Designing and Implementing a Successful Agile Transformation

David Hicks
**Services**
- Management Consultancy
- Training
- Delivery

**Expertise**
- Agile Methods
- Software Development
- Project Management
- Organisational Transformation

**RADTAC Proposition**
- All of the leading Agile methods
- With wider approaches beyond Agile
- And the ability to make them scale and stick

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Some RADTAC Engagements

eGov Programme
Agile Enablement
Integrates MSP, P2, OGC, Agile

NHS
Agile Enablement
and Transformation
Integrates MSP, P2, Agile

CAPITA
CHILDREN'S SERVICES
Agile Enablement
and Transformation;
Libra Programme
Stream delivery management

Bupa
Agile Enablement
and Transformation
European Portal
Agile Development

Rolls-Royce
PLM Programme
Agile Enablement
Integrates PMI, Agile

AOL
Agile Enablement
and Transformation

Fidelity
Agile Enablement
and Transformation;

Jardine Lloyd Thompson
Agile Enablement
and Transformation

British Airways
Agile Enablement
and Transformation

Hiscox
Agile Enablement
and Transformation

NHS Spine & eBorders
PM & Delivery Method
Agile training
Integrates P2 and Agile
David Hicks

» RADTAC Founder & Director
» Specialist in Lean and Agile since 1998
» Agile Alliance Founder Member in 2002
» Consulting, Training, Delivery

» Qualifications

- Certified Scrum Trainer, Scrum Professional, ScrumMaster and Scrum Product Owner
- Certified Agile Project Management Trainer
- Certified Lean IT Trainer
- Certified DSDM Trainer and Advanced Practitioner
- Certified Agile Leader Advanced Practitioner
Agenda

- Critical Success Factors for Agile Transition
- Transition Management
- Training and Education
- Coaching Support and Skills Transfer
- Processes and Standards
- Related Capabilities
Agile Transformation – CSFs

Vision
- A clear Agile vision and strategy for achieving it
- A sense of urgency
- Strong, united senior management sponsorship
- Communication of the vision and progress towards it

Action
- Empowerment of broad-based action
- Alignment of any existing Agile activity
- Generation of quick wins
- Consolidation of quick wins

Traction
- Alignment of all processes to enable inter-operability
- Embedding Agile in the organisation and culture
RADTAC Agile Enablement Approach

Iterative and incremental: Periodic Review and Adaptation of Plans and Approach

- Transition Management
- Project Support
- Training and Education

Start Small and/or Simple
Full Transition to Agile over time

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RADTAC Agile Enablement Approach

Iterative and incremental: Periodic Review and Adaptation of Plans and Approach

**Transition Management**
- Vision; Objectives; Benefits; Plan; Transition Team; Measures; Stakeholders; Culture

**Training and Education**
- Training Needs Analysis; Training Organisation & Portfolio; Tailor & Deliver Training

**Coaching Support and Skills Transfer**
- Initial Pilot/s & beyond; Coaching; Assurance; Reviews; Interim PM & Delivery Resource

**Processes and Standards**
- Tailor and Integrate selected Methods / Practices; Develop; Deliver; Communicate; Refine

**Related Capability Building**
- Identify & Develop: e.g. Portfolio; Governance; Suppliers; HR; Infrastructure; Skills etc.
Aim for the 5th Focus: Enterprise Agile

Deliver the Right products

Deliver the Products right

1st FOCUS
Measurement, Tools, Techniques

2nd FOCUS
Teams / People

3rd FOCUS
Projects / Products

4th FOCUS
Programmes / Portfolios

5th FOCUS
Business
Stakeholder Management Strategies

» Selling Agile
» Productivity vs. Value added
» Measuring ROI
» Measuring rollout
» Investment of time
» Experienced Agile Transformation PM
Stakeholder Management Strategies

Synergy

Use informal ways to get to them

Zealots

Allies

Use to influence

Waverers

Oppo

Zealots

Mutineers

Might not be worth spending too much time on them

Passives

Moaners

Opponents

Schismatics

Antagonism
The Organisation as Iceberg

The Organisation as Iceberg

New ‘Agile’ Organisational Structure, Roles, Processes and Tools

No change to underlying Customs, Values, Behaviours, Language, Beliefs, Traditions, Stereotypes, Taboos etc.

Effective Change Management

Time

Past  Future

Direction

Support

EXPLORATION

RESISTANCE

Information

Open  Hidden

Encouragement

DENIAL

Effectiveness & morale

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Agenda

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Transition Management

Vision; Objectives; Benefits; Plan; Transition Team; Measures; Stakeholders; Culture

- Raise Agile Transformation Business Case
  - Strengthen drivers, perform Cost / Risk / Benefit Analysis
- Define clear Scope and internal interactions
- Agile Readiness Analysis to finalise plans for Release One and overall transformation
- Start-up and Initiate Transformation Project
  - Implement Transformation Project Board
  - Deliver transformation using Agile (Scrum) + appropriate local practices
- Stakeholder Analysis and Targeted Communication
  - Identify ‘WIFM’ for different stakeholder groups
- Initiate measurement KPIs and RADTAC Transformation BRAG
- Identify ‘Hotspots’ (quick wins) and implement quick-changes
Example Organisation Structure

Key:
- **Light Blue** = General Manager responsible to Director for Agile Rollout
- **Red** = 13 Delivery Managers – 1-200 staff each
- **Green & Blue** = Other Managers whose areas also most impacted
# Agile Transformation Stories

## Transition Management

| Sponsorship | Training Plan | Agile Team Process | Coaching Plan | Tools & Environment |
| Vision & Objectives | Team Training | Project Process | Internal Coaches | Organising for Agility |
| Governance | Team Lead Training | Technical Standards | Team Coaching | Skills |
| Plan and Budget | Agile PM Training | Deliverables | Technical Coaching | Empowerment |

## Training and Education

| Communication | Customer Training | Roles and Responsibilities | Team Lead Coaching | Customer Involvement |
| Cultural Change | Facilitation Training | Templates and Examples | PM Coaching | Agile Portfolio |
| Specialist Training | Intranet / Wiki | Customer Coaching | Suppliers |

## Processes and Organisation

| Awareness Training | Process Improvement | Senior Management Consulting | Building Teams |
| Executive Briefing | Process Integration | Transformation Consulting |||
Example Team Enablement Story

Customer Rep In The Team

As a Team member
I want an empowered business decision maker to work closely with us who can clarify user stories and make prioritisation decisions.
So that we can develop the right things quickly and efficiently as possible.

Acceptance Criteria

Is there a nominated Customer for the team?
Does the Customer understand the Value of the stories in the context of the project?
Does the Customer have sufficient decision-making power for Planning purposes?
Does the Customer have context knowledge and update the team on changes?
Is the Customer co-located with the team?
Does the Customer take part in the creation of the product?
Communication

As a Stakeholder in the Agile Transformation I want communication mechanisms to be established, and the whole organisation to be engaged in a dialogue of communication about the Agile Transformation so that the profile of the transformation is maintained and everyone is engaged and understands progress and benefits being achieved.

Acceptance Criteria

Has an Analysis of Stakeholders in the Agile Transformation been performed?
Has a communication plan been created based on the Stakeholder analysis?
Does the communication plan include communications other than the formal ‘Transformation Progress Report’?
Is communication of specific messages targeted at different stakeholder groups?
Are a variety of communication channels used?
Does communication happen regularly and frequently?
Is the communication two-way, and clearly seen to be two-way?
Are communication specialists engaged to assist with communications?
### Benefits Dashboard: Balanced Agile Scorecard

#### Value
- Customer’s view of service
- Stakeholders view of benefits
- Feature Time to market
- Feature cycle time - raised to done (customer’s definition of done)

#### Quality
- Running tested features
- Application % Technical Debt
- Bugs fixed and outstanding
- Application % test coverage

#### Productivity
- Function Points or Features done
- Velocity / Sprint
- Feature cycle time to done (teams definition of done)
- Predictability (points planned vs points delivered) / Sprint and Release

#### Collaboration
- Story cycle time
- Team happiness
  - Vision understanding
  - Morale
  - Failure rate (Retrospectives)
  - Learning Tolerance (fail/learn fast)
Agenda

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» Processes and Standards
» Related Capabilities
Training Needs Analysis
- Management overview: make ‘Owners’ aware of agile responsibilities
- Customer Overview
- Agile Practitioner training – accredited?
- Agile Project Management training

Create Agile Training Portfolio
- Customised for Process and Standards
- Customised for Audience
- Culturally aware

Deep Dive Masterclass Workshops
- Focussed on specific issues
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<th>Management and Stakeholders</th>
<th>All Agile / Lean Professionals</th>
<th>Project Managers, ScrumMasters and Team Leaders</th>
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**Pragmatic Agile™ Briefing ½ day**

Analysts, Product Owners, Customers and Users

- **Pragmatic Agile™ Software and Test-Driven Development 3 days (Accredited by Scrum Alliance)**
  Leading to Certified Scrum Developer

**Architects, Developers and Testers**

- **Pragmatic Agile™ Workshop Facilitation Skills 3 / 4 days**

**Coaches and Facilitators**

- **Pragmatic Agile™ Coaching Soft Skills 2 days**

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Example: Tailored Training Courses

- **Scrum Team Members**
  - 2 day Tailored Agile Team Training
  - 3 day Tech Agile

- **Product Owners**
  - 1 day Advanced Product Owner Skills
  - 2 day CSM

- **Internal Coaches**
  - 1 day Advanced ScrumMaster Skills
  - 2 day Coaching Skills
  - ½ day Master Classes

- **Scrum Masters**
  - Continuous Coaching

- **Managers, Architects etc.**
  - 3 day Agile PM
  - Ad-hoc Briefings

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Agenda

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» Training and Education
» Coaching Support and Skills Transfer
» Processes and Standards
» Related Capabilities
Coaching Support and Skills Transfer

Initial Pilot/s & beyond; Coaching; Assurance; Reviews; Interim PM & Delivery Resources

- **Identify Pilot Projects / support projects**
  - Implement Agile coaches to support Agile shaping of projects and teams
  - Transform teams from within using RADTAC Team Capability BRAG sheets

- **Identify and support Agile Champion/s**
  - Identify within each key organisational group
  - Champions shaped as an Agile team
  - Fundamental to driving change forward
  - RADTAC Coach agrees incremental change plan with internal Champion and supports rollout

- **Identify and Develop internal Agile Coaches**
  - Implement Agile Coaching for internal future Agile Coaches

- **Continuing Agile Assurance (RADTAC Capability Stories)**
Example: Coaching Support

RADTAC Coaches or Delivery Catalysts

Agile Transition Project Manager

Layer 3 Agile Teams

Internal Champions / Coaches

Layer 2 Coaching

Principal Internal Coach

Coaching and Assessment

Layer 2 Teams

Champions / Coaches

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# Agile Team Maturity Stories

<table>
<thead>
<tr>
<th>Project Management</th>
<th>Business / Product Management</th>
<th>Team Practices</th>
<th>Technical Practices</th>
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<td>Project Vision</td>
<td>Customer Rep In The Team</td>
<td>Stand Up Meetings</td>
<td>Pair Programming</td>
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<td>Stakeholder Roles</td>
<td>Agile Requirements Analysis</td>
<td>Iteration / Sprint Planning</td>
<td>Collective Code Ownership</td>
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<td>Project &amp; Release Planning</td>
<td>Agile Requirements Definition</td>
<td>Cross Functional Team Roles</td>
<td>Test Driven Development</td>
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<td>Information Radiators</td>
<td>Requirements Prioritisation</td>
<td>Collaborative Workspace</td>
<td>Automated Testing</td>
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<td>Project Management Deliverables</td>
<td>Minimum Sub-Set of Requirements</td>
<td>Team Deliverables</td>
<td>Continuous Integration and Build</td>
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<td>Project Retrospectives</td>
<td>Agile Contracts</td>
<td>Show and Tell</td>
<td>Automated Deployment</td>
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<td>Team Retrospectives</td>
<td>Simple Architecture and Design</td>
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<td>Team Rewards</td>
<td>Refactoring</td>
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Processes and Standards
Tailor and Integrate selected Methods / Practices; Develop; Deliver; Communicate; Refine

- Build single ‘one stop shop’ Process Guidance website
  - Accessible via Roles, Products, Process or Techniques
  - Integrated Agile Governance
- Across Value Chain
- Product and Project approach alignment
- Only build that which can be implemented, release fast

‘Knowledge Cube’
- Coding Standards
- Change Management Standards
- Programme Management
- Governance and Prince 2
- Etc........
# Lean Software Development

## PRINCIPLES | THINKING TOOLS
--- | ---
**Eliminate Waste** | The seven wastes of software development: Incomplete Work; Handoffs; Extra Features; Delays; Relearning; Defects; Task Switching
**Build Quality In** | Define tests not requirements
Build Quality In | Automate all tests
Continuous integration
**Create Knowledge** | Hypothesise; experiment; select best option
Create Knowledge | Mandate standards but challenge them
Focus on responding not predicting
**Defer Commitment** | Architect for any new feature at any time
Defer Commitment | Code experimentally: change-tolerant
Decide at the last responsible moment
**Deliver Fast** | Speed can target cost, quality & customer needs
Deliver Fast | Optimise Cycle Time not Utilisation
Work to capacity: set a repeatable velocity
**Respect People** | thrive on commitment; pride; trust & applause
Respect People | Good leaders bring-out the best in a team
Partner without conflict of interest
**Optimise the Whole** | Focus on the full value stream: concept to cash
Optimise the Whole | Whole products are built by whole teams
Measure the whole; not the parts

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The Scrum Process Framework

Daily Scrum Meeting

ScrumMaster facilitates all Team events

Sprint Planning
Tasks planned by Scrum Team

Sprint Backlog:
Tasks planned by Scrum Team

Sprint

24 hours

Sprint Review & Retrospective

Potentially Shippable Product Increment

Product Backlog
Anyone can contribute items
Owned by Product Owner

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The DSDM Atern Lifecycle Framework

- Pre-Project
- Exploration
- Engineering
- Feasibility
- Foundations
- Deployment
- Post-Project
The DSDM Atern Lifecycle Framework

- Pre-Project
- Exploration
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- Feasibility
- Foundations
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- Post-Project

DSDM Timebox = Scrum Sprint

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Team Leader = ScrumMaster

Specific roles within Team
Business Ambassador = Product Owner

- Multiple Business Ambassadors allowed
- Additional specific Project-level roles
- Additional roles to support team
<table>
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<tr>
<th>Inception</th>
<th>Milestone: Gain agreement on the lifecycle objectives for the project</th>
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![Agile / Open Unified Process Diagram](image-url)
### Agile / Open Unified Process

<table>
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**Iterations within each Phase repeat until Phase Milestone is achieved**

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Choosing Your Agile Approach

Other Methods & Wider Environment
- Traditional Waterfall, RUP
- Prince2
- PMI
- APM
- ITIL
- CMMI
- Six Sigma
- ISO etc.

Agile Project, Product and Service Management
- Agile Team Practices
  - Scrum
  - DSDM A/OUP
- Agile Practices
  - XP
- Agile Engineering Practices
  - XP

Individual Methods
- Lean IT

PragmaticAgile™ Combinations
- Lean IT
- Lean IT
- Lean IT
- Lean IT

Individual Methods
- XP
- XP
- XP
- XP...

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Example Enterprise Agile Framework

- Projects and Small Changes
- Multiple Teams
- UK & Off-shore
- Alignment with Business Goals
- Cross-team
  - Management
  - Architecture
  - Process Ownership
  - Configuration Management
  - Release Testing
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Related Capability Building
Identify & Develop: e.g. Portfolio; Governance; Suppliers; HR; Infrastructure; Skills etc.

- **Capability Gap Analysis - Likely Candidates**
  - Agile skills Gap Analysis
    - People who don’t want to transform will need to be addressed
    - Large reliance on very specialised SMEs?
  - Tools Gap Analysis
  - Portfolio and Programme Management
    - Shaping Agile Projects
    - Monitoring and controlling Agile Projects
    - Agile issue and Risk Management
  - Communication
    - Standard non-textual communication semantic
  - Value Chain Analysis
    - Based on Lean principles.
    - What in the current delivery Value Chain adds value?

- **Alignment of other capabilities with transformation project**
Related Capabilities

Run it as a Project
- Defined deliverables
- Resource it
- Active risk/issue mgmt
- Budget for it

Organising for Agile
- Feature teams
- Support & maintenance
- Account management
- No separate testing
- Time between projects

Building Teams
- Independent of line mgmt
- Ring fencing
- Skills database
- Soft skills
- Reward schemes

Empowerment
- “Fail fast”
- Speedy decisions
- Devolved budgets
- Reporting processes

Empowerment
- Multi-skilling
- Training needs
- Recruitment
- Mentoring

Involving the Customer
- Education and selling
- Customer champion
- User involvement strategy
- Role of interface groups
- Co-location

Suppliers
- Education
- Contracts & SLAs

Shaping the Portfolio
- Split-up big projects
- Clear initiation & completion
- Portfolio entry criteria
- Prioritisation
- Business architecture

Tools
- Development; Testing
- Configuration Management
- Informative Workspaces
- Workshop facilities
- Collaboration
Questions?

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- LinkedIn – David Hicks
- Twitter – @DaveHicksRADTAC
- Twitter – @RADTACLtd
Designing an Agile Transformation

David Hicks