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
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Why is it hard?

Luck is not a factor. Hope is not a strategy. Fear is not an option.
Agile is optimized for small teams

Luck is not a factor. Hope is not a strategy. Fear is not an option.
User Stories are too small in an Enterprise Context
Multiple teams introduce dependencies and coordination challenges

Team

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Team
It’s hard when...

We show what it looks like

But Not

How organizations will get there safely
Safety

- Successfully do your job
- Feed your family / Kids in college
- Viable over time
You have to align various perspectives

Executive

Management

Performer
Safety is different depending on your perspective

Executive

Management

Performer

• Supported
• Possible
• Demonstrate success
Safety is different depending on your perspective

Executive

• Role clarity
• Success is measurable
• Maintain organizational influence

Management

Supported
Possible
Demonstrate success

Performer
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
- Possible
- Demonstrate success

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Different Teams for Different Jobs

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Services Teams – These teams support common services across product lines. These teams support the needs of the product teams.
Product Teams – These teams integrate services and write customer facing features. This is the proto-typical Scrum team.

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

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

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Agile Governance

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Development Flow

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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

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**GATE RESPONSIBILITY**

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

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- **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 in the task, often two-way communication is desired. Those who are kept up to date on progress, often only on completion of the task or deliverable.
- **Informed** - Those who are kept up to date on progress.
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

* Stand alone features must meet these acceptance criteria (x, x, x)

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Program Tier Ownership

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- Consulted - Those whose opinions are sought, typically subject matter experts, with whom there is a two-way communication flow.
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The Project Tier

- Story List for the Parent Feature
- SCRUM team completes the task
- Approved task of 8 hours or less
- Task is done and communicated in the standup

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

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

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

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

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**Project Tier Ownership**

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Agile Transformation
Understand Business Drivers

- Predictability
- Economics
- Early ROI

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Change Management & Communication

- Assessment
- Measure Improvement
- Targeted Coaching

- Governance
- Guide Culture
- Teach Practices

- Structure
- Form Teams

LeadingAgile
Define the Operational Framework

- Built around teams
- Product focused
- Service oriented

Structure

- Metrics
- Governance

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Define the Operational Framework

- Portfolio
- Program
- Project

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Change Management & Communication
- Assessment
- Measure Improvement
- Targeted Coaching
- Form Teams
- Guide Culture
- Teach Practices
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- Teach Practices
Define the Operational Framework

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

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Structure

Governance

Metrics

Assessment

Targeted Coaching

Guide Culture

Form Teams

Teach Practices

Measure Improvement

Leading Agile
Introduce Change Incrementally

- Independent
- Small
- Entrepreneurial

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Change Management & Communication

- Assessment
- Measure Improvement
- Targeted Coaching
- Form Teams
- Guide Culture
- Teach Practices

Structure

Governance

Metrics
Introduce Change Incrementally

- Product definition
- Project management
- Technical and delivery

Change Management & Communication

- Assessment
- Measure Improvement
- Targeted Coaching
- Guide Culture
- Form Teams
- Teach Practices

Structure

Metrics

Governance

Luck is not a factor. Hope is not a strategy. Fear is not an option.
Introduce Change Incrementally

- Trust
- Accountability
- Adaptability

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Change Management & Communication

- Form Teams
- Teach Practices
- Guide Culture
- Targeted Coaching
- Measure Improvement
- Assessment

Structure
- Governance
- Metrics
Measure Improvement

- Capability focused
- Objectively assessed
- Focus on sustainability

Change Management & Communication
- Assessment
- Measure Improvement
- Targeted Coaching
- Form Teams
- Guide Culture
- Teach Practices

Structure
- Governance
- Metrics

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Measure Improvement

- Training
- Workshops
- Mentoring

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Measure Improvement

- Demonstrable progress
- Outcomes focused
- Map to business drivers

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Change Management & Communication

- Form Teams
- Teach Practices
- Guide Culture
- Targeted Coaching
- Measure Improvement

Structure

Metrics

Governance
Manage Change

- Quick wins
- Identify champions
- Centers of excellence

Change Management & Communication
- Assessment
- Measure Improvement
- Targeted Coaching
- Guide Culture
- Form Teams
- Teach Practices

Structure
- Metrics
- Governance

'Luck is not a factor. Hope is not a strategy. Fear is not an option.'
Tie Back To Business Drivers

- Predictability
- Quality
- Early ROI

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Change Management & Communication

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- Measure Improvement
- Targeted Coaching

Form Teams
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Structure
- Governance
- Metrics

Leading Agile
Slicing

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Sustainable Transformation
Intentionally

Executive
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- Credible plan
- Demonstrate progress

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

Performer
- Supported
- Possible
- Demonstrate success
Thank you!

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