

Agile Training

November 13, 2020

Introductions, Path and Goals

Introductions – Lauren and Gene

- Ohio-based.



- Small company.



- Pragmatic.



- Values over practices.



- Driven by delivery, not money.



- Engineering + business psychology.



- PMI's Agile Formation Steering Committee.



- Over 35 custom enterprise level transformations.

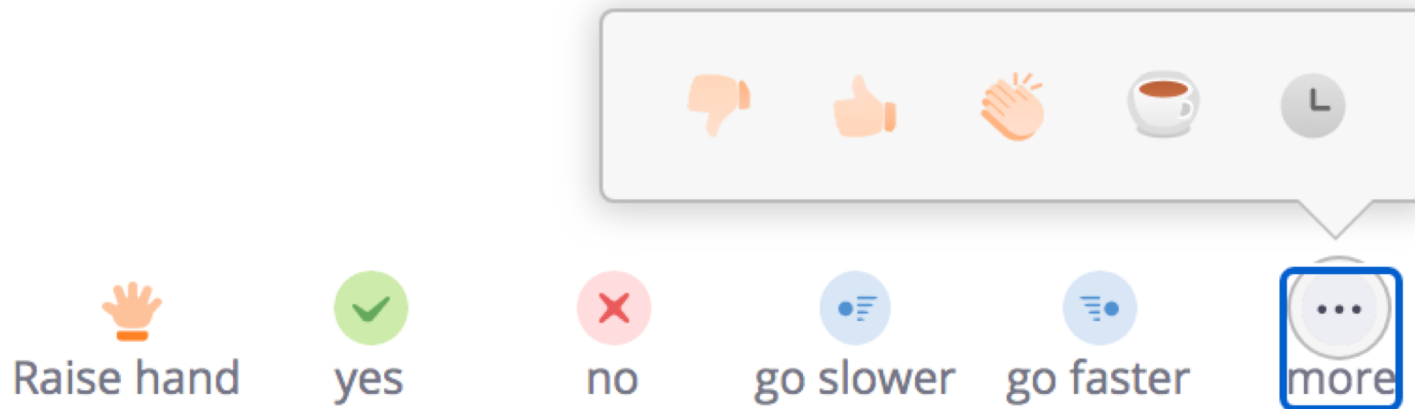


- “Adapt what is useful, reject what is useless, and add what is specifically your own.” – Bruce Lee



Session Guidelines

- Parking Lot.
- What other suggestions do you have?
 - Start on time?
 - End on time?
 - Asking questions?
- Use of Zoom tools.



Our Path

- Introductions
- Change
- Agility

15 min Break

- Innovation
- Flow
- Teams

15 min Break

- Leadership
- Next Steps
- Close

Change?

**Slumber
Bed
Dream
Quiet
Nap**

**Pillow
Night
Blanket
Pajamas
Snooze**

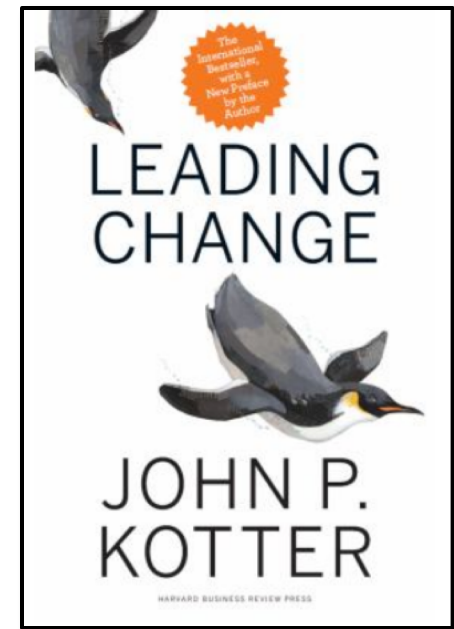
Mental Models

- Deeply held internal images of how the world works.
- Familiar and comfortable ways of thinking and acting.
- They are active, and powerful.
- They shape how we act by affecting what we see.
- Many were always **flawed**.
- They can **hide**.
- If so, they remain unchanged, the gap between them and reality widens, increasing their **negative** effect.
- People in close knit groups are **extremely vulnerable**, since they look to each other for standards and best practices.



Change

- Is hard.
- Change that is forced **does not survive**.
- We need answers to:
 - Why change?
 - Why change now?
 - WIIFM?

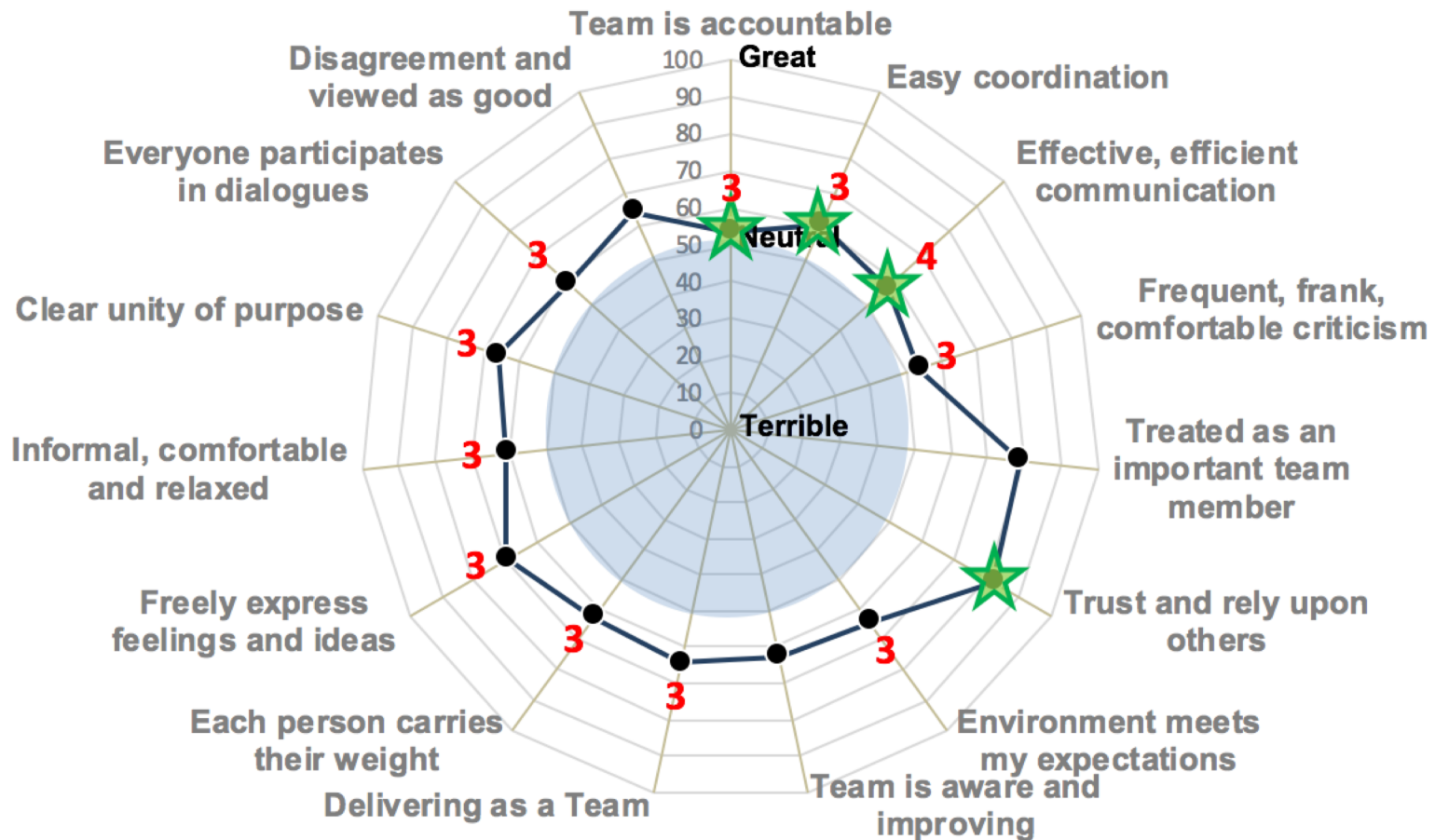


Our Sense of Urgency

Here at PFK OMD we have a unique story...

- Tremendous **purpose**, strong **mission**, significant **benefits**.
 - Seeking better outcomes, sustainable cost, good healthcare experience.
 - **Great people, wanting to do more.**
 - A sense of moving slowly, like pushing a glacier, uphill.
 - Little transparency or traceability from mission to daily work.
 - Everything seems nebulous, with delays and frequent meetings.
 - Are Team members motivated, satisfied, happy?
 - Lack of achieving “Done”.
 - Hard to tell our value story.
 - Weak leverage at times.
 - Lack of continual alignment.
 - High levels of work in progress and multi-tasking.
-

Within Our Team (OMD)...



Average

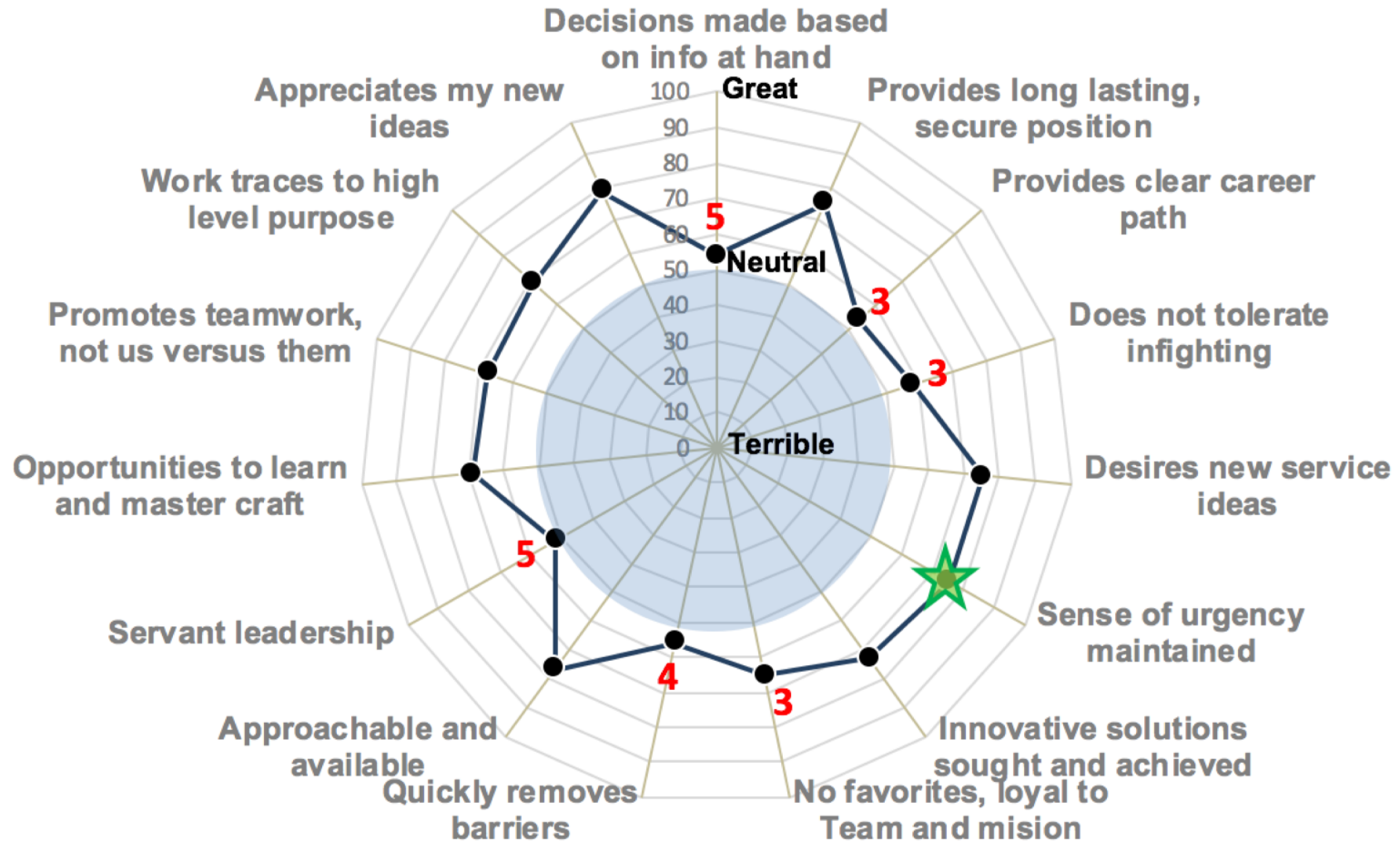


Tight Grouping



Number of No's and Perhaps Not's, >2

Our Leadership...



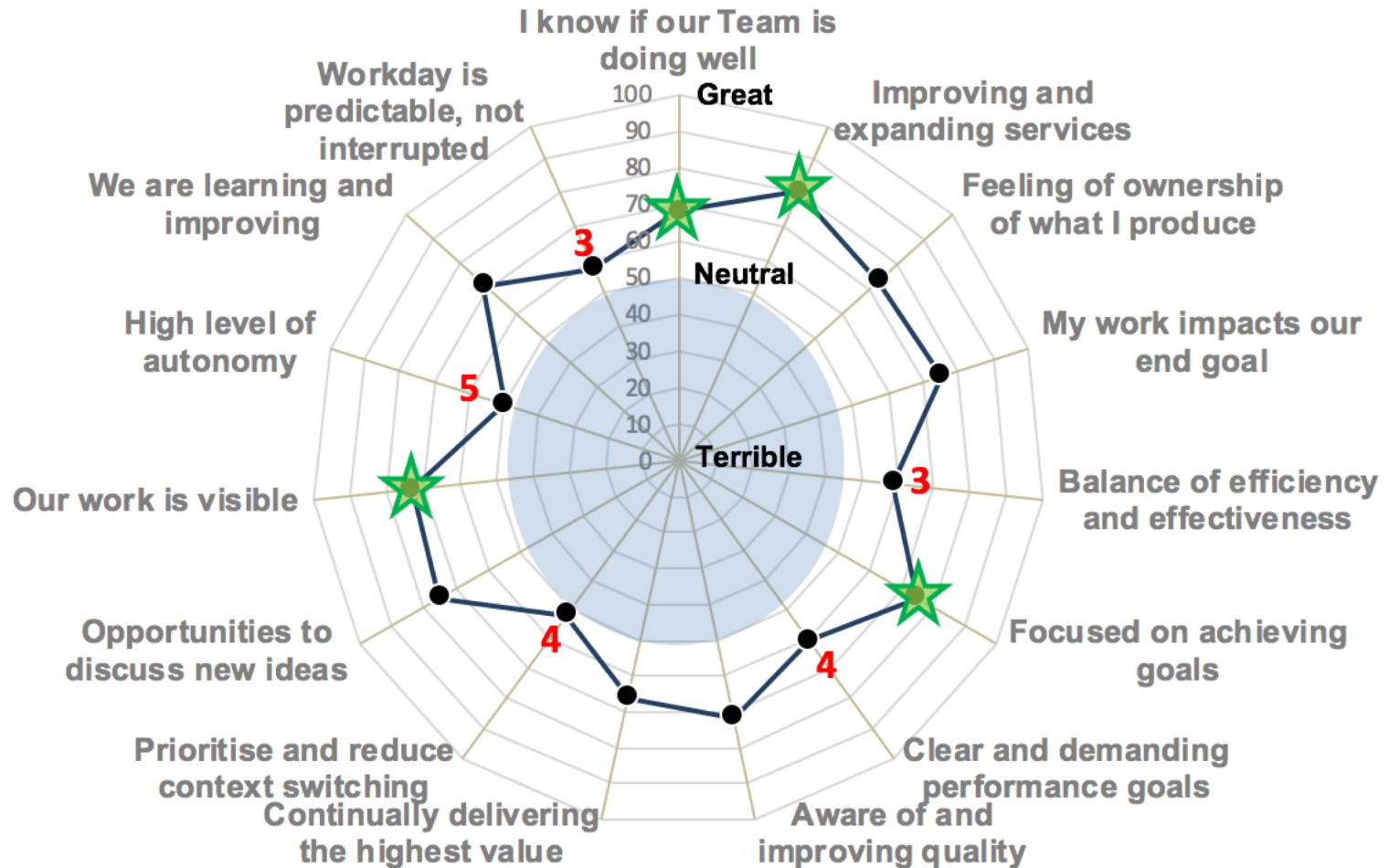
Average



Tight Grouping

N Number of No's and Perhaps Not's, >2

Our Delivery...



Average



Tight Grouping



Number of No's and Perhaps Not's, >2

Comments, Problems, Issues - What to Do?

- Keep a clear, consistent focus.
- Understand the value, then prioritize, to avoid constant pivoting.
- Increase effectiveness of meetings.
- Decrease the number of meetings.
- Avoid large groups in the weeds.
- Increase leadership alignment enabling consistent, helpful input.
- Improve the level of trust from leadership.
- Eradicate micromanagement and increase autonomy.
- During this time of COVID, reconsider working remotely.

Agility?

What is Agile?

- As an adjective?
 - **Nimble** - quick and exact in movement and thoughts; able to adapt to changes quickly and easily **with a sense of purpose**.
- As a solution delivery tool?
 - A lightweight framework that provides the ability to both **create and respond to change** in order to profit in a turbulent business environment.
 - There are many flavors of Agile, Scrum is one.
 - Differ in simplicity, frequency of feedback, and rigor.
 - **Incremental** release strategy, **iterative** work strategy.
- More than a set of practices –
 - It is **something you become**, not something you do.



What is Agile?

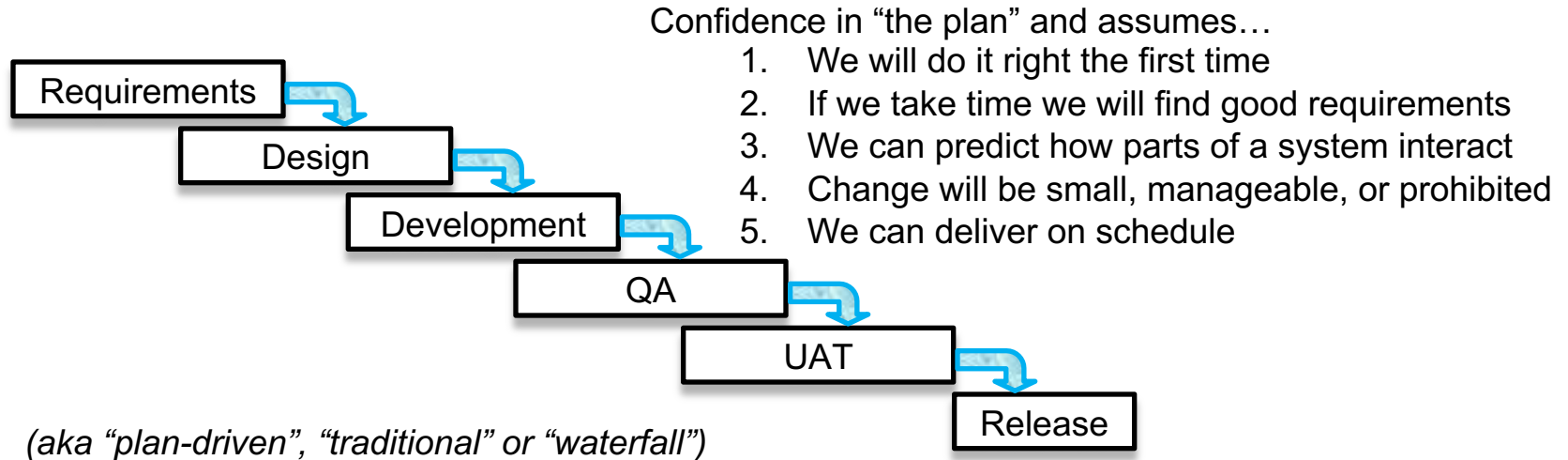


Agile Principles (the 5 top ones for us)

1. **Welcome changing requirements**, even late in development.
2. **Deliver working solutions frequently**, from a couple of weeks to a couple of months, with a preference to the shorter timescale.
3. **Simplicity** the art of maximizing the amount of work not done.
4. The best ideas and solutions emerge from **self-organizing teams**.
5. At regular intervals, the Team **reflects** on how to become more effective, then tunes and adjusts its behavior accordingly.

Defined versus Empirical Process Control?

- Agile is founded on **empirical process control theory**, rather than **defined process control theory**.
- Defined process control theory asserts that **given a well-defined set of inputs, the same outputs are generated every time**. A defined process can be started and allowed to run until completion, with same results every time.



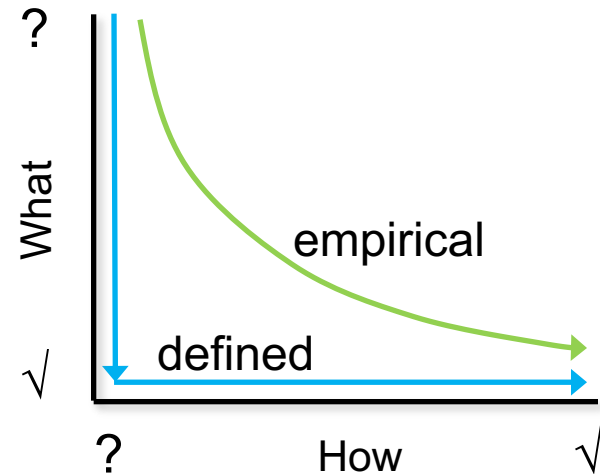
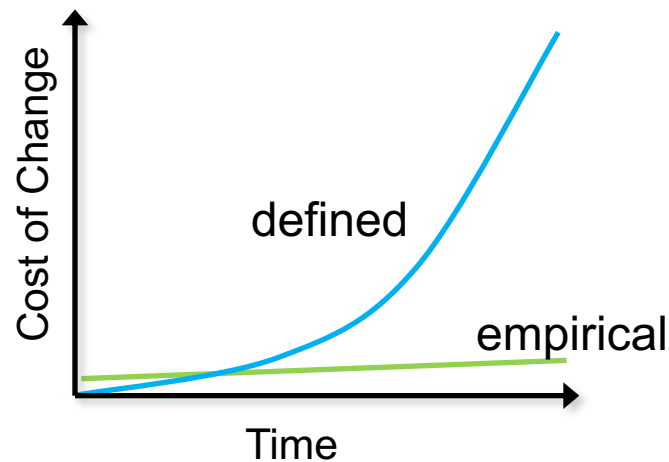
Defined versus Empirical Process Control?

- Empirical process control theory (aka Agile) asserts that **knowledge comes from discovery, feedback and experience** and making decisions based on **what is known at the time**.
- Agile has an **iterative, incremental** approach and timeboxes to optimize predictability and control risk.
- Agile requires
 - **Transparency**
 - **Inspection**
 - **Adaption**
- Agile is **3x more likely to succeed** than traditional projects.



Why Agile?

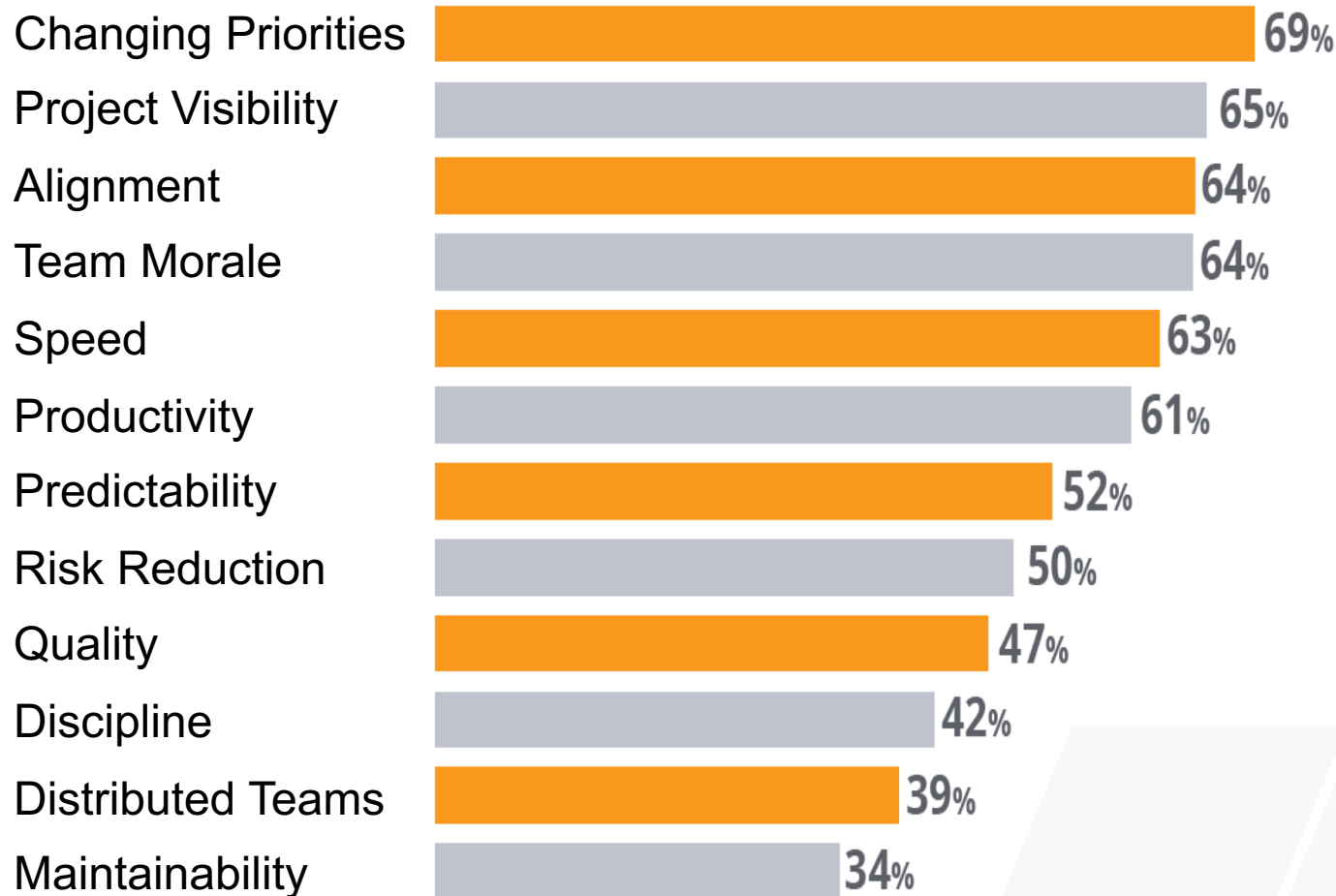
- We can dramatically reduce the cost of change...



... simply by proactively, explicitly, continually **expediting feedback**.

- **All Agile values and practices support this fundamental tenet.**
 - Feedback, communication, simplicity, courage & respect/humility.

Why Agile?



- Based on thousands of responses to the Industry-leading Agile survey.
- Project visibility has risen to #2.

"13th Annual State of Agile Report" by Collabnet VersionOne.

What is Scrum?

- A lightweight solution delivery framework, not prescriptive.
- “The ‘**relay race**’ approach to product development may conflict with the goals of maximum speed and flexibility. Instead a **holistic** or ‘rugby’ approach – where a team tries to go the distance as a unit, passing the ball back and forth – may better serve today’s competitive requirements.” – Ikujiro Nonaka, 1986.



- Takeuchi and Nonaka were hired to help rebuild Japan after WW II. To them, Scrum is a leadership tool for product development.

What is Scrum? – Our Divergence

1. Enable continuous flow instead of every work item being “Done” at the end of the sprint.
2. Scrum Master accountable for throughput, not just a side-line coach.
3. De-emphasize formality of ceremonies and events; actively look to remove waste and time.
4. Driven by Features, Stories, Defects; Epics never leave the backlog.
5. Discovery sessions; Sprint Planning = readiness check.
6. Size based not only effort but also on complexity and risk (unknowns).
7. Planning Poker results in one Fibonacci size, not a quick average.
8. Team makes their commitments of velocity and dates.
9. Protect autonomy, craftsmanship opportunities and purpose; happiness metrics not needed.

aspire – Our Solution Delivery Framework

become a Team

Team is accountable; the sum is greater than the parts

- Small, stable, long-lived, right-sized Teams, ideally 5 to 9 Team Members
- Bring work to Teams rather than individuals to the work
- Team Members hold each other accountable for delivery, value and quality
- Team Norms clearly define expected Team behaviors
- Named Resources per Team for continual external dependencies
- Teams are “self-organized”; they decide the “how”
- Discovery and Sizing by the Team that will do the work

gain clarity

Gaining trust and effective decision-making with proactive transparency

- All our work in one place and visible to all
- Product Owner accountable for value delivered
- Scrum Master accountable for throughput
- Simple workflow with active and wait states
- Visible, individual Owner of each work item
- Few, concise Sprint Goals to drive decisions
- Localized decision-making at the Team level

focus on value

Identify, prioritize and drive the Teams based on value

- Clear intake process, leveraging Benefits and Features
- Work items relatively prioritized by Cost of Delay and effort
- Commitments, Sprint Goals and priority drive our Teams

lean forward

Instill a focus on Lean by

- Reduce the “ceremony” and enable a pragmatic view of our framework
- Limit work in progress (WIP) to minimize context switching
- Emphasizing Minimal Viable Product (MVP) to negotiate scope
- Minimize the amount of unfinished work; maximize the work not needed
- Strongly facilitated meetings, with minimal attendees

gain alignment

Achieve significant gains in coordination, efficiency and pace by

- Frequent dialogues to align on goals, priority and dependencies
- Scrum Masters enable their Team to define commitments
- Clear acceptance criteria on work items
- Daily Stand-ups to ensure alignment while minimizing risk
- Loosely coupled Development and Release cadence

increase pace

Focus on acceleration by insisting on

- All practices stem from a desire to expedite feedback
- Small batches of work; they move significantly faster
- Work items relatively sized using Planning Poker
- Capacity-based planning, forecasting and commitments; not wish-based
- Retrospectives resulting in actionable, assigned improvements

flow continually

Control variance while reducing overhead and focusing on flow

- Pulling our work, instead of pushing it
- Definition of “Done” for each workflow state
- Time-boxing to control variance; Sprints are just snapshots in time

provide real-time visibility

Track and crush our goals while sustaining throughput and high quality

- Visible Burn-up Charts and Story Card Walls
- Traceability of Benefits, Features, Stories, Test Cases, Defects and Releases
- Continual awareness of solution quality and debt

gain momentum

Increase motivation within the Team

- Opportunities for Team to innovate and extend their craft
- High level of Team autonomy
- Tangible appreciation of high level purpose

Version 1.1

Innovation?

Focusing on the Mission, the Goal

“Can you imagine what I would do if I could do all I can?”

- Sun Tzu, The Art of War, 500 BC



<https://www.youtube.com/watch?v=3Iz7ZMALaCY>

Flow?

What Are the Goals of Our Flow of Value?

1. **Shortest sustainable lead time.**
2. **Best quality and highest value.**
3. **Most customer delight, lowest cost, high morale.**



“All we are doing is reducing the timeline by reducing the non-value added wastes.” - Taiichi Ohno, 1980

How does value flow?



<https://www.youtube.com/watch?v=Jm1VEO9C4VQ>

What Does Agile Feel Like?

1. **Less time wasted in translation** due to a common language for how solutions are developed and delivered.
2. **Non-value add activities removed** by focusing on Agile values of communication, feedback, simplicity, courage and humility.
3. More deliveries that are “on target” with **no surprises**, with an **increased confidence** in the solution’s quality and integrity.
4. **Frequent feedback** and an almost **continual ability to influence** the development stream. New items take weeks rather than months.
5. Increased **visibility, transparency** of status and metrics, and **proactive risk mitigation** and issue resolution.

There are Great Meetings and Bad Meetings

- Bad meetings drone on forever, you never seem to get to the point, and you leave **wondering why you were even present.**



- Great ones leave you **energized** and feeling that you've really **accomplished** something.
- So what makes a meeting great?

Great Meetings

**Start with
the Goal.**



Define Done.

Limit the Time.



**Don't Intentionally
Plan on
Torturing Me.**



Show the Path.



**Use Time
Wisely.**



Follow Up.



Read the Room.



Limit Attendance.



**It's a
Meeting,**



Come Prepared.

**Ban
Technology.**



Cancel the Meeting.

Key Agile Roles

Solution Context

- Priority of Portfolio
- User Expectations
- Solution Viability
- Minimum Viable Product



Stakeholder

Value Delivered

- Single Voice to the Team
- Priority of Backlogs
- Discovery Sessions
- Stakeholder Relationships
- Leadership Relationships
- Work Item Acceptance



Product Owner



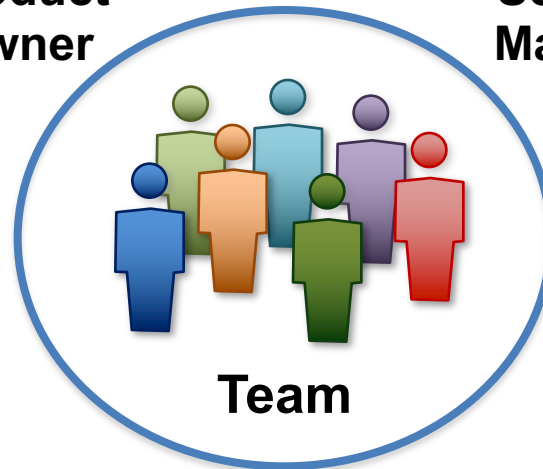
Scrum Master

Throughput

- Know the Work
- Integrity of Work Items
- Depth of Backlog
- Aspire Framework
- Protect the Team
- Status and Metrics

Be a “Team”

- Shared Accountability
- Transparency
- Self-Organized
- Work Assignments
- Deliver Reliably
- Continuously Improve



Team

Sprints – a type of Timebox

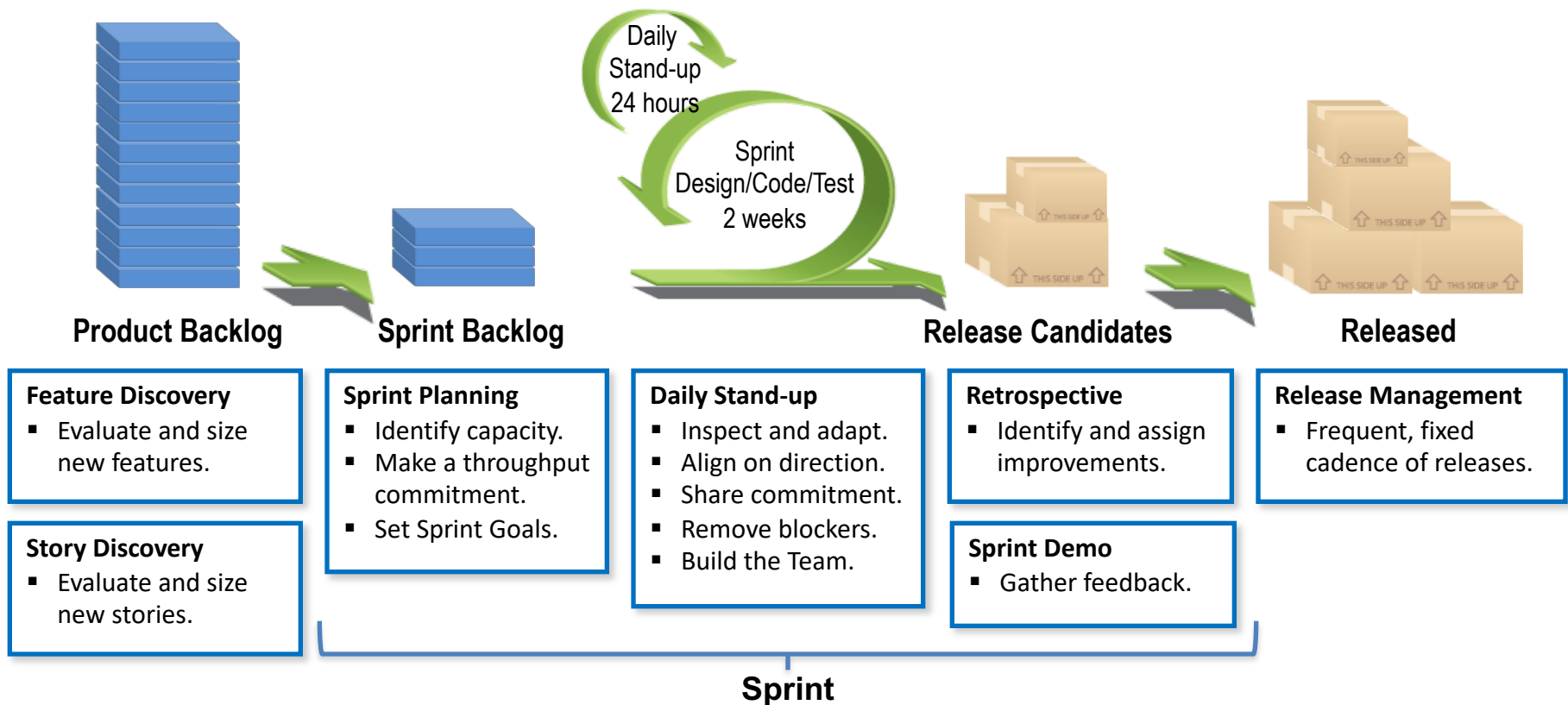
- The **heartbeat** of Scrum is a Sprint, a timebox of one month or less (typically 2 weeks) during which a “Done”, useable, and potentially releasable work items are created.



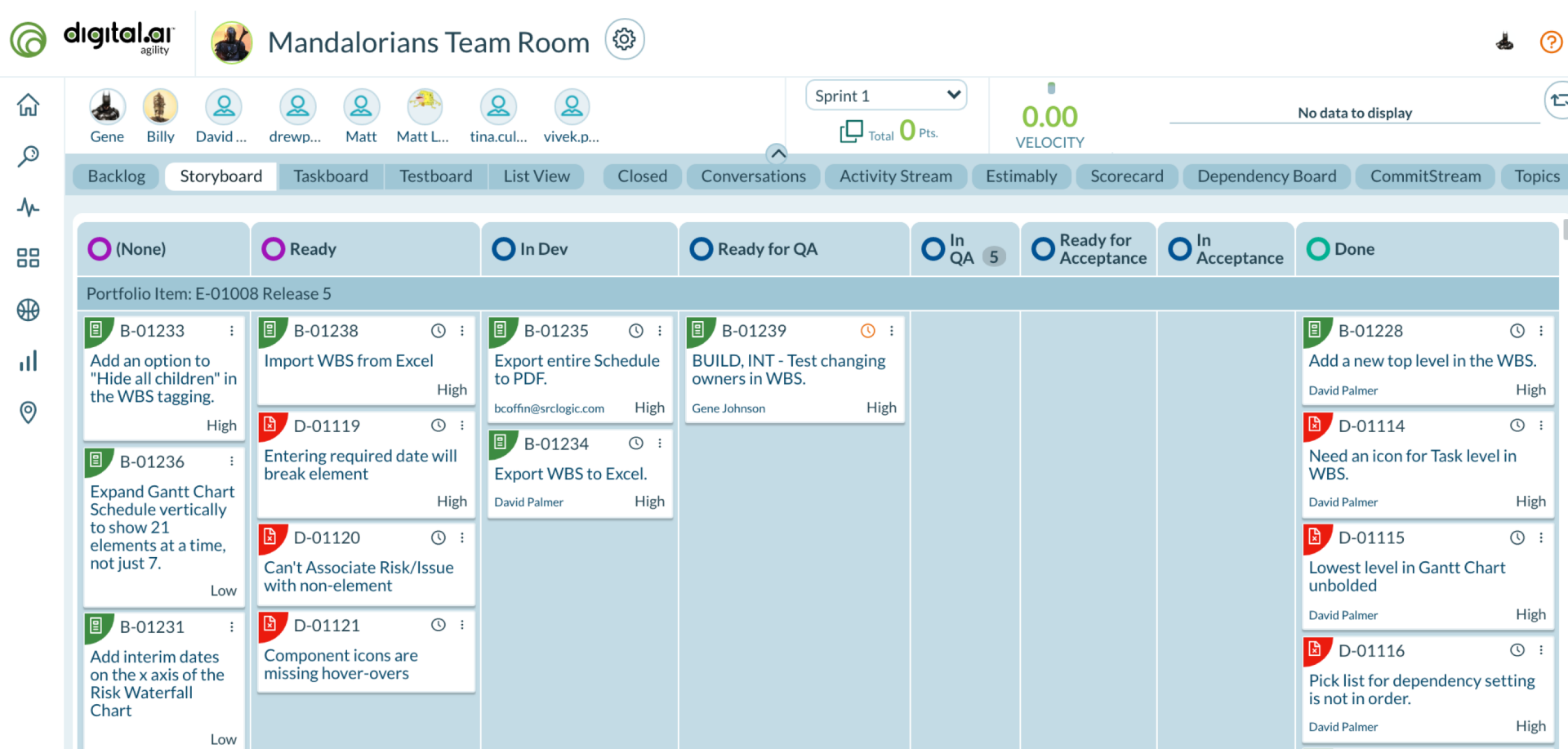
- Rather than allowing work to continue until the goal is reached and evaluating the time taken, **we stop work when the time limit is reached and inspect what was accomplished.**
- Sprints enable **predictability** while **limiting variance and risk.**

Value-driven Workflow

- **Value** represented by work items within 2-week, timeboxed Sprints.
- Feeds off a **visible, continually prioritized** Product Backlog.



Visualizing Workflow



Why Size Work Items?

- We need to evaluate the work items in our backlogs.
 - Hard to **prioritize** the items if you don't know their relative “size”.
 - Hard to **forecast** if you can't equate work items in terms of the Team's throughput.

$$\text{Size} / \text{Pace} = \text{Duration}$$

- We want insight into **how the Team is improving**.
- We **trust our Teams**. We want to have transparency and we don't want to re-interpret or pad estimates, or micro-manage.

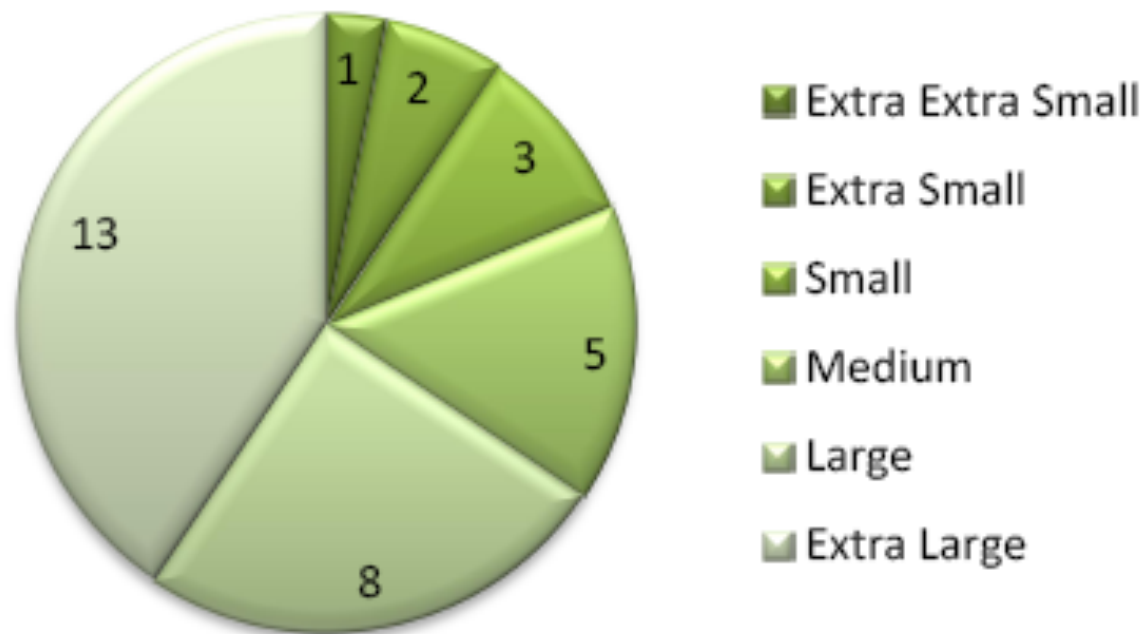
How to Size Work Items?

- We don't enjoy estimating, we know **we are not good at it**, and it has limited value.
- Using **hours leads to micro-management and hides our sense of improving.**
- Even though we are not good estimators, studies show time and time again that **we are great relative sizers.** And all we need is a **relative** measure.



How to Size Work Items?

- Each item is **sized relative to the other items in the backlog**.
- Each size represents **effort, complexity, and unknowns**.
- The size is the size to “**get the item done, tested and accepted**”.



- Fibonacci sequence provides an **additive scale**, accounts for **increased unknowns with increased size** and is fun to say.

Sizing with Planning Poker

- Delphi Method
 - A forecasting technique developed in 1960's by RAND.
- Benefits
 - Includes the **whole Team, ensuring everyone has a voice.**
 - Reveals **assumptions and uncertainties.**
 - It's **fun and quick.**
- Requires **facilitation**, typically one to three rounds per item.



Let's Size Zoo Animals

- Please assign a **relative size** to the following zoo animals.
 - Bear
 - Giraffe
 - Monkey
 - Hippo
 - Alligator
 - Penguin
- Instead of effort, complexity and unknowns, please size with a **single size, just one**, indicating the combination of the animal's relative **volume** and the **relative perceived danger if you met one late at night outside in the parking lot**.

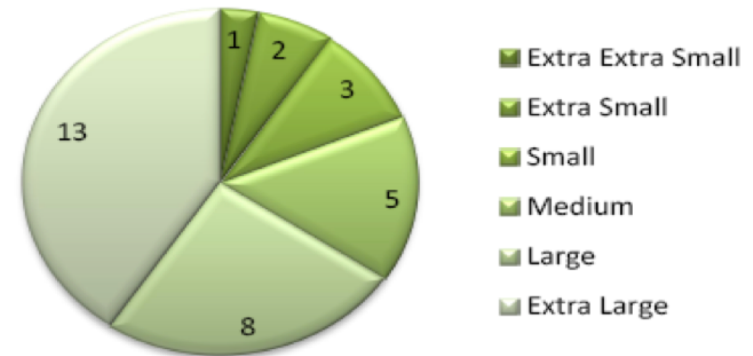
Prioritizing – Why so Hard?

- **We want it all.** If we could only get it all, we would not have to prioritize.
- **Comparing and prioritizing very unlike things** is hard.
- We have a vested, personal, **emotional interest** in some features.
- A simple “**Value/Effort**” as an ROI proxy is **flawed**. It does not account for the **temporal nature** of things.
- Rather than looking at “what can we get now”, perhaps we should look at what is the “**cost of delay**” if we don’t get it now.

Relative Priority

Features	Relative Cost of Delay (CoD)					Relative Size	Relative Priority
	Value	Time Criticality	Risk Reduction and Enablement	Alignment to Strategy	Total CoD		
Enable Find in Store	13	1	1	5	20	5	4.00
Enable Configurable Buy One Get One (BOGO)	8	1	8	2	19	8	2.38
Loyalty Club Registration thru 500Friends	2	13	13	13	41	5	8.20

Relative Scale: 1, 2, 3, 5, 8, 13 with 1 being smallest, 13 largest (additive scale)
 Relative Size accounts for Effort, Complexity and Unknowns (Risks).
 Features with Higher Relative Priority are the ones to implement first.



Value - What is the impact to the users?

Time Criticality - How does the business or user value decay over time? Is there a fixed deadline?

Will they wait for us or move to another solution? Are there milestones on a critical path impacted by this?

Risk Reduction and Enablement - Does it reduce the risk profile of the initiative or a future delivery?

Will this delivery open up the opportunity for other Initiatives or Features?

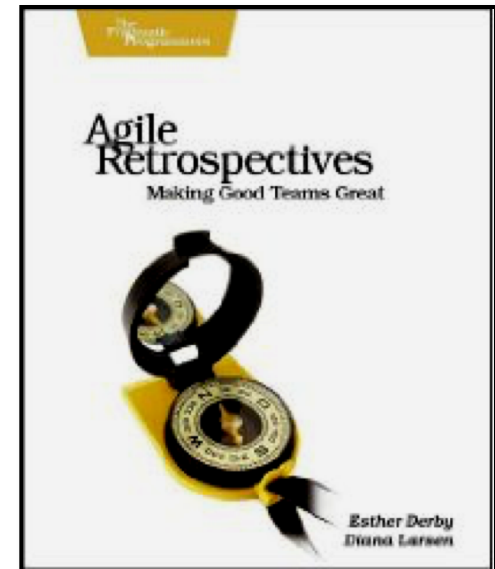
Alignment to Strategy - Does it align with our strategic themes or mission goals?

Daily Stand-up

- They are **an inspect and adapt moment**, allowing **mid-course corrections** to be made sooner rather than later.
 - Daily stand-ups **reduce the need for having full blown meetings**.
 - They encourage **self-organization** of the Team.
 - They encourage **accountability** because Team members know who is working on what and how long it is taking.
 - They encourage the team to **solve problems on their own** and to be **courageous** in their communication of issues, concerns and roadblocks. Managers hear about roadblocks early on and can intervene with resolutions or mitigation plans.
-
- **Emphasizes all the Agile Values:** Communication, Simplicity, Feedback, Courage, Humility and Respect.
 - Provide an opportunity to introduce **FUN** into the Team environment.
 - If it is a “**low energy**” meeting, then something is **broken**.

Retrospective

- At Sprint close, at project end, anytime, any topic or theme.
 - Retrospectives **notoriously** miss their mark, forgetting that it is **an inspect and adapt moment**.
 - The **goal is to identify an improvement and get it assigned**.
-
- Five Stages
 - Set the Stage
 - Gather Data
 - Generate Insights
 - Decide What to Do
 - Close
 - Capture results as “Improvement Stories”



Teams?

Why Teams?

1. Working in teams increases **collaboration** and allows **brainstorming**. As a result, **more ideas** are developed and **productivity improves**.
2. Two or more people are always **better than one** for solving problems, finishing off difficult tasks and increasing creativity.
3. Everyone is unique and has different skills, backgrounds and experiences. Therefore, others in a team can **help you see things** from a different angle.
4. Teamwork encourages communication between team members. For this reason, **relations between employees tend to be better and over time** employees learn to communicate better.
5. Enable **self-organizing teams** where they themselves choose how best to accomplish their work, being held jointly accountable for their success, rather than being directed by others.

Recognizing a “Great” Team?



<https://www.youtube.com/watch?v=BFNCpzGnTTs>

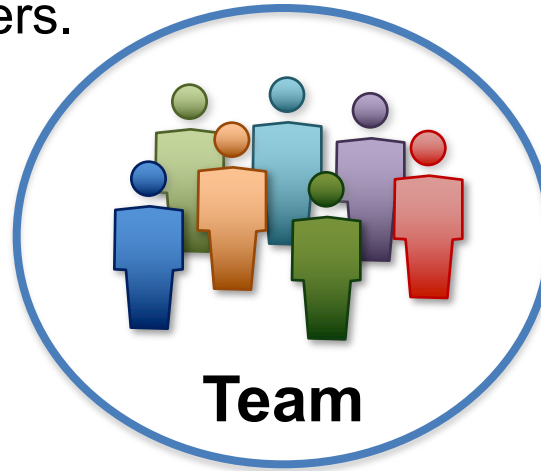
Recognizing a “Great” Team?

You can tell if a group is a Team within 10 seconds...

1. There is a clear **unity of purpose**.
2. The group is **self-conscious** about its own operations.
3. The group has set **clear and demanding performance goals**.
4. The atmosphere tends to be **informal, comfortable, relaxed**.
5. There is a lot of **dialogue** in which virtually everyone participates.
6. People are free in expressing their **feelings** as well as their **ideas**.
7. There is **disagreement** and this is viewed as good.
8. Most decisions are made where there is **general agreement**.
9. Each individual **carries his or her own weight**.
10. **Criticism** is frequent, frank and relatively comfortable.
11. The leadership of the team **shifts** from time to time.

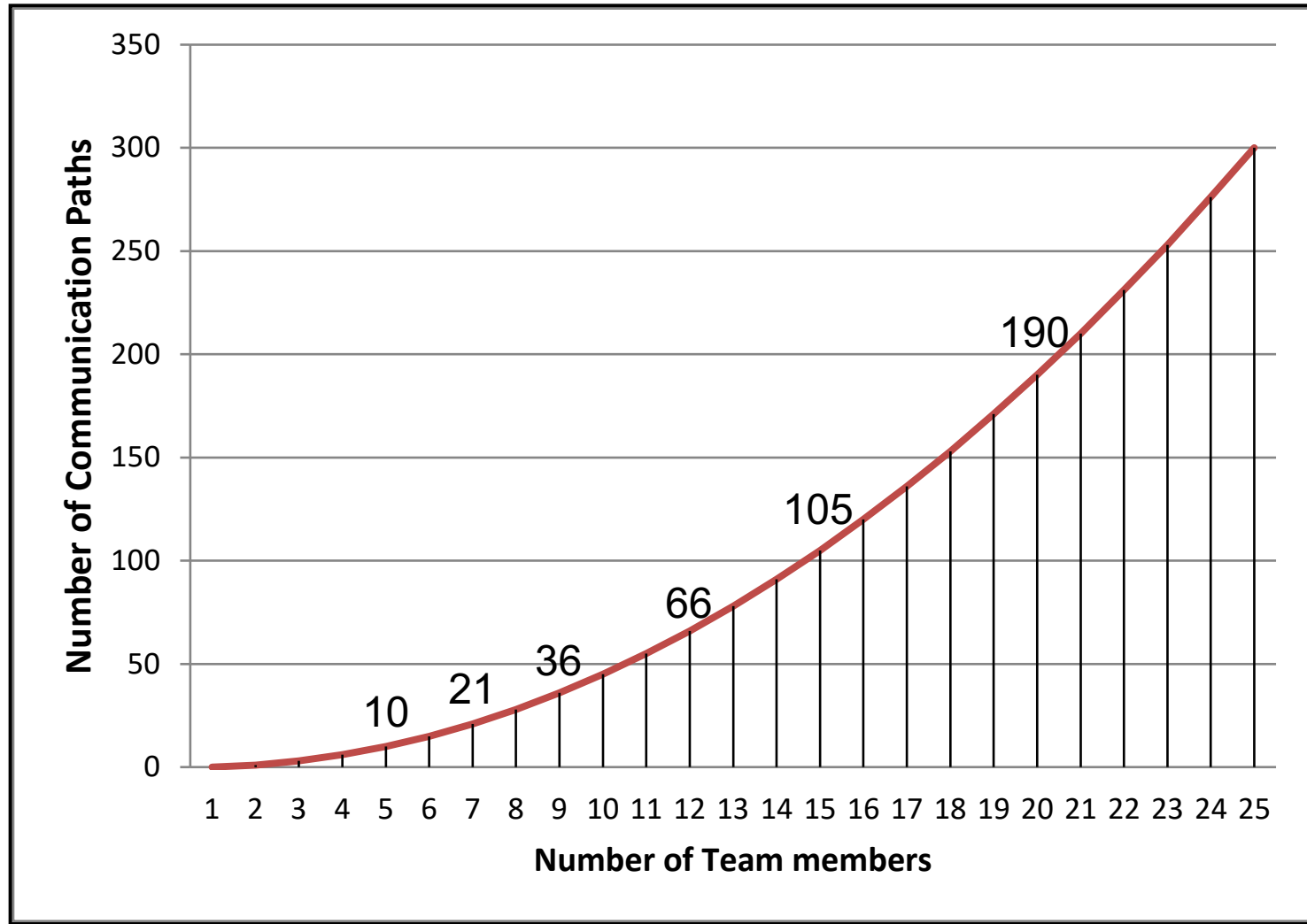
Team Size?

- Team size is small enough to remain nimble and large enough to complete significant work within a Sprint. The best range is **five to nine** Team Members.



- Fewer than three Team members decrease interaction and results in smaller productivity gains.
- Having more than nine Team members requires too much coordination. Large Teams generate too much complexity for an empirical process to manage.

Team Size?

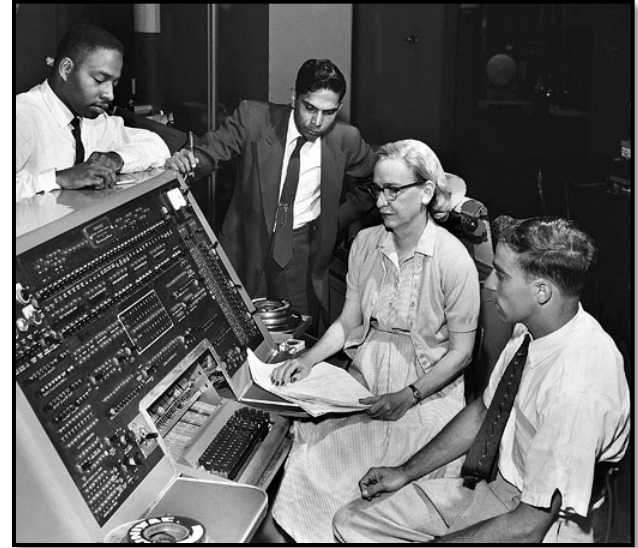


Leadership?

Recognizing Leadership in a Time of Change

“You manage things, you lead people.
We went overboard on management and forgot about leadership.”

- Rear Admiral “Amazing” Grace
Murray Hopper



Grace Murray Hopper at the UNIVAC keyboard, c. 1960

- Successfully enabling change and sustaining it requires leadership.
- Leaders **exhibit the urgency** for change, **communicate the need** for change, **build a plan** for a successful change, **understand** and **lead the change** process, and **address problems** as they come up.
- We need to **instill leadership traits in every role.**

Aligned with Motivation

- When a task gets more complicated, it requires some conceptual, creative thinking, once you take money off the table...



- Agile is aligned with this!

<https://www.youtube.com/watch?v=u6XAPnuFjJc&feature=youtu.be>

Principle of Mission

“Specify the end state, its purpose, and the minimal possible constraints.” - Don Reinertsen, “Principles of Product Development Flow”, 2009

“Self-organized teams are not, as some perceive, leaderless teams. Any group left to its own devices will self-organize in some fashion, but to be effective in delivering results, it needs to be steered in the right direction. Self-organizing Teams **aren’t characterized by a lack of leadership, but by a style of leadership.**” - Jim Highsmith, “Agile Project Management: Creating Innovative Products”, 2009.

Servant Leadership

“If you want to build a ship, don’t herd people to collect wood and don’t assign them tasks and work, but rather teach them to long for the endless immensity of the sea.” - Antoine de Saint-Exupery,

- Rather than direct, control and take responsibility for teams, leaders **coach, inspire, and lead** them.
- Enable the team to **solve its own problems** requiring a **tolerance for imperfection**.
- Rather than measure and manage, ask questions and offer a **perspective** while making **room for failure** and learning.
- **Remove barriers** that get in the team’s way, smoothing their path.
- **Convince** rather than coerce.
- **Champion** and **cheer** the team through their challenges.

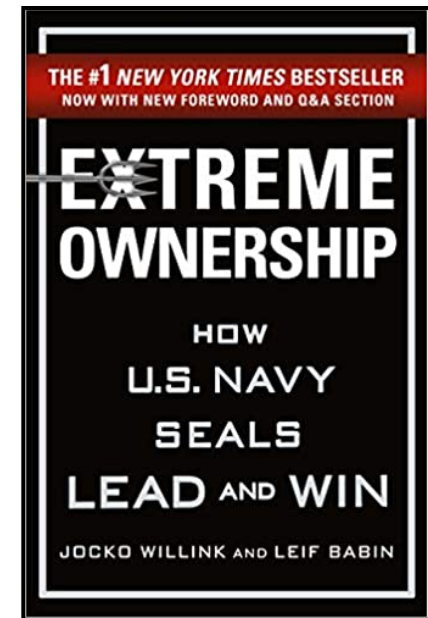
“A leader is best when people barely know he exists, when his work is done, his aim fulfilled, they will say: we did it ourselves.” - Lao Tzu.

“The Art of War”, published 2,500 years ago.

- A leader **leads by example**, not by force.
- He will win whose army is **animated by the same spirit** throughout all its ranks.
- Strategy without tactics is the slowest route to victory. Tactics without strategy with the noise before defeat.
- **Opportunities multiply** as they are seized.
- Treat your troops as you would your own beloved children and they will follow you into the deepest valley.

Extreme Ownership

Two U.S. Navy SEAL officers who led the most highly decorated special operations unit of the Iraq War demonstrate how to apply powerful leadership principles from the battlefield to business and life.



Lesson 1 – Adopt a Leadership Mindset

Leadership is the single greatest factor in any Team's performance. All responsibility for success or failure of the Team **rests with the leader**.

The leader **does not take credit** for success but instead, bestows that honor on the Team.

- No bad teams only bad leaders.
- The leader drives performance or doesn't.
- It's not what you preach, it's what you tolerate (use team norms).

When a resource is struggling,

- Do they have training, resources and understanding of the mission?
- If a resource is still struggling, then the **leader must be loyal to the team and mission, above the individual**.

Lesson 2 – Understand the Laws of Combat

1. Cover and Move.

- Clear objective, trust, accountability, teamwork.

2. Simplify.

3. Prioritize and Execute.

- Relax, look around, make a call.
- Get good at making decisions based on the information at hand.

4. Decentralized Command.

- Teams within teams, each with a clear empowered leader.
- Decentralize when decisions are local and time critical.
- The inefficiency of decentralization costs less than the value of faster response time and motivates the local teams by increasing their autonomy.
- Shift from what am I gonna do, to this is what I am doing since I know the context firsthand.

Do's and Don'ts For Leadership Roles

Do this!

- Own responsibility for success or failure of the Team.
- Be available.
- Be timely.
- Communicate instantly and clearly, inline with your Accountability.
- Look for signs of throughput and value.
- Insist on a focus and minimal context-switching.
- Allow learning from failure, boldness.
- Use the Product Owner as the way to influence what the Team is doing.
- Influence based on trends of data.
- Insist on transparency.
- Let the Team own their accountability.
- Get your insight through Gemba (go to the place where value is being created).
- Be aware of dynamic complexity, the temporal nature of actions and results.
- Practice “principle of mission”.
- Be a Servant Leader, an inspiration.

Don't do this!

- Seek to blame the Team or others for the Team's failures.
- Be unavailable or “missing” when called.
- Be a delay, a blocker.
- Surprise due to a lack of communication, or cross into another role's Accountability.
- Look for signs of resource utilization.
- Overload team members with high work in progress and multi-tasking.
- Punish failure and instill fear.
- Provide “special”, additional assignments to the Team.
- Overly respond to normal variance.
- Respond to third-hand perceptions.
- Be the hero for the Team.
- Trust insights gained from far, far away from the Team or from PowerPoints.
- Assume cause and effect is close in time or location.
- Strip away the Team's autonomy.
- Control, coerce or insincerely reward.

Next Steps?

Next Steps

- Leverage Scrum roles.
- Improve “intake” of work.
 - Value of Features, tied to mission.
 - Relative prioritization.
 - Reasonable pivoting without extreme context switching.
 - Enable pulling of work.
- Leverage workflow.
 - Sprints and cadence.
 - Stories and breaking work down by value.
 - Relative sizing.
 - Stand-ups.
 - Retrospectives.
- Teams...

