Transitioning Your Organization to Lean-Agile
Lean for Executives
Product Portfolio Management
Business Product Owner

ASSESSMENTS
CONSULTING
TRAINING
COACHING

Lean Enterprise

Business

Team

technical

process

ILAFYT
Kanban / Scrum
ATDD / TDD / Design Patterns

Lean Management
Project Management

Manage ment
Before answering, a good question to ask is: What are common causes of failure in software development projects?

Where to start your Agile transition?
Remember

1. The goal is incremental business delivery

   NOT MERELY

1. the incremental building of software at the team level
Where to start your Agile transition?

It depends!*
Factors to Consider

- Size of the organization
- Challenges
- Structure
- Who is the transition sponsor?
- What is your culture for change?

Only after asking these questions can you reasonably ask the question of where should you start.
Size of the Organization

- Less than 70
- From 70 to 250
- Greater than 200 and less than 500
- Greater than 500

These have different dynamics
- Size of projects
- Interdependencies between projects
- Ability to create cross-functional teams
- Distribution of personnel & equipment
If $>70$ then the team is only a part of it.
Size Factors

- Not so much size of company, but size of development stream
- Team?
- Multiple teams?
- Multiple products?
- Complexity of products?
Goal of Lean-Agile Software Development

- Lean Software Development enables the discovery, prioritization, and deployment of highest business value.
- Agile methods enable the incremental delivery of business value based on the team’s development capabilities.
- Business Discovery must move at the same pace as team’s capacity (velocity).
Challenges

- Are executives attentive to Minimal Marketable Features?
- Are teams being overloaded?
  - Too many projects
  - Too many interruptions
- Does the team know how to do agile?
- What is the level of technical debt?
- What are the dependencies between the development teams?
Organizational Structure

- Do teams already exist?
- Are there enough skills / domain knowledge / legacy knowledge to go around
- Can teams be readily created?
- To what extent are your folks working on too many things
- Are your teams distributed?
Who Is the Transition Sponsor?

- If it’s from the top, you can do a lot
  - Restructure organization
  - Focus on right products
  - Mandate removing impediments to incremental business delivery

- If not, then must work within constraints you have
  - Create visibility
  - Demonstrate impact of upstream and downstream work
What Is Your Culture?

- Degree of discipline
- Desire for change
- Sense of team
- Ability to outlast “flavor of the month”
Types of Culture

- Collaboration
- Control
- Cultivation
- Competence

William Schneider, PhD. Why Good Management Ideas Fail – Understanding Your Corporate Culture
Net Objectives
Enterprise Transition Model

### Operational Architecture
- **Leadership**
  - Leader Engagement
  - Customer Engagement
- **Strategic**
  - Knowledge
  - Discipline
  - Communication
- **Tactical**
  - Infrastructure
  - Activity
  - Results

### Social Architecture
- **Leadership**
  - Improvement Targets
  - Cross-organizational Impact
  - Business Value Cycle
- **Strategic**
  - Standards and Technical Discipline
  - Architectural Integrity
  - Portfolio Planning and Tracking
- **Tactical**
  - Controls
  - Metrics
  - Practices

**Transition is a multi-dimensional journey**
Transformation Model - Phases

- Phase 1: Initiation
- Phase 2: Pilots
- Phase 3: Rollout
- Phase 4: Adoption

Enterprise Transformation Phases
## Transition Roadmap

<table>
<thead>
<tr>
<th>In this stage...</th>
<th>You do this...</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Initiation</strong></td>
<td>Introduction, Assessment, Baseline (current state), Opportunity, Transition (roadmap)</td>
</tr>
<tr>
<td><strong>Pilots</strong></td>
<td>Learning opportunity: Organizational, Lean-Agile, Social &amp; Operational behaviors, Initial implementations, Initial Lean-Agile Framework</td>
</tr>
<tr>
<td><strong>Rollout</strong></td>
<td>Expand implementations – multiple projects, teams, and project dynamics; Expand Lean-Agile Framework</td>
</tr>
<tr>
<td><strong>Flow</strong></td>
<td>Minimize delays, bottlenecks, and expand stakeholders across entire value stream;</td>
</tr>
<tr>
<td><strong>Continuous Incremental</strong></td>
<td>Continual, Release-able business planning &amp; prioritization across the portfolio</td>
</tr>
</tbody>
</table>
Too much change brings stress

Why not start where you are?
TELLING PEOPLE “JUST DO IT” JUST DOESN’T DO IT
transition is a process
ENDING -> NEUTRAL ZONE -> BEGINNING

SEE ➔ FEEL ➔ CHANGE
Where’s your Organization?

Initiation: Low resistance, high enthusiasm for change; must recognize realities of the current state

Pilot: Low resistance - decreases as “pilot” team adapts to Lean-Agile

Rollout: Organizations, People & Processes resist change; try to adapt Lean-Agile to existing environment

Adoption: Stakeholders embrace the innovative force unleashed; emphasize Lean-Agile improvement, team empowerment and maximization of benefits
Overloading Factors

• Nice to say “teams only accept what they can do”

• Nice to ignore technical debt

• But these are the realities the people in the transition will find themselves in.
Can one part of the organization help unload another?
If overworked teams is the challenge: Product Portfolio Management
Starting at the Team

• Understand why you are doing a pilot
• Pick the right method
“75% of organizations using Scrum will not succeed in getting the benefits that they hope for from it.”

Ken Schwaber
While we agree with the number, we disagree with the why.
Consider

- Most organizations undertaking an Agile transition are:
  - Successful
  - Over-worked
- Means a big jump may not be viable
Which Would You Rather Have?

For what?
  To own?
  To win on a game show?
  To drive in a race?
  On sand dunes?
Reasons for a Pilot

• Understand Agile
• Prove org can do Agile
• Discover issues of Agile across organization
• Learn how to do Agile at a team level
Legacy Organization: Matrix Resources to Projects

- Project 1
- Project 2
- Project 3
- Project 4
- Project N
Let’s Create a Pilot Project

Cross-functional, co-located teams produce 3x the results than before without changing process.
Two different approaches

1. Do this until you understand (requires new roles and methods).

2. Do what you are doing now until you understand how things are working (follow principles you understand)
Two Approaches

Scrum – Often Abrupt
- Create cross-functional teams
- Work in time boxes
- XFTs do load balancing for you
- Time boxes limit WIP

Kanban – Can Control Rate
- Create visibility
- Limit WIP
- Manage flow
- Be explicit
- Improve collaboratively
- Focus on value-centric pieces being done as quickly as possible
Creates Different Challenges

**Scrum**
- Creating teams may be
  - Difficult
  - Financially unviable
- Often requires isolation of pilot projects to work
- Does not directly address areas outside of development team

**Kanban**
- Requires discipline and motivation to work*

* Can be alleviated with Quick-Start Kanban™
Advantages / Disadvantages

Scrum - Advantages
- Easy way to start for small orgs
- Provides discipline often needed
- Sometimes people like to be told what to do

Kanban - Advantages
- Can apply anywhere
- Takes advantage of what organization already knows
- Based on Lean, easier to extend

Scrum - Disadvantages
- Changes may be too much for team
- Does not scale – need more
- May not address your real problem
- Tends to plateau

Kanban - Disadvantages
- Requires discipline and motivation to work
- Will still need Lean to scale for very large organizations
Trim Tabs and Pickup Sticks

CALL ME TRIMTAB
BUCKY

R. BUCKMINSTER FULLER
"CALL ME TRIMTAB"
JULY 12, 1895 — JULY 1, 1983
MARRIED JULY 12, 1917

ANNE HEWLETT FULLER
JANUARY 9, 1896 — JULY 3, 1983
Why Scaling Doesn’t Work

1. Starts at team level
   May not be your problem. Providing customer and business value is #1.

2. Incomplete focus
   What works at the team level is not what is needed at management and business level.

3. Lacks common vision
   Need a common vision across the entire organization; development team’s view does not provide this.
What Virtually All Transitions Should Include
Basic understanding of principles of Lean flow

Be inclusive of management
Practices that Are Virtually Always Useful

- Acceptance Test-Driven Development
- Explicit policies
- Managing work-in-progress (WIP)
- Attending to the entire value stream
- If Agile is being done on only one part of the value stream, create visibility to other areas
- Minimal Marketable Features (MMFs)
What to Do

• See where you are
• Understand what you are
• Take advantage of prior knowledge (patterns of adoption elsewhere)
• Create a roadmap
• Start at appropriate place
• Don’t look just where the light is better
Thank You!
Questions?
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