Pivoting to Agile: What You Won’t Read in a Book

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- Certified Scaled Agile Framework (SAFe®) Consultant

Focus:
- Customizing Agile and Lean for Individuals/Teams/Companies/Enterprises
- Since 2001, 100+ Agile transformations including Fortune 500, Government, and Startups
- Author, Becoming Agile in an Imperfect World

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Agile is on Fire

86% of software development teams are using Agile (up from 37% in 2020)

But Companies are Encountering Barriers

- 43% reported cultural clashes
- 42% noted general organizational resistance to change
- 41% recorded an absence of leadership participation
- 40% had inadequate management support and sponsorship
How Can You Get Value Without Pain?

Three Ways to Remove the Pain

1. Stop Cheating
2. Customize to your Environment
3. Motivate the People
Suggestion 1: Stop Cheating

Foundation
- Assess Culture
- Assess Structure
- Assess Practices
- Design Team
- Establish Core Team
- Management-Training
- Communication Plan
- Create Roadmap

Early Rollout
- Spread Lean Principles
- Expose All Work
- Improve Scrum/XP
- Early Value Streams
- Train Betas/Pilots
- Coach Betas
- Develop Product Owners
- Develop Internal SMEs
- Review Betas/Pilots
- Update Roadmap

Enterprise Agile
- All Teams on Same Cadence
- Enterprise-wide Value Streams
- Agile Portfolio Management
- Focus on Technical Excellence
- Develop Internal Training
- All Teams using Scrum or Kanban
- Address Technical Debt

Typical Foundation Activities

<table>
<thead>
<tr>
<th>Priority</th>
<th>Work Item</th>
<th>Description</th>
<th>Owner</th>
<th>Target Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>C</td>
<td>Define Success</td>
<td>How will we be able to tell if Agile made things better? Are there existing KPIs/Success Factors measured today?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C</td>
<td>Establish Agile Core Team</td>
<td>Group of 5 to 7 responsible for helping MSS move to Agile Culture and Practices. Meet frequently to sustain Agile.</td>
<td></td>
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</tr>
<tr>
<td>C</td>
<td>Assess Existing Projects and Practices</td>
<td>Review practices being used for fit and value. Understand how existing structures support projects and maintenance.</td>
<td></td>
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</tr>
<tr>
<td>C</td>
<td>Assess maturity of teams (personal and technical).</td>
<td>Can team members self-direct? Are they seasoned software professionals?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C</td>
<td>Design First Pass at Agile Framework</td>
<td>Which practices to use across MSS. A master list; each project team will use a subset. Include project management and software development practices.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C</td>
<td>Create risk management plan</td>
<td>Classic waterfall risk management brainstorming session on risks to rolling out Agile/Lean.</td>
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</tr>
<tr>
<td>C</td>
<td>Formally identify Agile Executive Sponsor</td>
<td>Sponsor champions and communicates Agile to MSS at large and explains why it is important. Also works to remove impediments for Agile teams (support teams, other State teams, vendors, etc.).</td>
<td></td>
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</tr>
<tr>
<td>H</td>
<td>Agile Fundamentals for Managers and Executives</td>
<td>Estimate 1 day of training. Will help the managers shape the framework and support the teams. Will also initialize a common understanding of what Agile means at MSS.</td>
<td></td>
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</tr>
<tr>
<td>H</td>
<td>Create Cheat Sheets for Roles and Teams</td>
<td>Nice to have aids that support key points from training.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>Create awareness with business and vendor partners</td>
<td>We will need some level of support or delegation from the folks we are building solutions for.</td>
<td></td>
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</tr>
<tr>
<td>H</td>
<td>Create communication plan</td>
<td>Time to keep folks informed of the department. Awareness: Buy-in, Ownership.</td>
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</tbody>
</table>
Example Foundation Activity - *Define the Vision*

For Our Stakeholders and Employees

Who want to continuously increase revenue and market share

The Agile 2022 program

Is a move to becoming an empowered organization

That beats competitors to new markets and opportunities by fostering an iterative and incremental approach to learning and delivering

Unlike our existing silo approach, we will be structured around delivering value to our customers, as opposed to optimizing each functional area - which will reduce cycle time and lower costs

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**Typical Piloting Activities**

<table>
<thead>
<tr>
<th>PIOTING AND VALIDATION</th>
<th>Validate our assumptions about using Agile at MSS. Refine the roadmap and framework based on discoveries.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority</td>
<td>Work Item</td>
</tr>
<tr>
<td><strong>C</strong></td>
<td>Identify pilot teams</td>
</tr>
<tr>
<td><strong>C</strong></td>
<td>One on one coaching/training with Scrum Masters and Product Owners</td>
</tr>
<tr>
<td><strong>H</strong></td>
<td>Train pilot teams on Agile and their frameworks</td>
</tr>
<tr>
<td><strong>C</strong></td>
<td>Coach and support pilot teams</td>
</tr>
<tr>
<td><strong>C</strong></td>
<td>Review pilots</td>
</tr>
<tr>
<td><strong>C</strong></td>
<td>Update Framework</td>
</tr>
<tr>
<td><strong>C</strong></td>
<td>Update Roadmap</td>
</tr>
<tr>
<td><strong>H</strong></td>
<td>Identify Agile practices that can be used for any project.</td>
</tr>
<tr>
<td><strong>H</strong></td>
<td>Identify workstreams where Kanban is a better fit</td>
</tr>
</tbody>
</table>
Then You Are Ready to Scale

**SCALING AND SUSTAINING**

Pursue the highest level of Agility that MSS can support. Use the Agile/Lean mentality at all levels.

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<tr>
<td>C</td>
<td>Make all work transparent</td>
<td>We can only manage what we can see.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>Train Business Partners</td>
<td>If they are ready we should, even if just a subset. Training will be only what they need to know.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C</td>
<td>Review Intake Process</td>
<td>Can be part of the portfolio work. See if the intake process can be improved.</td>
<td></td>
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</tr>
<tr>
<td>C</td>
<td>Agile/Lean Portfolio Management for Product Steering Committee</td>
<td>Establish project workflow that maps to team capacity. Pull projects into team versus push. Prioritize projects. Expose all projects.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C</td>
<td>Address dedicated teams vs. maintenance needs</td>
<td>This will get started during piloting. For teams sprinting, dedication is desired for optimal results. Investigate what we can do to better support dedication and throughput.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>Better Environment and Structure Support</td>
<td>Team rooms? Dedicated teams? Product, business area, or other</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>Create internal training system.</td>
<td>Can supplement in person training when new hires or contractors come in. Greg can help the training team if there is one.</td>
<td></td>
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</tr>
<tr>
<td>H</td>
<td>Establish Agile Specific Practice SMEs</td>
<td>Internal gurus to coach other. Experts in story writing, story point estimation, TDD, etc.</td>
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</table>

Suggestion 2: Tailor and Customize
### Quick Review of the Main Sprint Goal

A sprint is a time-boxed event that delivers a subset of production-ready software.
90% Plus Success Rate

Week 1
- Sprint Planning
  - P.O. reviews stories with team
  - Stories researched
  - High level designs
  - Stories tasked
  - Team commits
- Start Sprint

Week 2
- Build
  - Test
  - Accept
- CONSTRUCTION
  - Sourcing/Data Analysis
  - Modeling
  - Mapping/ETL/Work
  - Visualization
  - Testing
  - Acceptance

Week 3
- Build
  - Test
  - Accept
- MID – SPRINT DEMO
  - If some stories are ready
  - Teams continues with Modeling/Mapping/ETL/Work/Visualization/Testing/Acceptance

Week 4
- Finalize
  - Demo
  - Learn
- CONSTRUCTION
  - Sourcing/Data Analysis
  - Modeling
  - Mapping/ETL/Work
  - Visualization

STABLIZE
- No new stories to testing
- Finalize stories in flight
- Standups still occur

Team Grooming Meeting [1-2hr]
- Teams continues with Modeling/Mapping/ETL/Work/Visualization/Testing/Acceptance

Next Sprint Grooming/Prep/Early Modeling

Week 5
- Sprint Wrap-Up
  - (2 to 4 hours)
  - Demo/Retrospective
  - Review velocity
  - Potluck

Flex Day
- Clean up current sprint
- Prep for next sprint
- Some team members off
Suggestion 3: Motivate

What If You Could Save 100,000 Lives?
Case Study

Donald Berwick, CEO Institute for Healthcare Improvement (IHI)

- Data showed 10% defect rate in healthcare
  - Equates to 15 million instances of medical harm each year
  - Equates to thousands of needless deaths each year
- Cars can be built at a defect rate of .1%
  - Why can’t we be that low?

The Plan

- December 14, 2004 - Berwick gave speech at hospital admin convention
- Proposed six specific interventions to save lives

**GOAL**: Save 100,000 lives in the next 18 months.
Easy Sell?

No, it was an uphill battle. All admins were supportive but reluctant.

Why?

• They had to admit to errors
• They had to change behaviors that were ingrained and automatic
• The death numbers were just that, numbers and statistics

New Strategy: Make it Real and Personal

Sorrel said, “I’m a little speechless, and I’m a little sad, because I know that if this campaign had been in place four or five years ago, that Josie would be fine... but, I’m happy. I’m thrilled to be a part of this, because I know you can do it, because you have to.”
18 Months Later... Results!

• **122,300 saved lives**
• Thousands of hospitals were convinced to change

<table>
<thead>
<tr>
<th>Practice</th>
<th>No. of Participating Hospitals</th>
<th>Other Major Organizations Promoting/Mandating Practice</th>
<th>Strength of Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rapid Response Teams</td>
<td>1,781</td>
<td>None</td>
<td>Relatively Weak</td>
</tr>
<tr>
<td>Medication Reconciliation</td>
<td>2,185</td>
<td>JCAHO</td>
<td>Weak–Medium</td>
</tr>
<tr>
<td>Prevent Central Line Infections</td>
<td>1,925</td>
<td>JCAHO</td>
<td>Strong</td>
</tr>
<tr>
<td>Prevent Surgical Site Infections</td>
<td>2,133</td>
<td>JCAHO, CMS</td>
<td>Strong</td>
</tr>
<tr>
<td>Prevent Ventilator-Associated Pneumonia</td>
<td>1,982</td>
<td>JCAHO, CMS</td>
<td>Strong</td>
</tr>
<tr>
<td>Evidence-Based Care for Myocardial Infarction</td>
<td>2,288</td>
<td>JCAHO, CMS, NQF</td>
<td>Strong</td>
</tr>
</tbody>
</table>

How does this apply to driving an Agile Transformation?
1. A Goal Should Be Specific

Berwick and the team wanted to save specifically 100,000 lives. They got into the weeds and defined it even more clearly, with 6 specific areas to address.

Example

- Prevent ventilator associated pneumonia
  - Detailed Adjustment: Keep the patient’s head angled between 30 and 45 degrees

A Transformation Goal Should Be Specific

A recent client wanted everything:

- Iterative delivery
- Leave waterfall mentality
- Improve ability to adapt
- Increase customer satisfaction
- Deliver quicker
- Lower costs
- Reduce number of defects

Could Your Company Swallow all of these Goals?
Focus on One Main Goal

We moved to one simple goal: **REDUCE CYCLE TIME**

Our Guiding Principles:

- Only create artifacts for a known customer (team, end user, governance)
- Ensure that a process change reduces the overall cycle time, not just in a functional area
- Maintain the optimum Work In Progress levels for each queue
- Increase skills across team members to lower resource dependency

2. Motivate the Group

Berwick connected with emotion by bringing in the mother of a real victim

How many admins thought of their own families?
Make it Personal for Agile Team Members

• Be honest about constraints and limitations
• Correlate Agile to a resume bullet and career development
• Involve team members in the design - let them own it

3. Shape the Path (Make it Easier)

• Only one page to enroll
• Detailed instructions and training
• Used peer pressure by showing successful hospital results
• Established mentoring groups with practice gurus
Make it Easy for Agile Teams

• Find or create experts/mentors
• Share successes
• Provide detailed training and coaching
• Create an Agile-conducive environment
  • Status walls/online tools
  • Team rooms
• Support throughout the company

Questions?

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