



The Global Voice of Quality®

MyASQ Finance Update

August 17, 2018

Hello member leaders,

The myASQ Finance team has made progress in its collaboration with Billhighway on the customization of the new financial tool for member units. The team has weekly calls with Billhighway to discuss strategy and configuration. The verification of current member unit financial information is almost complete. The last five regions will be completed during the current sprint. The team also welcomed two new stakeholders to the project.

Key Project Objectives:

Billhighway will implement consolidated banking and expense management functionality throughout ASQ sections and divisions, eliminate local bank accounts and systems, and create oversight while maintaining local administration. Another goal is to automate the current manually-intensive process of section and financial reporting back to the financial management team at ASQ HQ, so that payments may be processed at local section and division levels.

Billhighway's initial steps were to determine the scope and timing of the project, and review the discovery questionnaires filled out by the myASQ Finance team. The team will have in depth discussions regarding accounting and banking processes they would like to see in the new tool next week. And finally, the team and vendor are working together to finalize the implementation approach.

Billhighway is entering the Solution Development phase where they will configure specific issues to address ASQ financial management and build partner integrations. Then functional testing will take place, followed by pilot section testing, and then deployment.

myASQ Finance Team:

When the myASQ Finance team was formed in early spring, members from five different workgroups, IT, Finance, Community Development, Communications, and Organizational Excellence, attended agile training in preparation for their roles in the myASQ Finance project. The team began using a scrum methodology, and identified a project owner, scrum manager, and those who would serve as the development team.

For those not aware of scrum methodology, it is a specialized agile method that uses the term sprint for its development cycles. The team decided to use two-week sprint cycles to begin developing the new myASQ Finance management tool for member units. The scrum approach includes identifying all of the project's requirements, the team calls them stories, and then divides and prioritizes them.



The Global Voice of Quality®

All team members attend brief scrum meetings each day. Those meetings help to keep the project on target. During the daily meetings, members review that they completed yesterday, what they will work on that day, as well as identify any impediments to progress. This helps the team to quickly adapt to any changes that need to be made to the sprint goal.

During each sprint, the development team creates a functional part of the product. That part is not allowed to be declared “done” until the product owner accepts it. At the end of each sprint, the team holds a sprint retrospective to evaluate the sprint and look for ways to improve the next sprint. When one sprint ends, another one begins the next day.

Progress Report:

In early sprints, the myASQ Finance team filled out 13 separate questionnaires from the vendor, Billhighway. There was a total of 50 questions about the organizational structures of the sections and divisions, revenue management, payments, and accounting processes.

The team identified an Alpha group to serve as stakeholders. The group included Erie, PA which represented a small section, Milwaukee, WI, which represented a medium sized section, and Fort Worth, TX, which represents a large section. Additional stakeholders were identified, including member leaders who were also working on identifying needed changes in ASQ financial management. Later, Billhighway suggested additional stakeholders from Canada and Mexico be identified. The team then added Rosa Manzano from ASQ Latin America and Phil Grandy from the Ottawa/Ontario section.

The team held initial calls with all stakeholders and scheduled sprint reviews at the end of each two-week sprint. During these reviews, the team presents progress that has been made, asks for suggestions on prioritizing upcoming tasks, and answers any questions. So far, the team has held six sprint reviews, with mostly positive feedback from all stakeholders.

Early on, the team created a communications strategy. It was determined that a myASQ Finance Update would be included in *Friday Fast Facts* every other week. In addition, myASQ Finance Frequently Asked Questions (FAQs) would be updated on a regular basis.

Members of the team worked on verifying the most recent financial reports from sections in each region. They checked financial reports against bank statements for checking, savings, money markets, certificates of deposits (with maturity dates), PNC and Invest in ASQ accounts. They entered that information into a spreadsheet. So far, regions 1



through 10 have been completed. The remaining sections in regions 11 through 15 will be finished in the current sprint, which ends on August 30, 2018.

Next steps:

In upcoming sprints, the team plans to create a map the new chart of accounts developed during 2019 budgeting, various balance sheets, budget templates, payment procedures including recurring payments, vendor reports, pre-paid credit cards, and much more.