its Agile practices.

Slido: The company incorporated Slido as a tool for confidence voting during the program increment. Slido allowed participants to provide their input and vote on various topics, fostering engagement and collaborative decision-making within the team.

Confluence: Optum Serve used Confluence as a platform to maintain and store all its deliverables and artifacts. This allowed for easy access and collaboration among team members.

By leveraging these tools and platforms, Optum Serve ensured efficient collaboration, effective documentation management, and streamlined processes throughout its SAFe® implementation.

The Game-Changers



To address the challenges faced during the SAFe® implementation, Optum Serve implemented several strategies that transformed its approach to agile delivery. These game-changing strategies encompassed comprehensive training, Agile coaching, adoption of modern Agile tools, fostering a cultural shift, and an unwavering commitment to continuous improvement.



Agile Coaching

Optum Serve engaged the expertise of the KnowledgeHut upGrad team, who provided SAFe® training and certification courses. The experienced Agile Coaches from KnowledgeHut upGrad guided the resources, sharing their deep understanding and real-time experience of Agile principles and practices. This coaching approach allowed resources to learn through hands-on experience, fostering continuous improvement and skill development.



Team Autonomy

Optum Serve empowered teams to self-organize and make decisions at the grassroots level. Individual value stream owners were entrusted with decision-making authority for their respective value stream activities. This approach promoted creativity, innovation, and high performance within the teams, leading to better agility and outcomes. Trusting program management allowed value streams to demonstrate their unique contributions throughout the product development and implementation stages.



Agile Tools Training

Optum Serve provided comprehensive training on Agile tools such as Jira, Confluence, TestRail, and Miro. Resources were equipped with the necessary skills to effectively utilize these tools and support agile delivery. The focus was on fostering a lean Agile mindset and ensuring that resources had the necessary training and coaching to successfully adopt Agile practices.



Communication

Optum Serve emphasized transparent and intensive communication about the change to ensure its acceptance throughout the organization. Positive experiences and the benefits of agile delivery were effectively communicated to generate enthusiasm and commitment among the teams.



Management Team Involvement

The management team played a crucial role in motivating employees to adapt to the new ways of working in agile delivery. Their support and active involvement helped create a positive environment for change and provided guidance and direction during the transition.



Application of SAFe®

Optum Serve implemented effective practices within the SAFe® framework. During PI planning, clear communication was established regarding committed and uncommitted features for the program increment. Regular discussions with customers were held through product owner-sync meetings or bi-weekly feature review meetings to track the progress of feature and story delivery. Non-feature work deliverables and documentation were tracked through tasks or relevant stories, tagged under the respective value streams for efficient delivery and tracking.

Any conflicts or different approaches were addressed through collaborative sessions with relevant resources, ensuring alignment and agreement before commencing the work. Clearly defined acceptance criteria were established for relevant issue types, ensuring that the organization met the expectations of the resources.

By applying these game-changing strategies, Optum Serve successfully addressed the challenges encountered during the SAFe® implementation, promoting a smooth transition to agile delivery and facilitating the achievement of desired outcomes.



The Wins



Boost in Team Motivation

With training and preparation, participants have been more engaged in PI Planning events after that first learning experience.

“Communication”, says Harry Narang, KnowledgeHut Enterprise Coach and SPCT, “has been critical to the acceptance of the new way of working”.

Especially in the early days, it had to communicate clearly and persistently to convince people to join in the effort and assuage fears about what this meant for their futures.

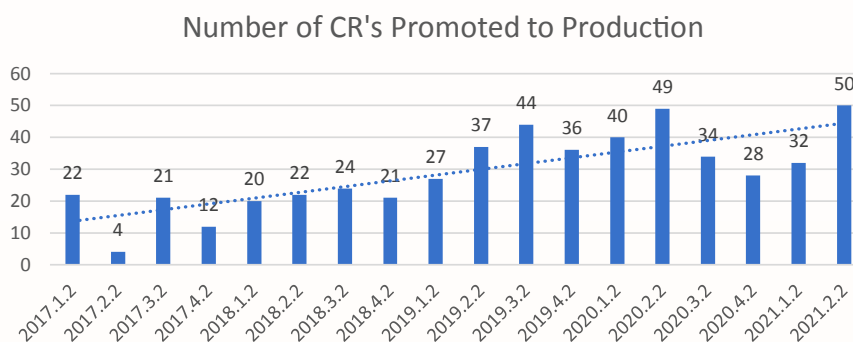
In anticipation of a PI, stakeholders can now objectively assess the value of work and prioritize, reducing emotional decision-making, according to Mr. Narang. Optum Serve is also adapting its budgeting process to align with shorter-term planning, transitioning from years in advance to three-month increments. This approach represents a middle ground between the traditional approach and the more flexible nature of Scrum.

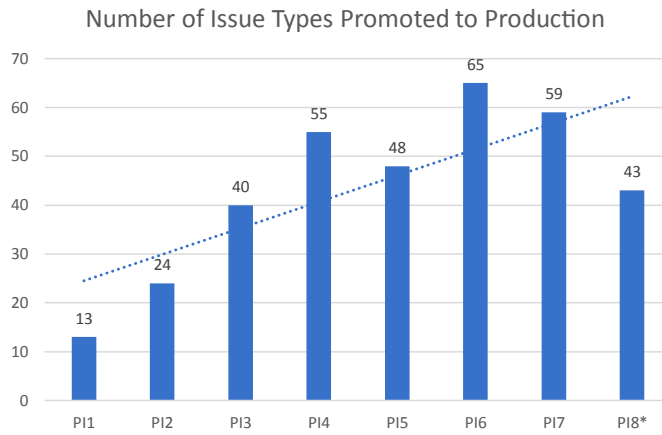
Surveys conducted before and after SAFe® show a **27% increase in employee satisfaction**.



67% More Change Requests Delivered Per Quarter

Implementing SAFe® enabled Optum Serve to deliver faster to production. Program Increments (PIs) consisting of 5 sprints and 1 Innovation and Planning event followed a 2-week cadence with iteration demos at the end of each sprint and a system demo at the end of each PI.



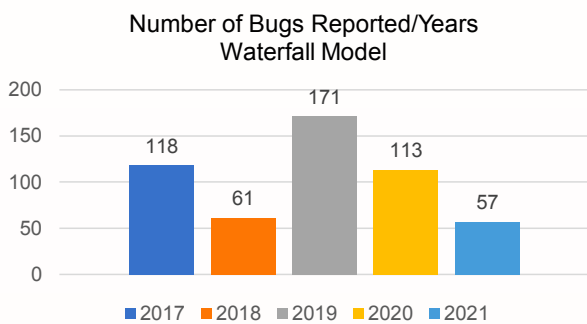


Feedback from stakeholders informed incremental delivery, ensuring scoped issue types were completed and accepted by the Product Owner for production deployment. Comparatively, the Waterfall model saw 523 change requests delivered over 18 quarters, while the SAFe® Agile model achieved 347 issue types in just 8 quarters, showcasing increased delivery productivity and efficiency.

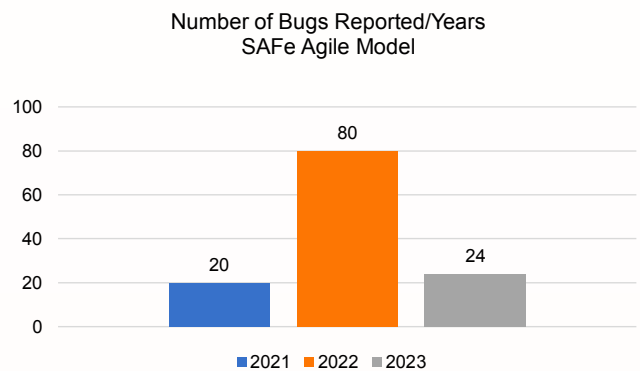


55% Increase in Bugs Reduction

In the SAFe® Agile model, Optum Serve witnessed a significant reduction in the number of bugs compared to the Waterfall model. The collaborative nature of SAFe® Agile, where value stream resources actively participated in daily standups and other Agile ceremonies, facilitated discussions on design and development before the testing phase. This proactive approach helped remove ambiguities and fostered a shared understanding among team members.



VS



Additionally, the implementation of test automation and DevSecOps practices through continuous integration and continuous deployment (CI/CD) activities further improved the quality of the developed products. Robust acceptance criteria for issue types ensured clarity and alignment on what needed to be completed and tested, contributing to a decrease in bugs.

Over 8 quarters, the SAFe® Agile model logged 124 bugs, averaging around 16 bugs per quarter. In contrast, the waterfall model experienced 520 bugs over 18 quarters, averaging about 29 bugs per quarter. This substantial reduction in bugs showcases the effectiveness of the Agile approach, emphasizing collaboration, early testing, and continuous improvement.



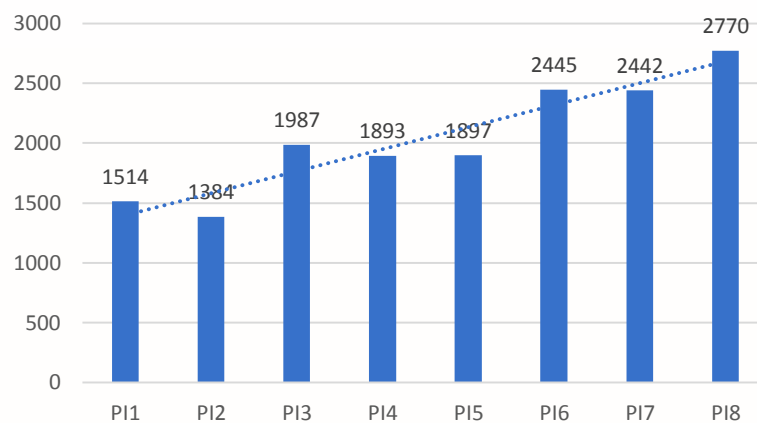
Increase in Productivity

With the introduction of test automation and DevSecOps practices, the number of reported bugs reduced significantly. This, in turn, resulted in happier teams and a more efficient delivery cycle.

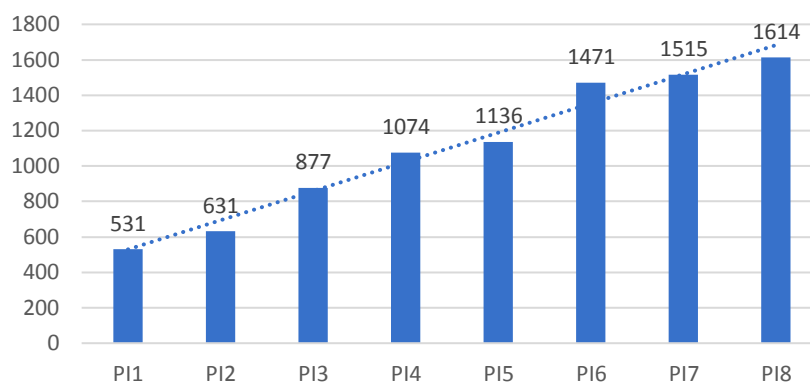
The clear definition of PI objectives, product strategy, roadmap, backlog, sprint planning, as well as the well-defined EPICs, features, stories, and tasks, eliminated silos and enhanced collaboration among value stream resources. This improved alignment and streamlined workflow contributed to increased productivity.

Adopting a two-week cadence for delivering developed products to production enabled faster decision-making and swift acceptance of user requirements. The SAFe® framework facilitated quick and efficient delivery, ensuring that customer needs are met promptly.

Total story points



Total (Jira) Issue types included



Program Increment (PI)	Total story points completed
PI1	1514
PI2	1384
PI3	1987
PI4	1893
PI5	1897
PI6	2445
PI7	2442

Furthermore, productivity has seen incremental growth, evident in the increase in scoped story points across the different PI iterations. This steady progression highlights the effectiveness of the SAFe® model in optimizing productivity and achieving successful outcomes.

As Optum Serve continues to leverage SAFe® and refine its Agile practices, the focus on productivity remains a priority, aiming to further enhance efficiency and value delivery to customers.



Enhanced Business Agility

By successfully adopted the Scaled Agile Framework (SAFe), Optum Serve has experienced a multitude of benefits. This adoption of SAFe has allowed Optum Serve to transform its operations and embrace an Agile mindset, enabling the organization to respond quickly to customer needs, deliver high-quality solutions, and stay ahead in the competitive healthcare industry.

Key measures taken by Optum Serve to increase business agility:

- ✓ Transitioning from siloed teams to cross-functional Agile value streams that support agile delivery
- ✓ Introducing API-based product delivery owned by value streams, enabling the delivery of modern API-based solutions
- ✓ Adopting modern technologies like Snowflake, Databricks, GitHub, continuous integration, continuous delivery/deployment, test automation, and DevSecOps to support modernization efforts
- ✓ Introducing API-based product delivery owned by value streams, enabling the delivery of modern API-based solutions
- ✓ Migrating all data analytic tools used by One PI to an AWS-based cloud environment, ensuring scalability and flexibility
- ✓ Exploring the introduction of artificial intelligence, machine learning, low/no-code platforms, and other data analytic tools to enhance our program offerings (medium to long-term vision)

By embracing modernization initiatives and maintaining a competitive edge, Optum Serve is now well-positioned to deliver innovative solutions and meet the evolving needs of its customers and end-users.



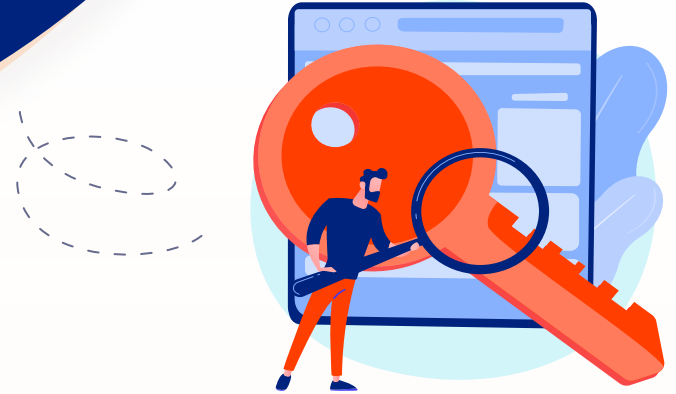
Better Enablement of Modernization

Optum Serve's commitment to agility drives its support for digital transformation initiatives and its ability to swiftly meet customer and user needs. It has embraced core competencies that include valuing individuals and interactions, prioritizing the delivery of value within shorter timeframes, and ensuring high-quality outcomes for customers and users:

- ✓ Emphasis on individuals and interactions, prioritizing value delivery within shorter lead times, and ensuring high quality
- ✓ Focus on working software over comprehensive documentation while still meeting customer and user needs
- ✓ Focus on working software over comprehensive documentation while still meeting customer and user needs
- ✓ Collaboration with customers through regular interactions and engagement channels
- ✓ Engagement with users through the Program Integrity Data User Group (PIDUG), training sessions, surveys, and help desk support
- ✓ Responsiveness to change and adaptation of plans through Agile Release Train (ART) and Program Increment (PI) execution
- ✓ Agile teams known as value streams operating based on Agile Release Train activities and clear PI objectives
- ✓ Commitment to high-quality outcomes through training, tools, and methodologies such as test automation and DevSecOps

By adopting the Agile model, the delivery-to-production activities of Optum Serve have improved, and it is still enhancing its agile delivery process to promote more issue types to production. As the company migrated its tools into a cloud-based production environment, it is seeing more issue types go into production often.

Key Takeaways



Optum Serve's successful adoption of Agile methodologies and the significant outcomes achieved have garnered attention from other teams within the organization. As a testament to its progress, other programs within Optum Serve have approached it for guidance on driving similar results. This highlights the remarkable transformation that Optum Serve has undergone in the past year.

The following key takeaways provide insights into its journey and offer valuable lessons for organizations embarking on their own Agile transformations. From the importance of leadership commitment to the value of coaches and collaborative workspaces, these takeaways shed light on the strategies that propelled Optum Serve's success and can guide others in their pursuit of agility and continuous improvement.



Transformation Begins with Leadership

Optum Serve's success in embracing Agile methodologies and driving positive outcomes is attributed to the commitment of leaders who spearheaded the change. Sending leaders for SPC training enhances their understanding of Lean-Agile principles and enables effective transformation.



Coaches are Invaluable

Optum Serve recognized the significant value of Agile coaches in guiding and supporting teams throughout the transformation process. Their expertise and guidance play a crucial role in helping teams adapt to the new way of working.



Foster Collaborative Workspaces

Optum Serve recognizes the importance of creating collaborative work environments that facilitate face-to-face interaction. Such spaces enable teams to capture the full value of collaboration during PI planning events and day-to-day work.



Emphasize a Sense of Urgency

Optum Serve acknowledges the importance of establishing a sense of urgency and setting near-term goals to drive the transformation. Following the SAFe® Implementation Roadmap and adhering to a clear roadmap helps maintain momentum and progress.



Engage Employees and Prioritize Support

Optum Serve places great emphasis on engaging its employees throughout the transformation journey. Its approach to change with empathy, leveraged the support of management and coaches, and ensured employees remain motivated and excited about the transformation.



Start with Essential SAFe®

Optum Serve understands the value of starting with Essential SAFe® to simplify the initial program and ensure a focused and manageable start. Learnings from this phase can then be applied to larger programs with multiple Value Streams, enabling a smoother and more effective scaling process.

The Way Forward

Optum Serve has achieved remarkable success in implementing Agile methodologies at an enterprise level. With three Agile Release Trains (ARTs) and over 200 Lean-Agile teams, the organization has created a pervasive Agile ecosystem that extends beyond IT to functional and business portfolios.

This widespread adoption of Lean-Agile values and practices has not only transformed the way Optum Serve delivers for its customers but has also influenced hiring processes, budgeting, and overall business operations. The Agile mindset has become deeply ingrained in the organization, driving continuous improvement and extending the reach of agility further into the business.

Optum Serve's customer-centric focus, organizational alignment, and its commitment to ongoing improvement serve as a testament to the transformative impact of Agile methodologies when embraced wholeheartedly. Optum Serve's success story inspires others to embark on their own Agile journeys and reap the benefits of delivering value in an efficient and customer-centric manner.

"This way of working has spread across the organization," says Amanda Warfield. "It has revolutionized our customer delivery processes, how we approach hiring and talent acquisition, and our budgeting practices and is continuously extending further and further into the business for the better."

Want to drive organizational transformation? Get in touch!

About KnowledgeHut upGrad

KnowledgeHut upGrad is a Digital Transformation Partner to organizations helping them tackle their most important transformation challenges and capture their greatest opportunities through Lean-Agile approaches. We deliver solutions through leading-edge consulting and professional reskilling and upskilling programs via our signature outcome-based immersive learning.



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About Optum Serve

Optum Serve, Optum and UnitedHealth Group (NYSE: UNH)'s the Federal Health Services entity, partners with government entities like the Departments of Defense, Health and Human Services, and Veterans Affairs. As a partner of the Centers for Medicare and Medicaid Services (CMS), Optum Serve maintains the CMS One Program Integrity (PI) system.



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