Teaching an Elephant to Dance

Patterns and Practices for Scaling Agility

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Agenda

- **Why is it hard?**
- Agile at Scale
- A Model of Agile Transformation

Agenda

- Why is it hard?
- **Agile at Scale**
- A Model of Agile Transformation

Agenda

- Why is it hard?
- Agile at Scale
- **A Model of Agile Transformation**

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Why is it hard?

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Agile is optimized for small teams

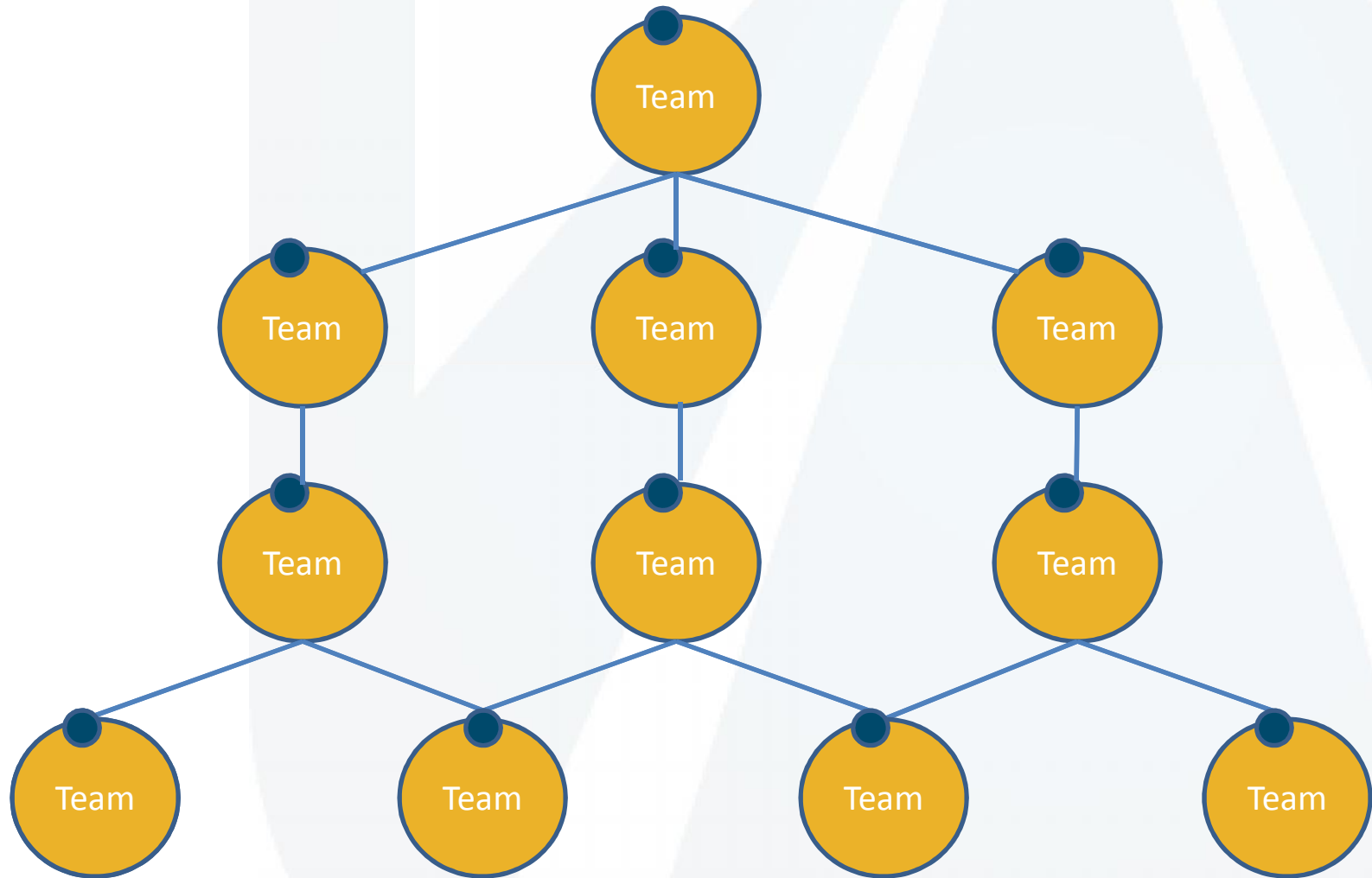# User Stories are too small in an Enterprise Context

Multiple teams introduce dependencies and coordination challenges

It's hard when…

We show what it looks like

But Not

How organizations will get there safely

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Safety

- Successfully do your job
- Feed your family / Kids in college
- Viable over time

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You have to align various perspectives

Executive

Management

Performer

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Safety is different depending on your perspective

Executive

Management

Performer

- Supported
- Possible
- Demonstrate success

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Safety is different depending on your perspective

Executive

Management

- Role clarity
- Success is measurable
- Maintain organizational influence

Performer

- Supported
- Possible
- Demonstrate success

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Safety is different depending on your perspective

Executive

- Operational model aligned with the strategy
- Credible plan
- Demonstrate progress

Management

- Role clarity
- Success is measurable
- Maintain organizational influence

Performer

- Supported
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Agile at Scale

Different Teams for Different Jobs

Team

Services Teams – These teams support common services across product lines. These teams support the needs of the product teams.

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Team

Team

Product Teams – These teams integrate services and write customer facing features. This is the proto-typical Scrum team.

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Team

Programs Teams – These teams define requirements, set technical direction, and provide context and coordination.

Team

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Team

Services Teams – These teams support common services across product lines. These teams support the needs of the product teams.

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Team

Portfolio Teams – These teams govern the portfolio and make sure that work is moving through the system.

Team

Programs Teams – These teams define requirements, set technical direction, and provide context and coordination.

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Product &
Services
Teams

Team

Team

Team

Team

Team

Team

Team

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Product & Services Teams

Scrum

Team Team Team
Team Team Team Team

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Program
Teams

Product &
Services
Teams

Scrum

Team
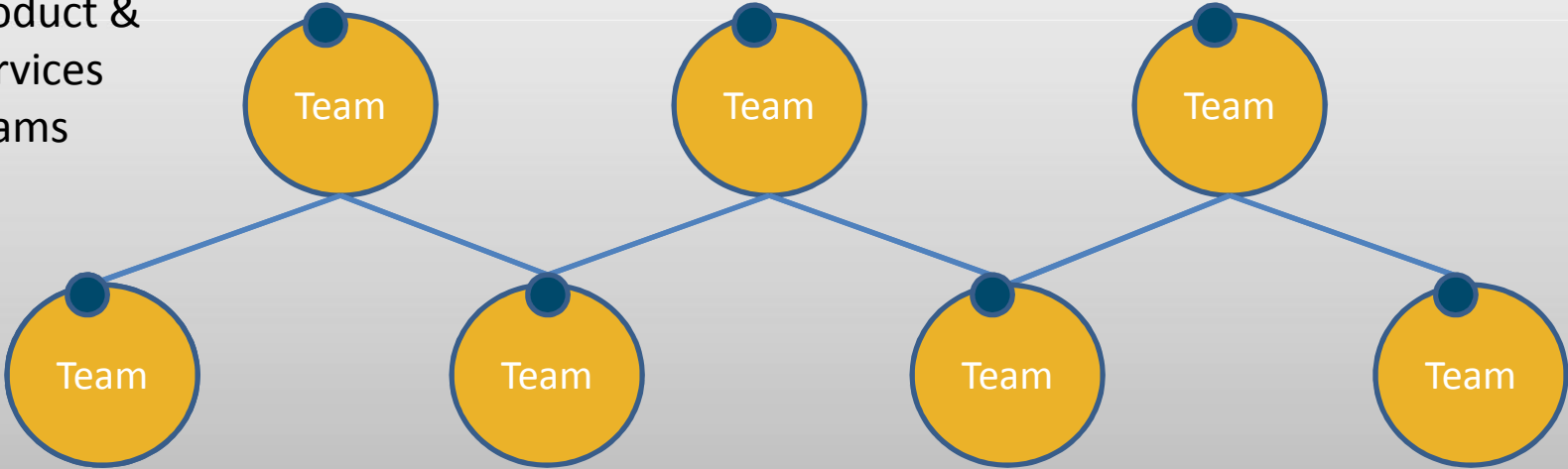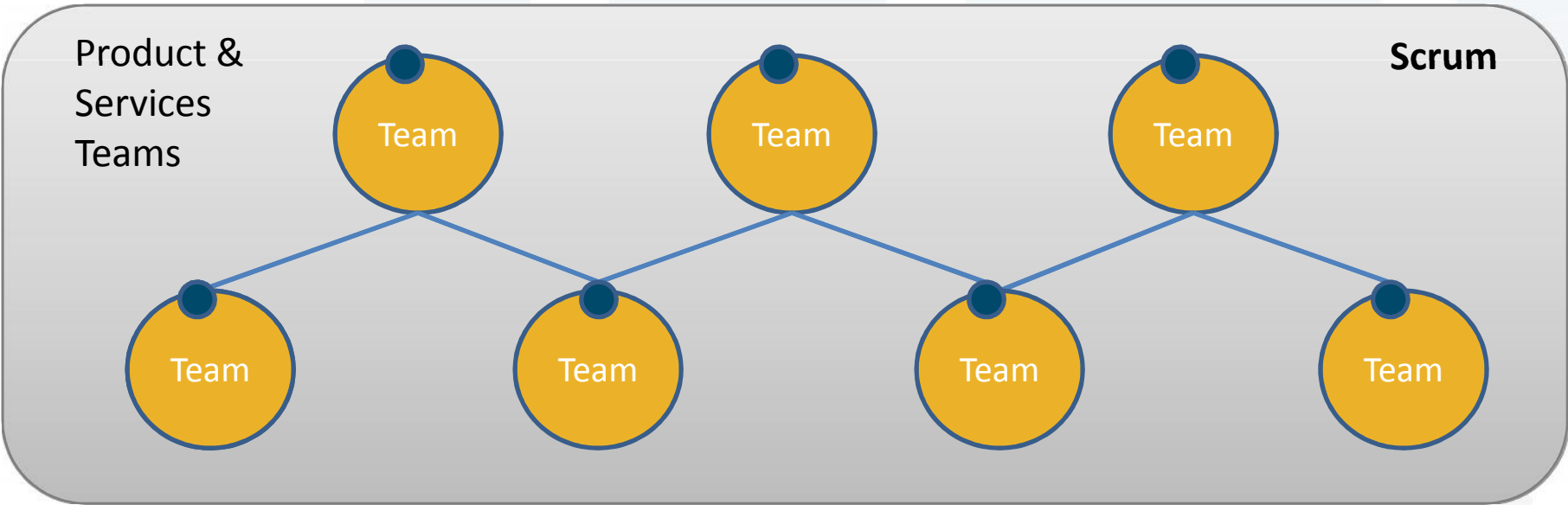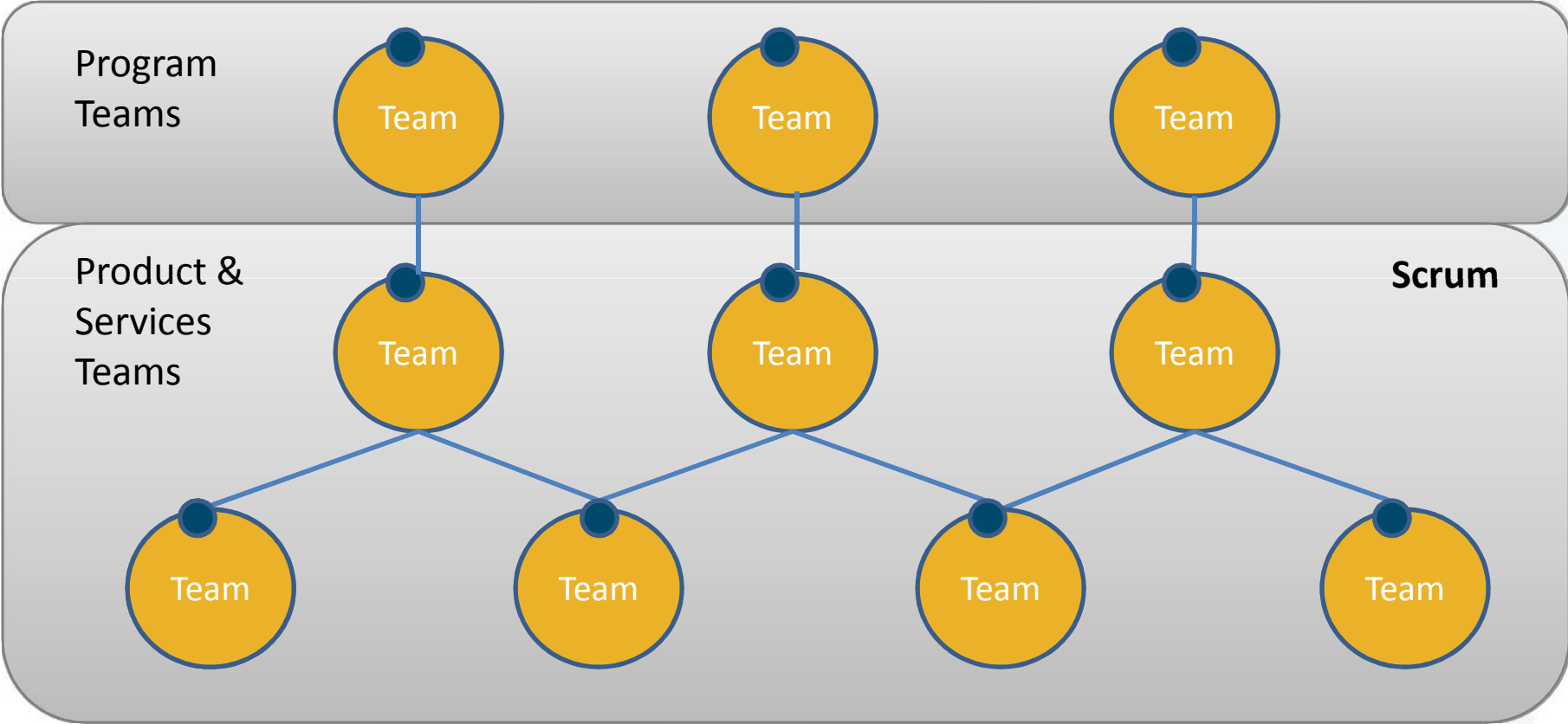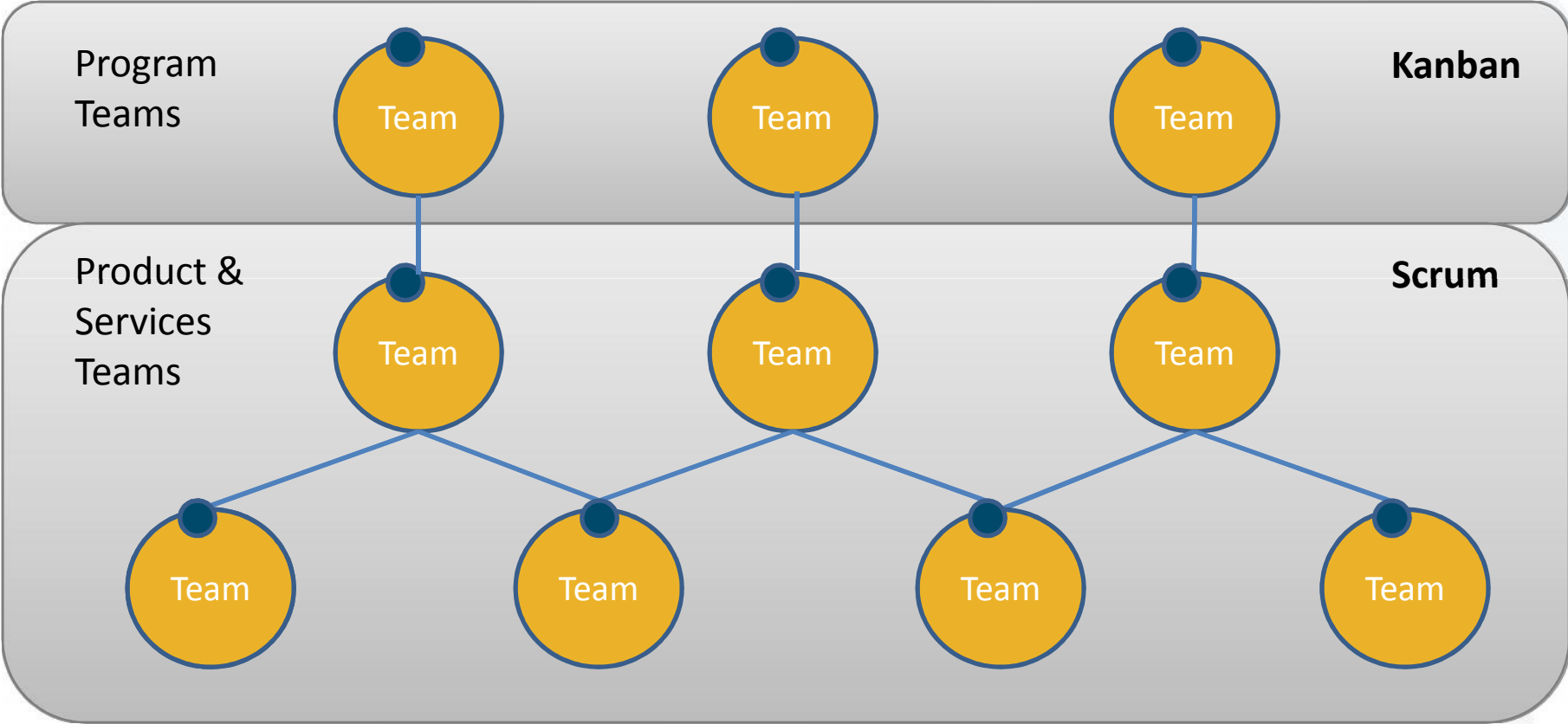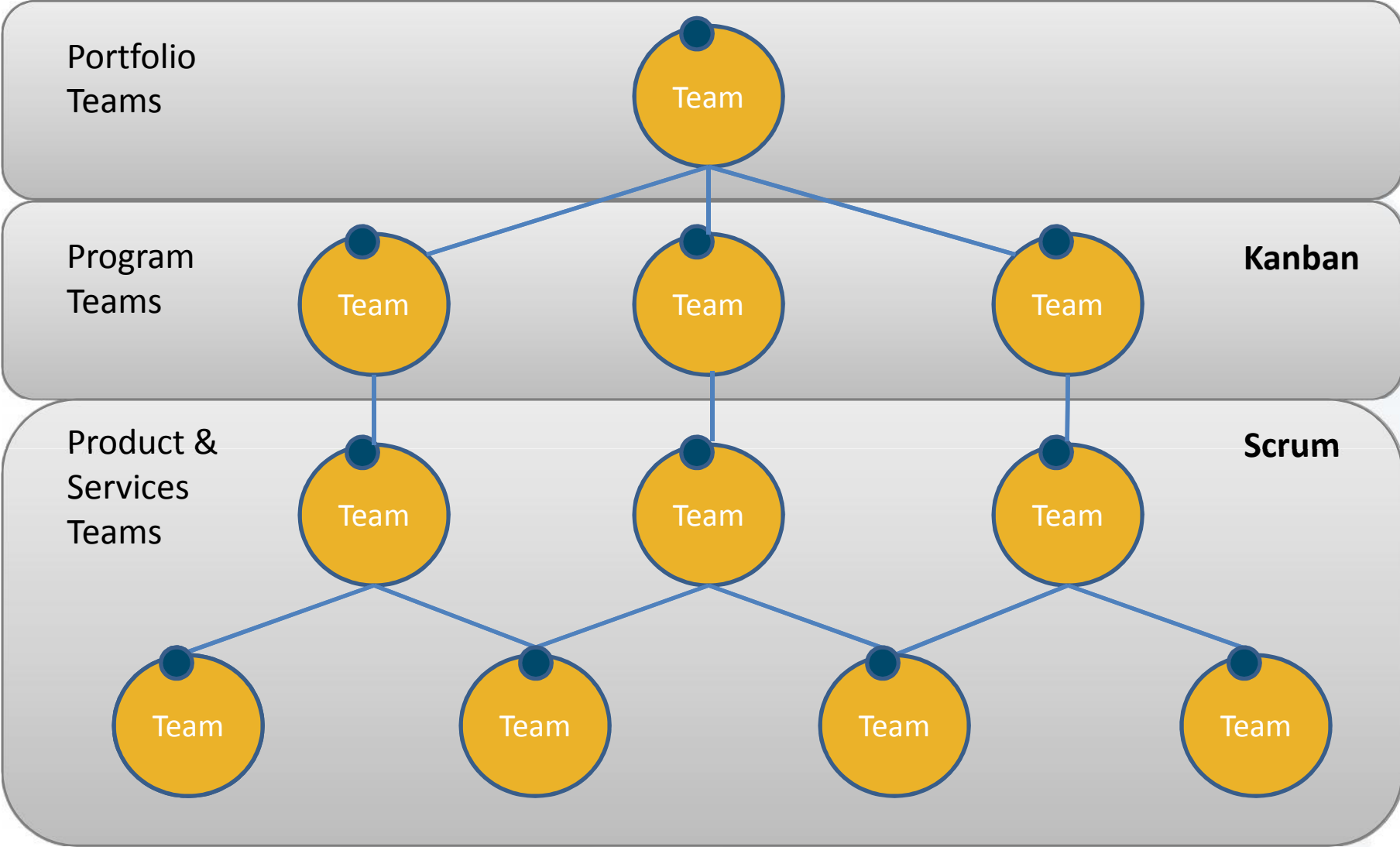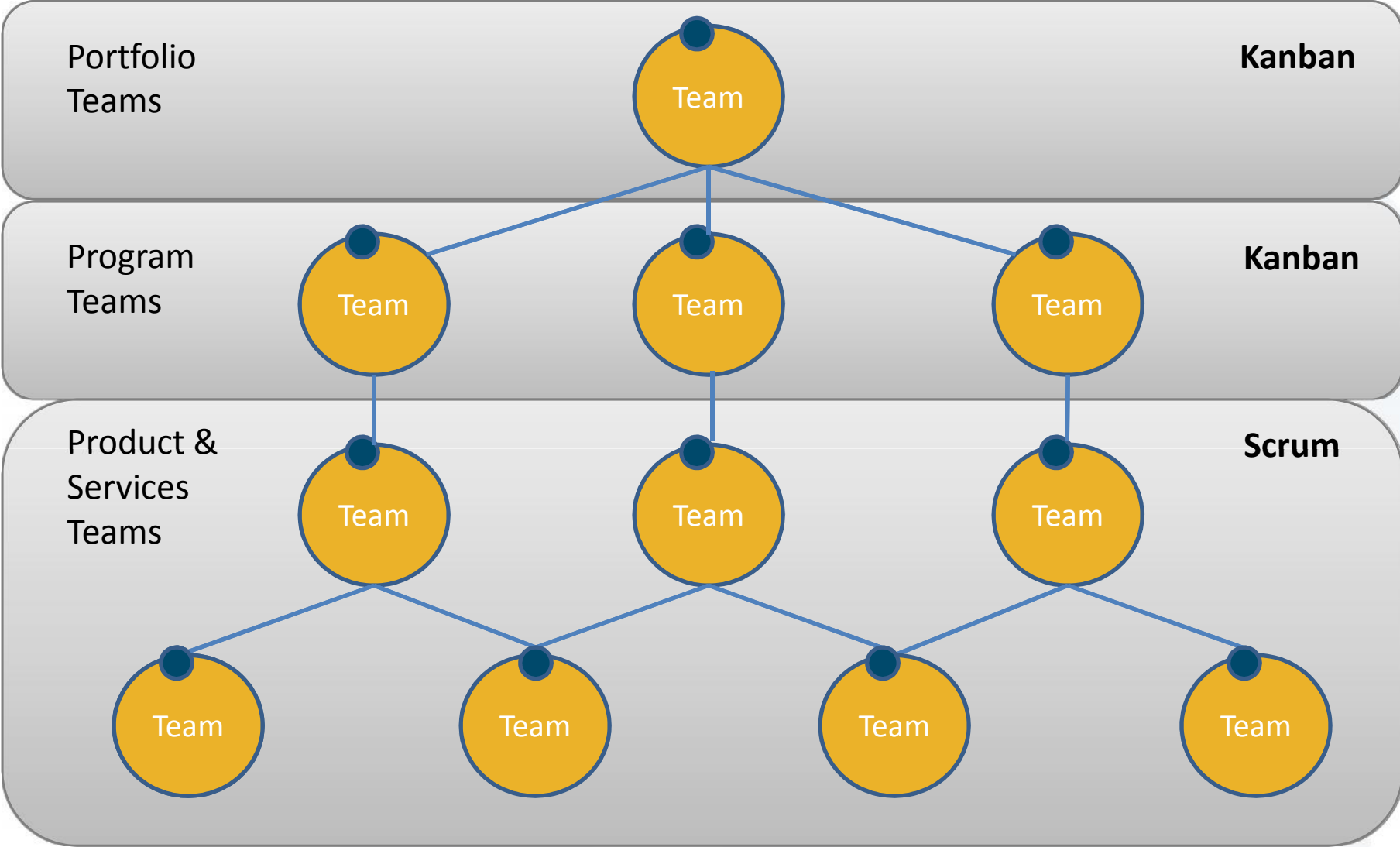
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Agile Governance

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Development Flow

EPICS | New Concept | Market Research | Feasibility Study | Release Targeting | Detailed Planning | Ready To Build | Develop and Test | Done | KANBAN

FEATURE | Feature Breakdown | Story Mapping | Story Review | Develop and Test | Integration Testing | Feature Complete | KANBAN

STORY | Story Backlog | Task Ready | Task In Process | Task Done | Story Done | SCRUM
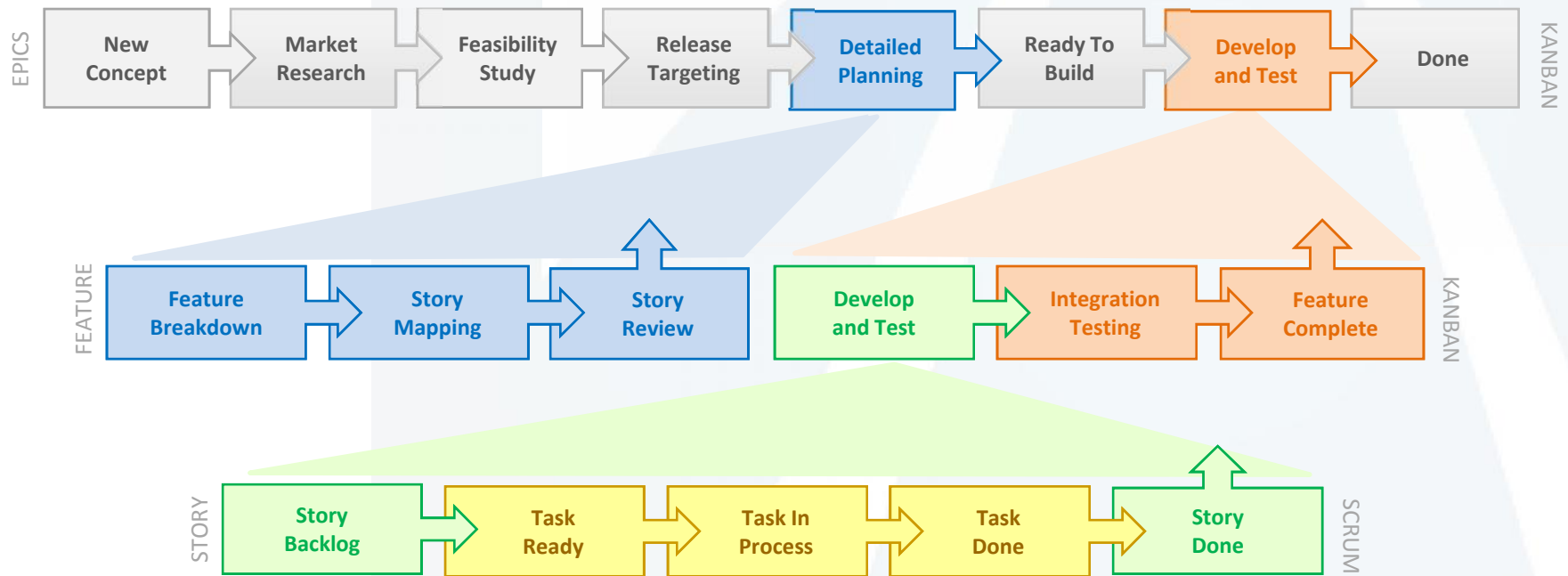
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Luck is not a factor.   Hope is not a strategy.   Fear is not an option.

The Portfolio Tier

- Idea list generation from multiple data feeds and sources

- High Level Estimation
- Solution Cost
- High Level Architecture
- Risk Analysis
- Feasibility

- Detailed Architecture
- Feature Mapping
- Acceptance Criteria
- Estimation
- Backlog

New Concept → **Market Research** → **Feasibility Study** → **Release Targeting** → **Detailed Planning** → **Ready To Build** → **Develop and Test** → **Done**

- Market Research
- Customer Research
- Field Feedback
- Business Case & ROI
- Competitive Analysis

- Forced Priority
- Certainty Curve

- All features are done
- Regression tests are completed
- Release Criteria are met

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Portfolio Tier Ownership

R Product Management
A Product Management
C Customer Advocate
I Product Owner Team

R Product Owner Team
A Product Owner Team
C Engineering
I Portfolio Team

R Product Management
A Product Management
C Customer Advocate
I Product Owner Team

R Product Management
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R Product Owner Team
A Product Owner Team
C Engineering
I Portfolio Team

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| New Concept | Market Research | Feasibility Study | Release Targeting | Detailed Planning | Ready To Build | Develop and Test | Done |

Portfolio Team
GATE RESPONSIBLITY

- Responsible - Those who do the work to achieve the task.
- Accountable - The one ultimately answerable for the correct and thorough completion of the deliverable.
- Consulted - Those whose opinions are sought, typically subject matter experts and with whom there is two-way communication.
- Informed - Those who are kept up-to-date on progress, often only on completion of the task or deliverable.

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The Program Tier

- Feature List for the Parent Epic

- Estimate Sanity Check
- Spike Identification
- Review for Feasibility
- Review of Acceptance Criteria
- Story Spanning
- Story Tasking

- Feature Testing Non-Functional
- Validation of Automated Tests

Feature Breakdown → **Story Mapping** → **Story Review**   **Develop and Test** → **Integration Testing** → **Feature Complete**

- Story Writing
- MMF
- Estimating
- High Level Design
- UX Mockups

- Detailed Design
- Code
- Unit Test
- Code Review
- Functional Test
- User Story
- Product Owner Acceptance

- All Stories are done
- Feature Level testing is completed
- Defect criteria are met
- Feature Check list from RDS template
- Performance and Sizing Complete

A stand alone features must have these acceptance criteria (x, x, x)

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Program Tier Ownership

R Product Owner Team
A Product Owner Team
C Engineering
I Engineering

R Engineering
A Engineering
C Product Owner Team
I Product Owner Team

R Product Owner Team
A Product Owner Team
C Engineering
I Portfolio

R Product Owner Team
A Product Owner Team
C Customer Advocate
I Engineering

R Engineering
A Product Owner Team
C Product Owner Team
I Product Owner Team

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A Engineering
C Product Owner Team
I Product Owner Team

Feature Breakdown → **Story Mapping** → **Story Review**   **Develop and Test** → **Integration Testing** → **Feature Complete**

Product Owner Team
GATE RESPONSIBLITY

Engineering Team
GATE RESPONSIBLITY

Engineering Team
GATE RESPONSIBLITY

Product Owner Team
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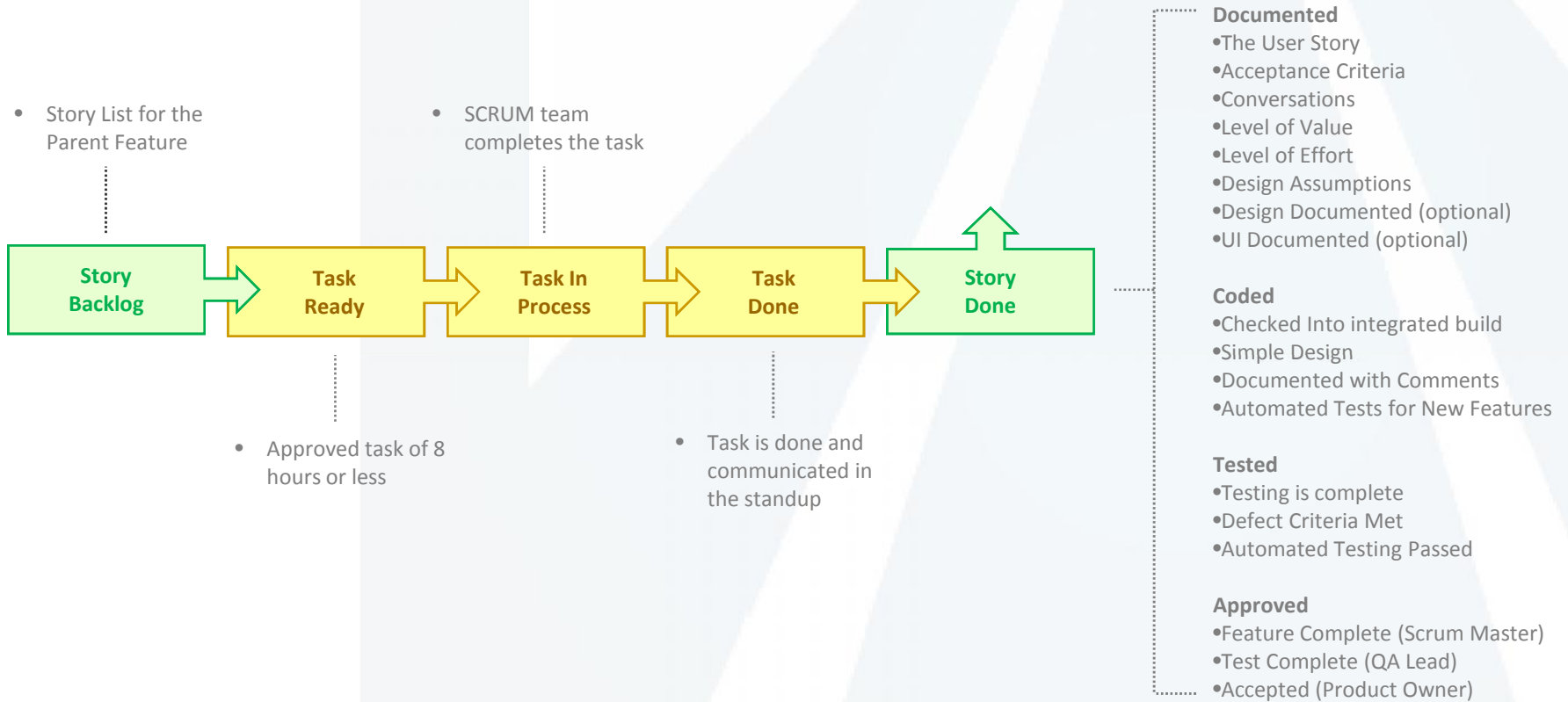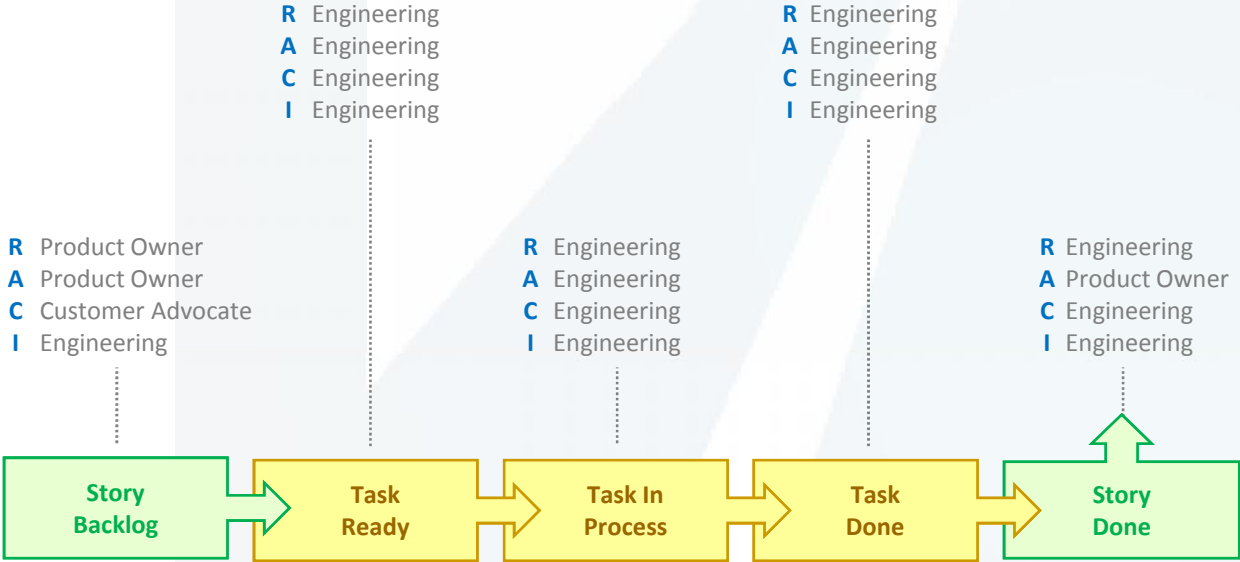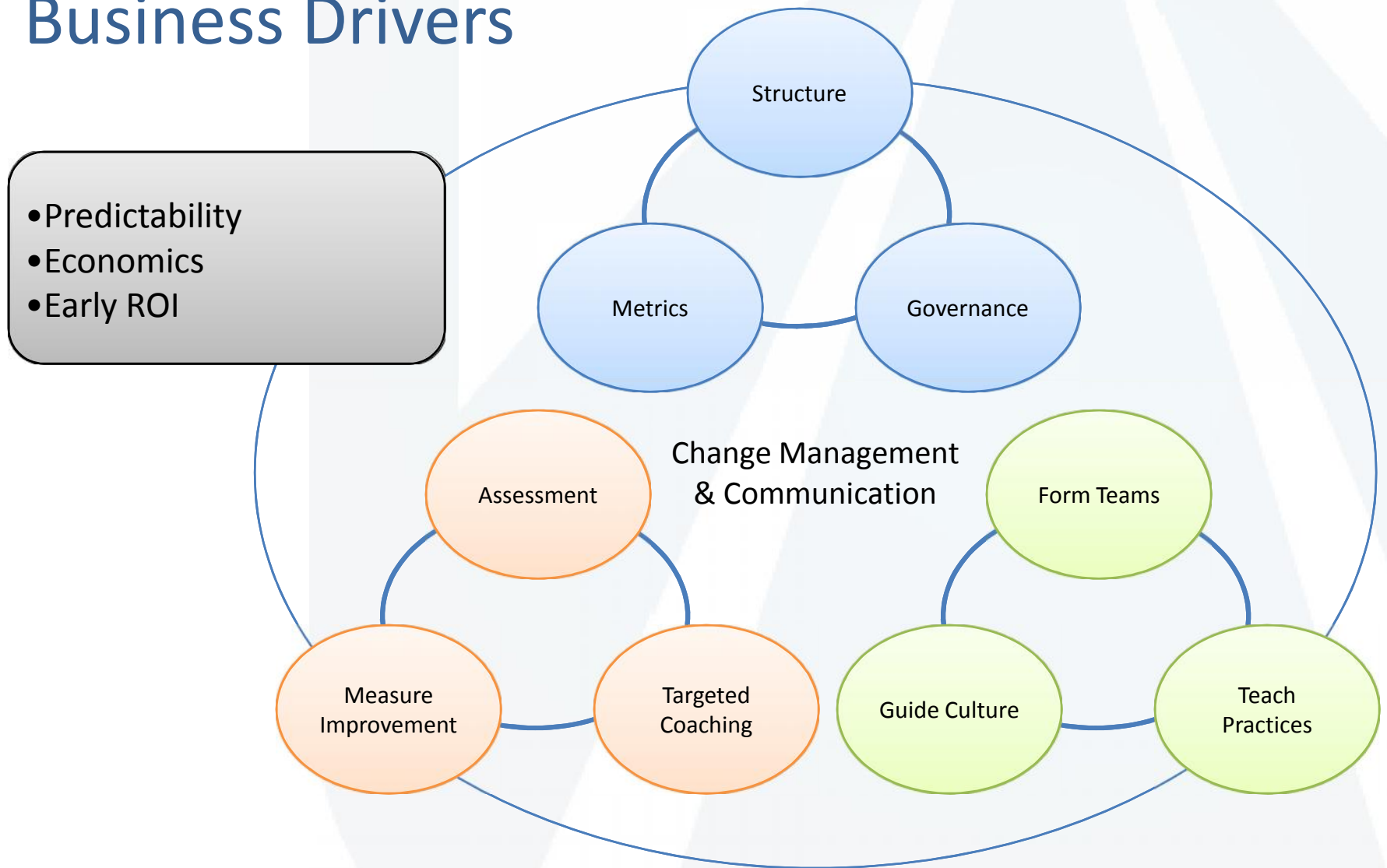
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The Project Tier

- Story List for the Parent Feature

- SCRUM team completes the task

Documented
- The User Story
- Acceptance Criteria
- Conversations
- Level of Value
- Level of Effort
- Design Assumptions
- Design Documented (optional)
- UI Documented (optional)

Story Backlog	Task Ready	Task In Process	Task Done	Story Done

Coded
- Checked Into integrated build
- Simple Design
- Documented with Comments
- Automated Tests for New Features

- Approved task of 8 hours or less

- Task is done and communicated in the standup

Tested
- Testing is complete
- Defect Criteria Met
- Automated Testing Passed

Approved
- Feature Complete (Scrum Master)
- Test Complete (QA Lead)
- Accepted (Product Owner)

Stand alone stories must have these acceptance criteria (x, x, x)

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Project Tier Ownership

R Engineering
A Engineering
C Engineering
I Engineering

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A Engineering
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I Engineering

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C Customer Advocate
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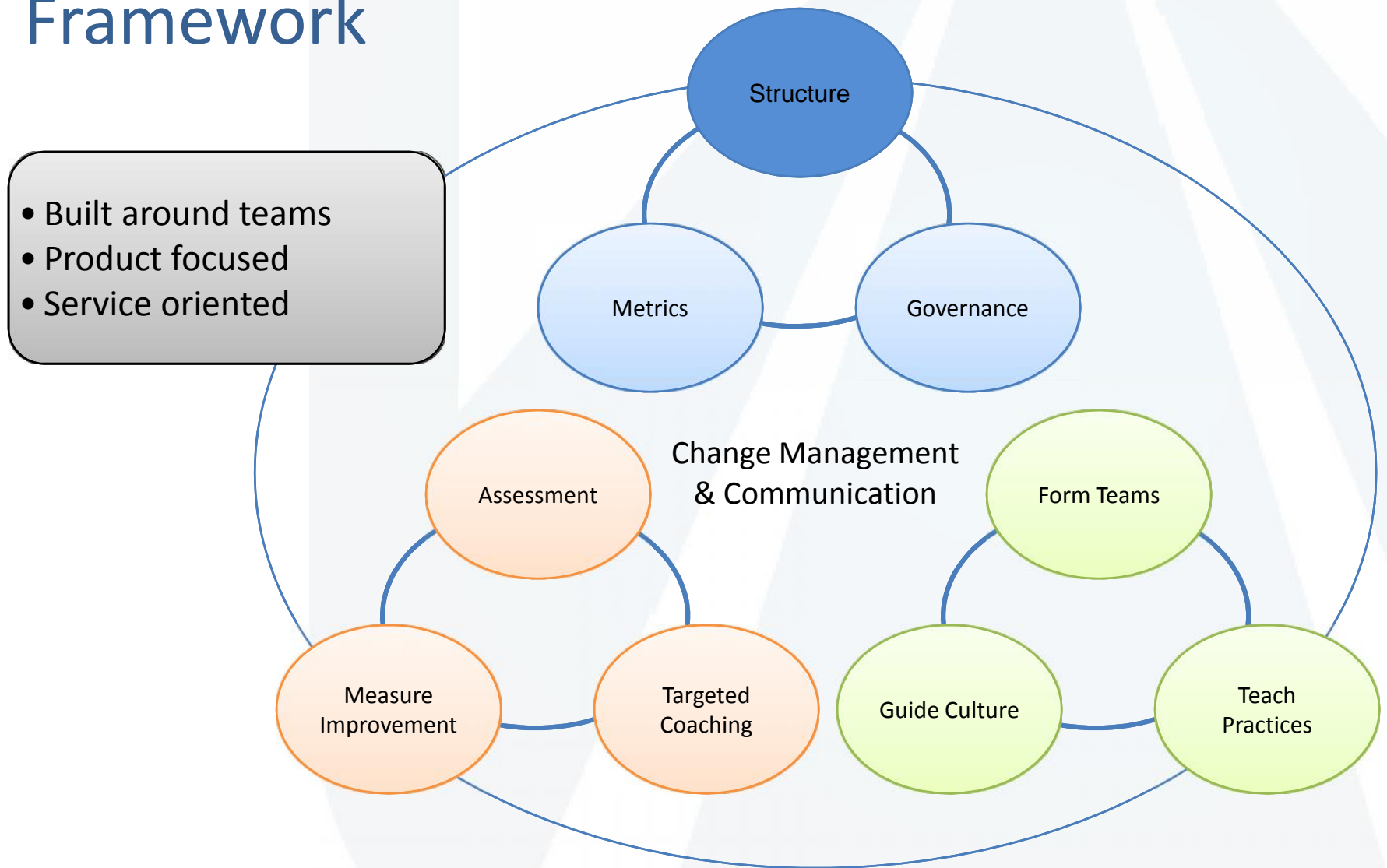LeadingAgi.   Luck is not a factor.   Hope is not a strategy.   Fear is not an option.
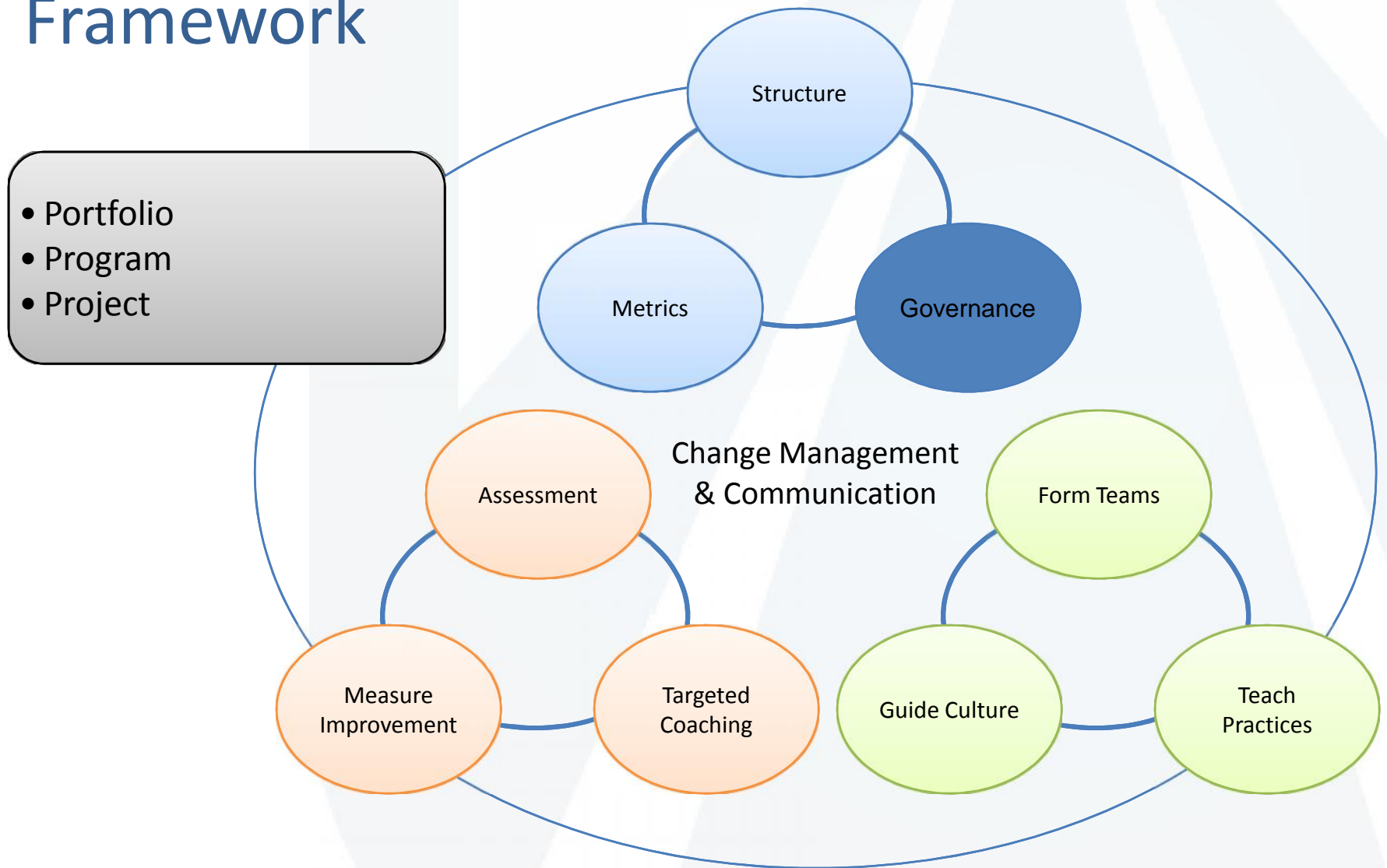
Agile Transformation

Understand Business Drivers

- Predictability
- Economics
- Early ROI

Structure

Metrics

Governance

Change Management & Communication

Assessment

Form Teams

Measure Improvement

Targeted Coaching

Guide Culture

Teach Practices

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Define the Operational Framework

- Built around teams
- Product focused
- Service oriented

Structure

Metrics

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Define the Operational Framework

- Portfolio
- Program
- Project

Structure

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Define the Operational Framework

- Return on Investment
- Throughput/Cost of Delay
- Capitalization

Structure

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Introduce Change Incrementally

- Independent
- Small
- Entrepreneurial

Structure

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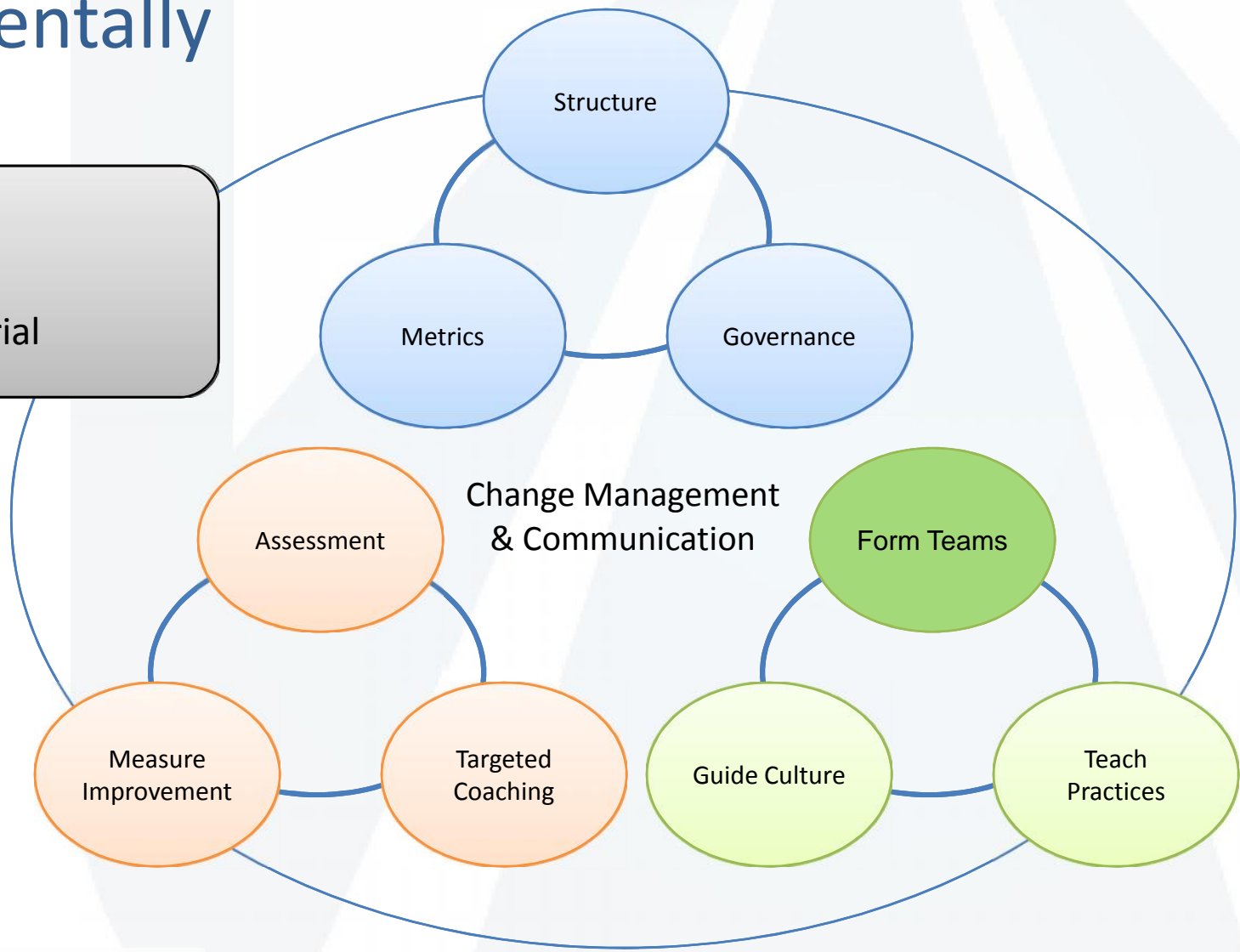
Introduce Change Incrementally

- Product definition
- Project management
- Technical and delivery

Structure

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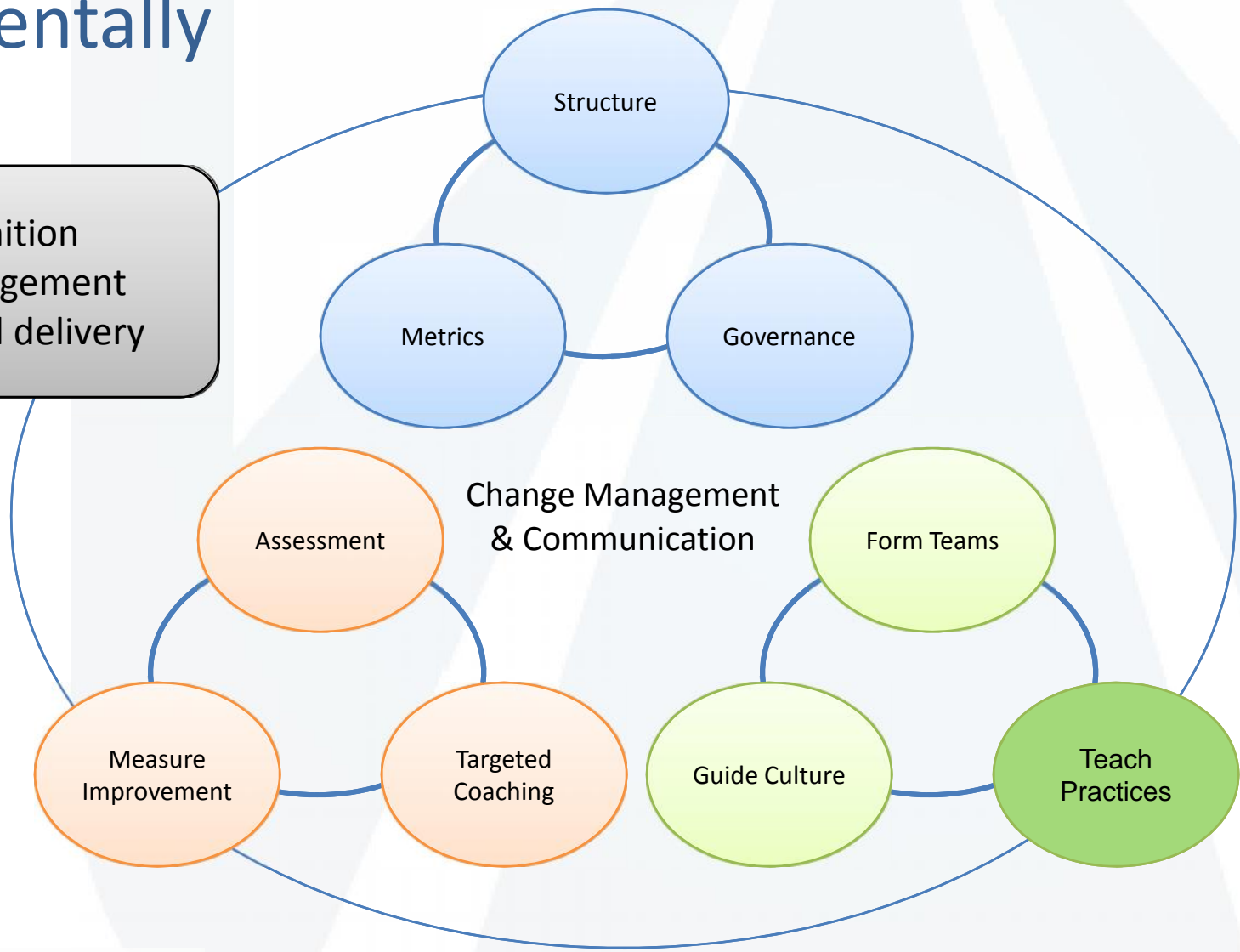
Introduce Change Incrementally

- Trust
- Accountability
- Adaptability

Structure

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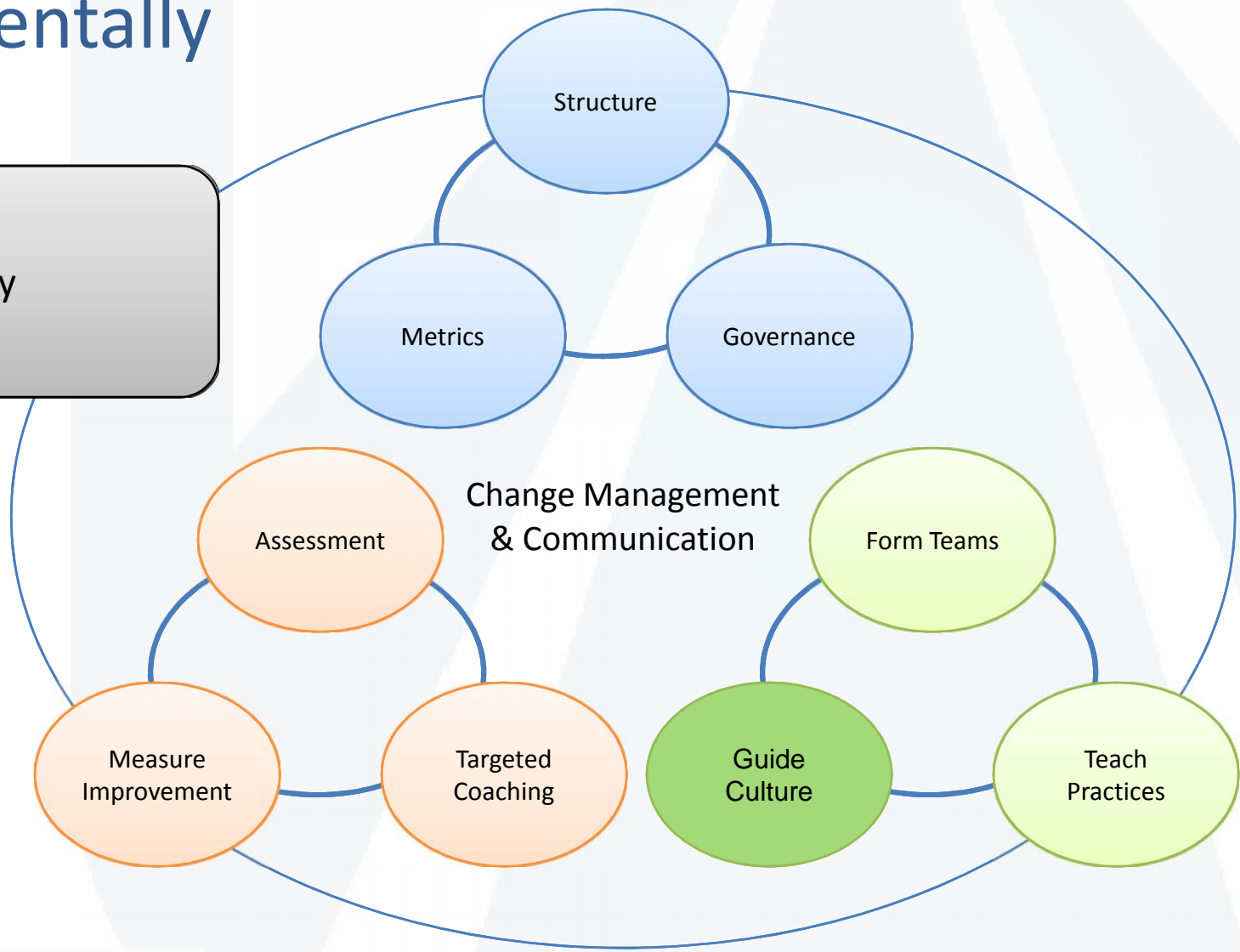
Measure Improvement

- Capability focused
- Objectively assessed
- Focus on sustainability

Structure

Metrics

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Measure Improvement

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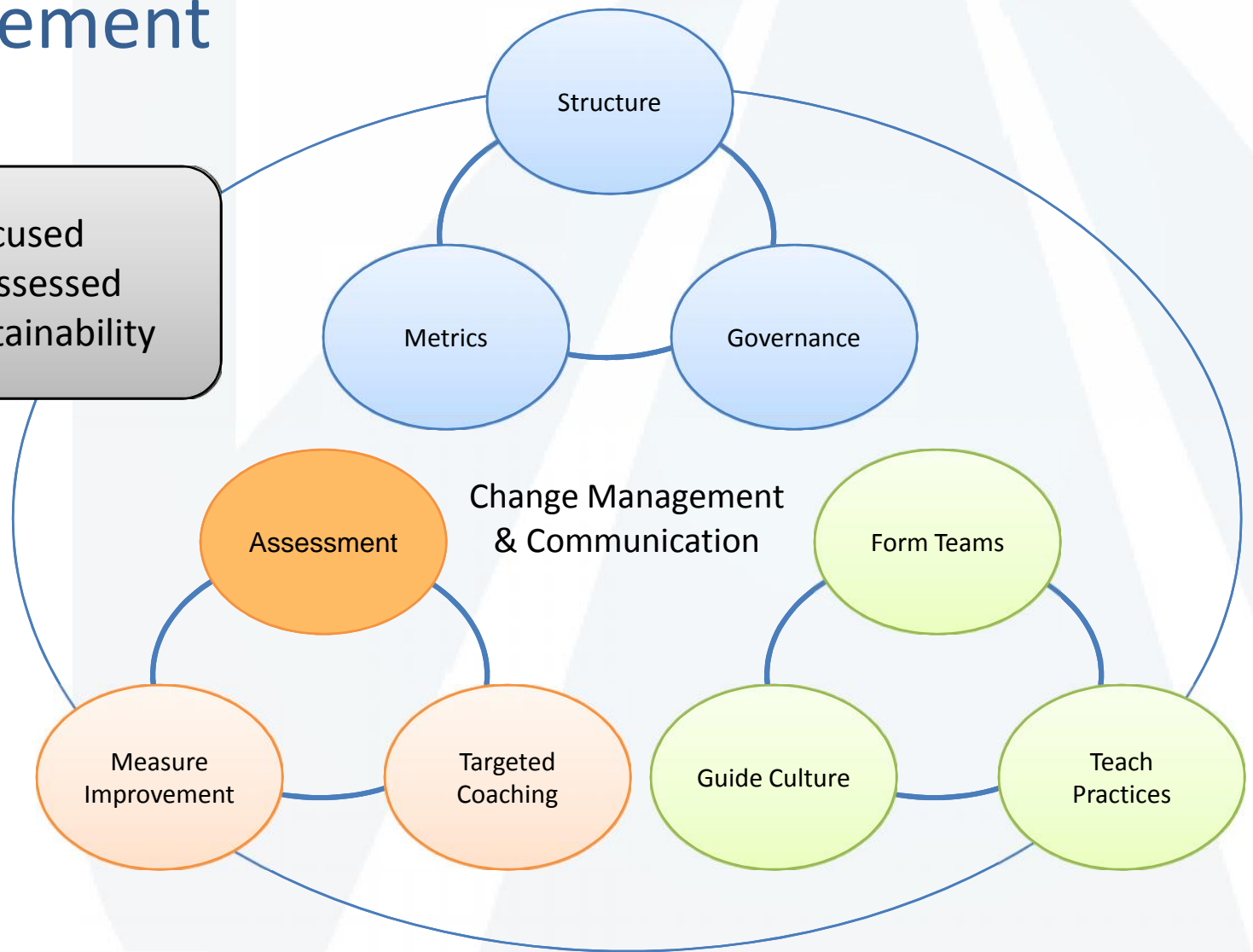
Measure Improvement

- Training
- Workshops
- Mentoring

Structure

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Form Teams

Measure Improvement

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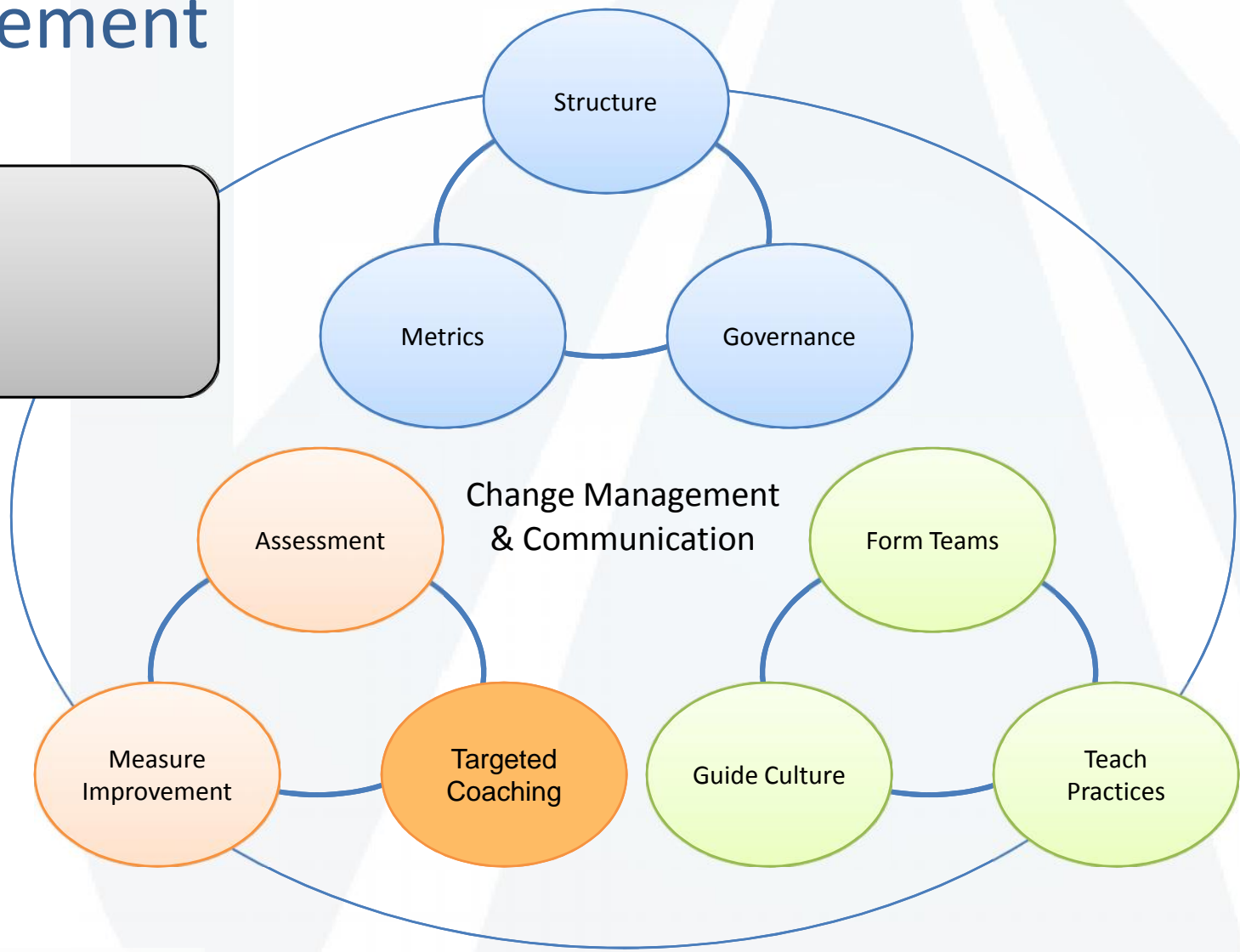
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Measure Improvement

- Demonstrable progress
- Outcomes focused
- Map to business drivers

Structure

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Measure Improvement

Targeted Coaching

Guide Culture

Teach Practices
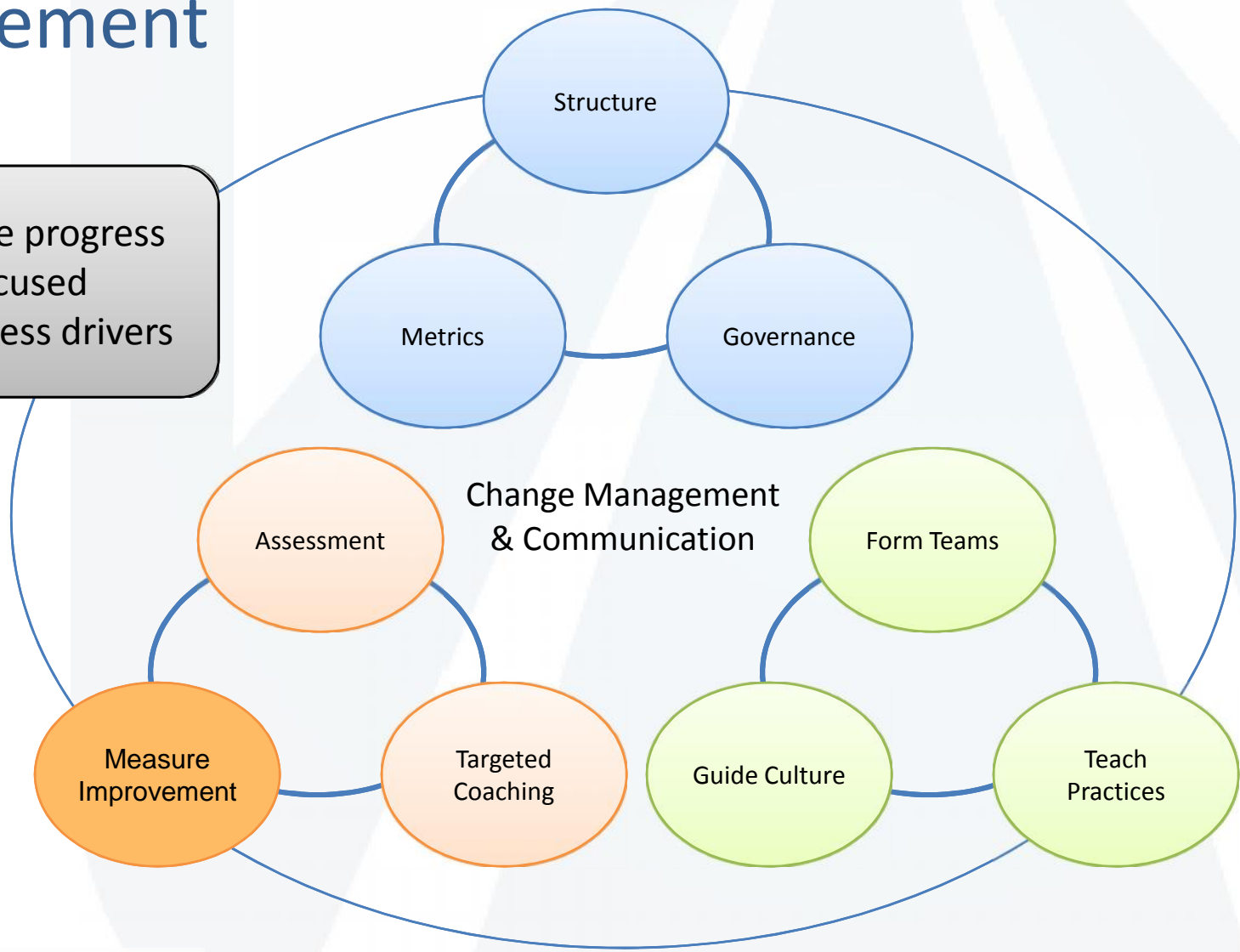
Manage Change

•Quick wins
•Identify champions
•Centers of excellence

Structure

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& Communication

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Measure
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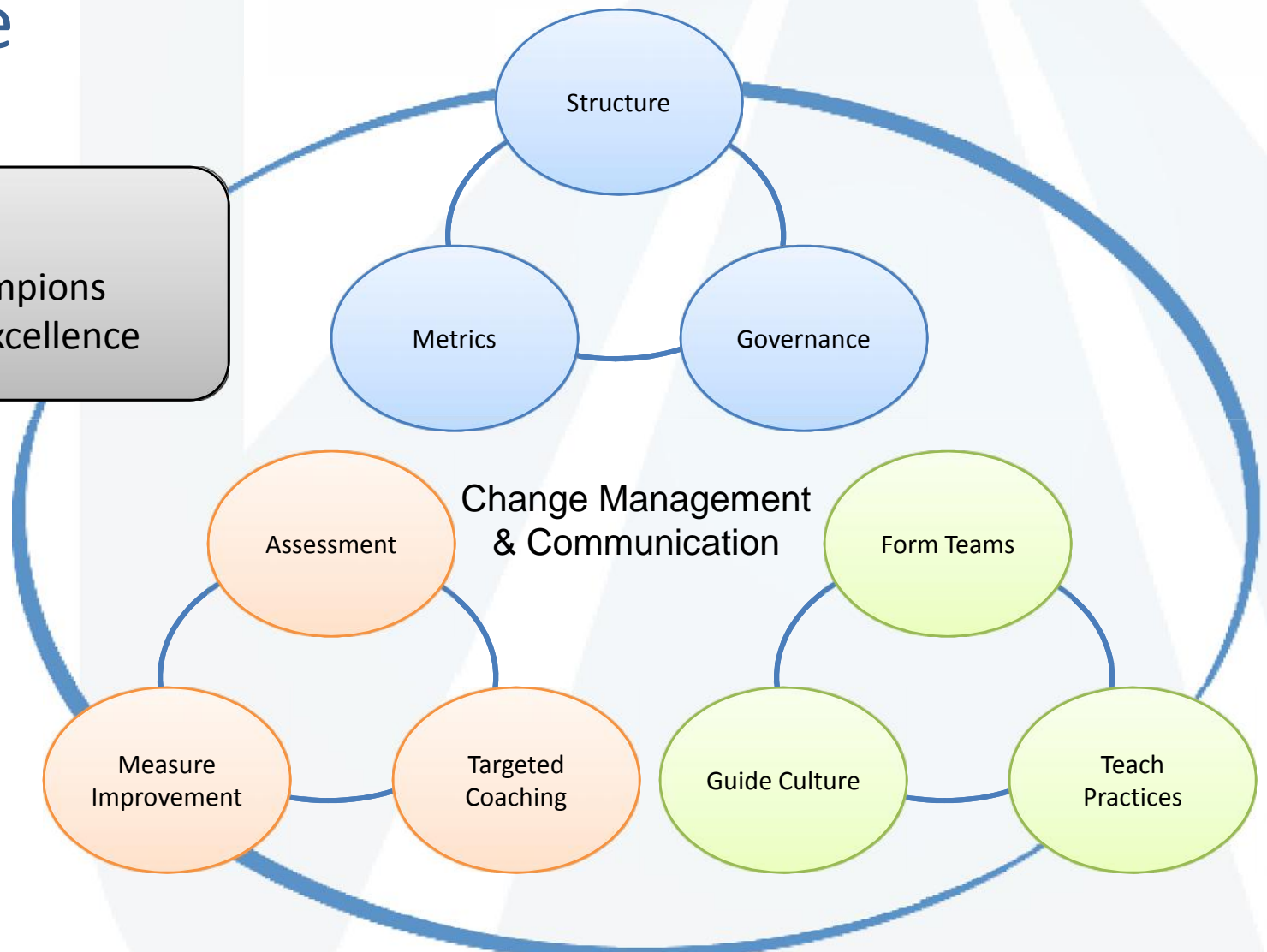
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Tie Back To Business Drivers

- Predictability
- Quality
- Early ROI

Structure

Metrics

Governance

Change Management & Communication

Assessment

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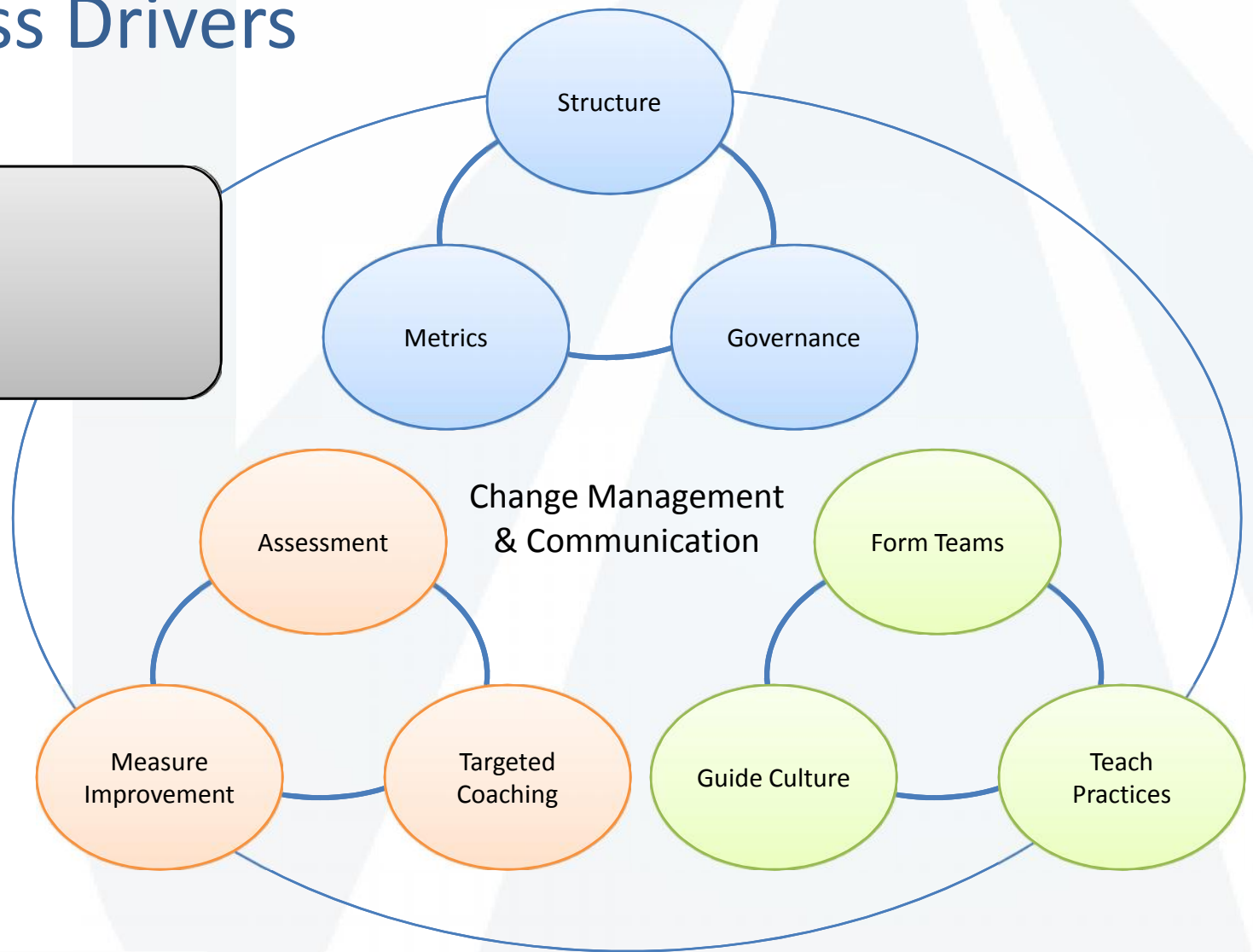
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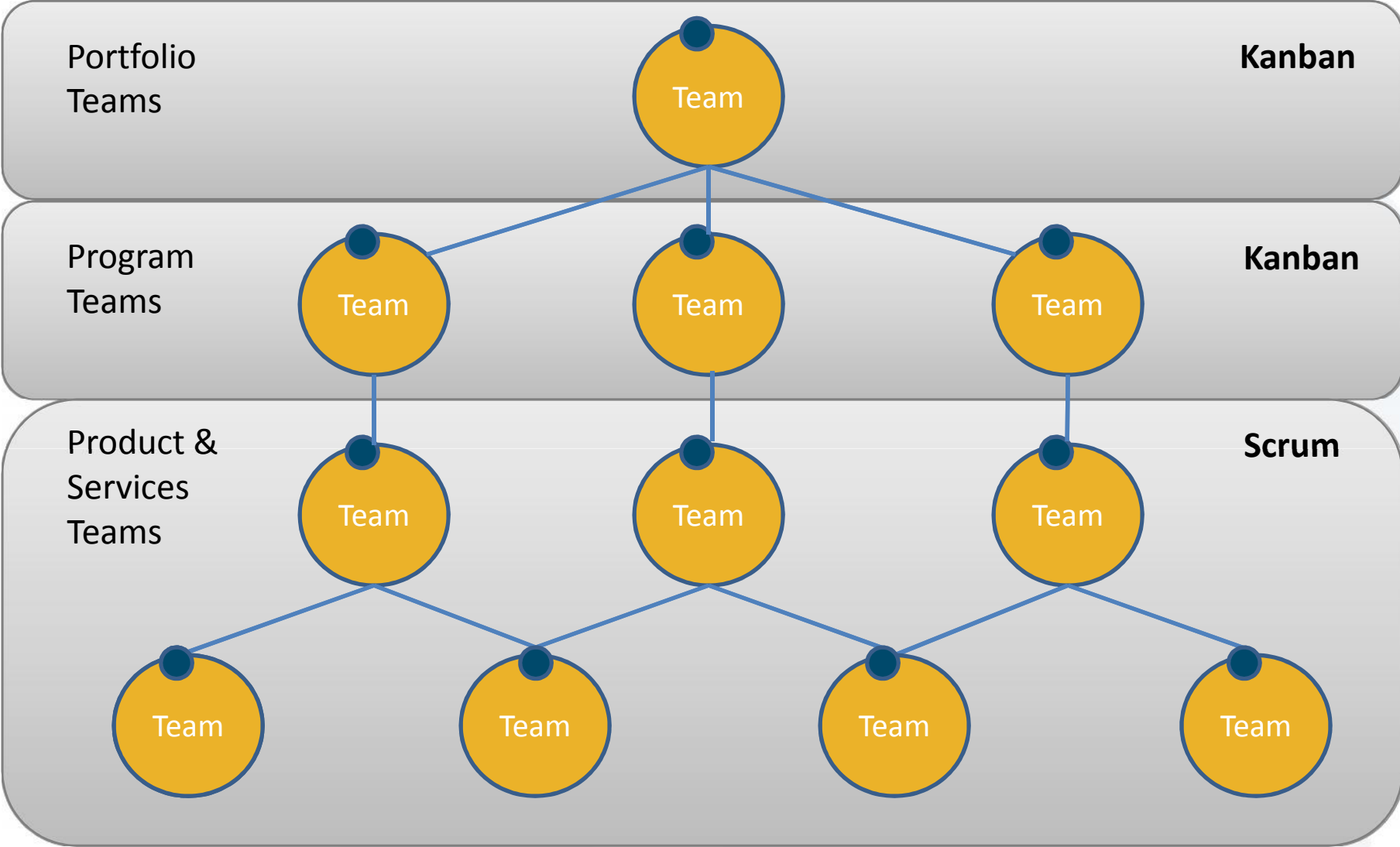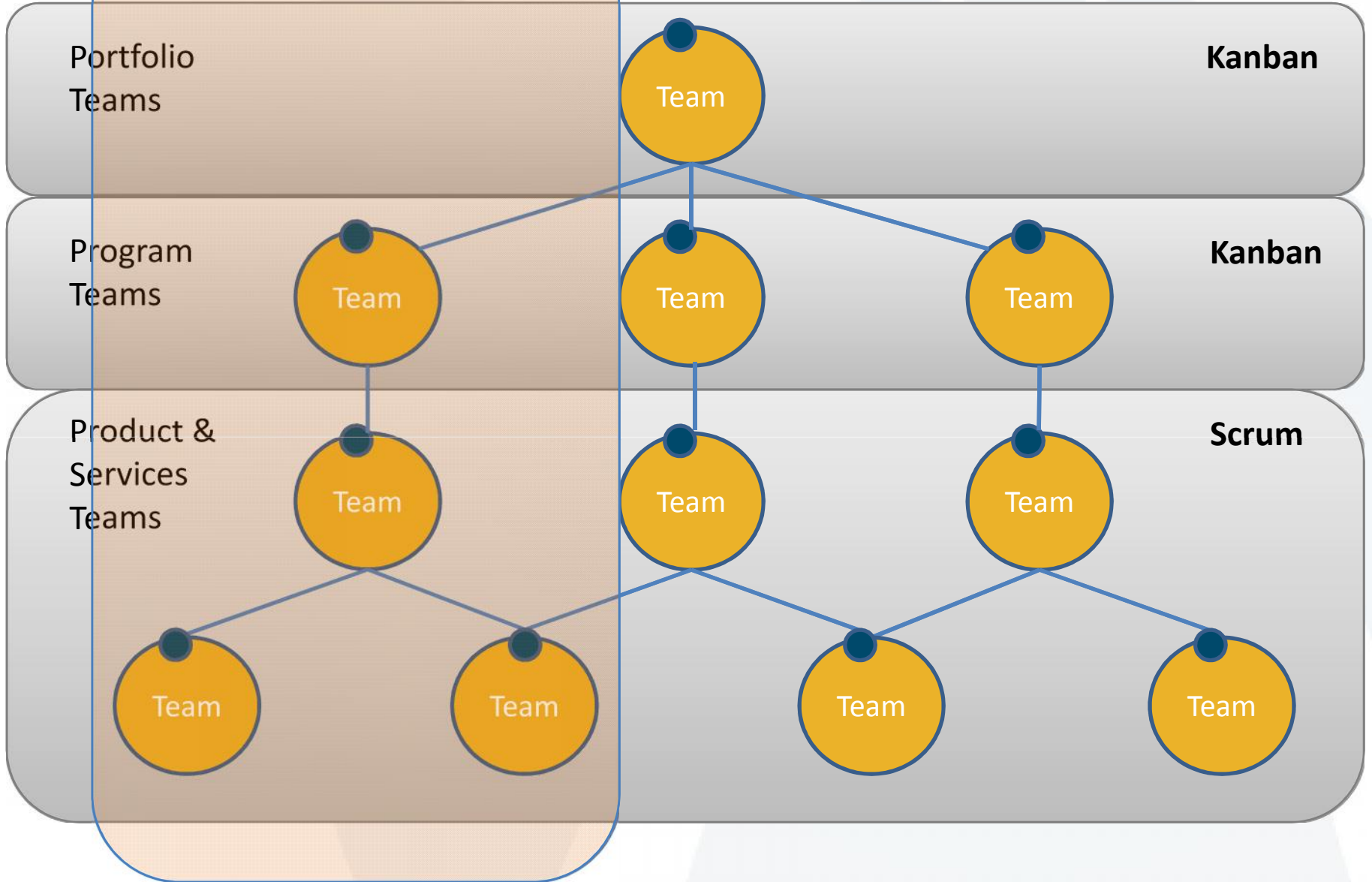
Sustainable Transformation

Intentionally

Executive
- Operational model aligned with the strategy
- Credible plan
- Demonstrate progress

Management
- Role clarity
- Success is measurable
- Maintain organizational influence

Performer
- Supported
- Possible
- Demonstrate success

Thank you!

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