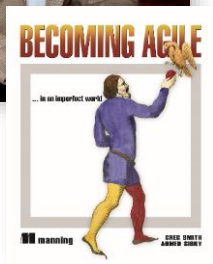




Pivoting to Agile: What You Won't Read in a Book



Greg Smith, Agile Coach/Trainer

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- Certified Scrum Master
- Certified Scrum Product Owner
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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)

Per digital.ai 15th Annual State of Agile Survey

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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



Per digital.ai 15th Annual State of Agile Survey

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How Can You Get Value Without Pain?



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Three Ways to Remove the Pain

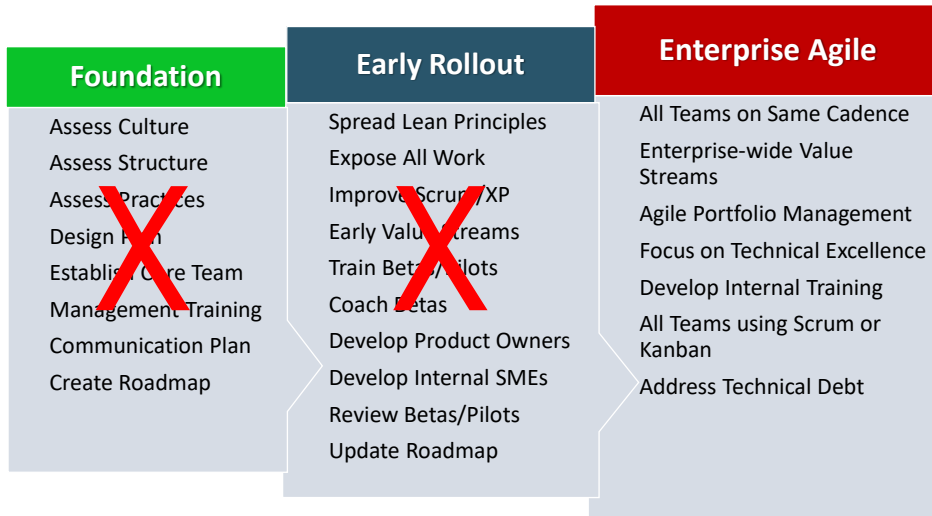
1. Stop Cheating
2. Customize to your Environment
3. Motivate the People



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Suggestion 1: Stop Cheating



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Typical Foundation Activities

ESTABLISH AGILE FOUNDATION				
Layout a foundation for immediate and long-term support of an Agile Mindset, Culture, and Practices				
Priority	Work Item	Description	Owner	Target Date
C	Define Success	How will we be able to tell if Agile made things better? Are there existing KPIs/Success Factors measured today?		
C	Establish Agile Core Team	Group of 5 to 7 responsible for helping MSS move to Agile Culture and Practices. Meet frequently to sustain Agile.		
C	Assess Existing Projects and Practices	Review practices being used for fit and value. Understand how existing structures support projects and maintenance.		
C	Assess maturity of teams (personal and technical).	Can team members self-direct? Are they seasoned software professionals?		
C	Design First Pass at Agile Framework	Which practices to use across MSS. A master list; each project team will use a subset. Include project management and software development practices.		
C	Create risk management plan	Classic waterfall risk management brainstorming session on risks to rolling out Agile/Lean.		
C	Formally identify Agile Executive Sponsor	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.)		
H	Agile Fundamentals for Managers and Executives	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.		
H	Create Cheat Sheets for Roles and Teams	Nice to have aids that support key points from training.		
H	Create awareness with business and vendor partners	We will need some level of support or delegation from the folks we are building solutions for.		
H	Create communication plan	How to keep Agile in from of the department. Awareness: Buy In: Ownership		

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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

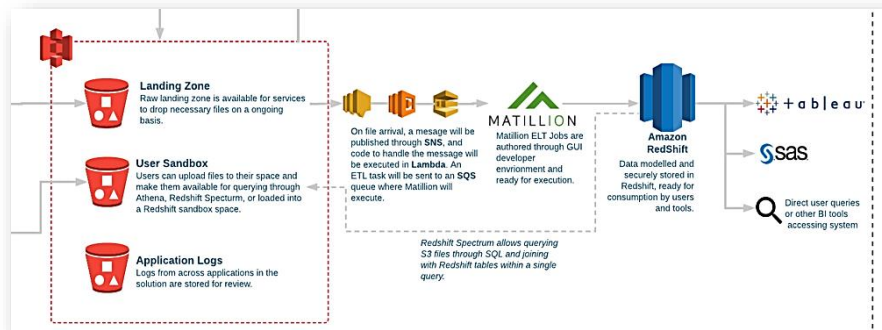
PILOTING AND VALIDATION				
Validate our assumptions about using Agile at MSS. Refine the roadmap and framework based on discoveries.				
Priority	Work Item	Description	Owner	Target Date
C	Identify pilot teams	Projects that allow us to validate Agile quickly.		
C	One on one coaching/training with Scrum Masters and Product Owners	Two key roles. We can do more than the pilot team members if we want to prepare future SMs and POs.		
H	Train pilot teams on Agile and their frameworks	This is not listed as critical but would not skip it unless there was a major impediment to training.		
C	Coach and support pilot teams	Coaching during key moments such as story writing and sprint planning.		
C	Review pilots	Fill out change-of-address card with post office		
C	Update Framework	Update practices to use list. Teams may show they are ready for more or ready for less.		
C	Update Roadmap	Items will be discovered that we have not accounted for in our transformation plan.		
H	Identify Agile practices that can be used for any project.	Part of updating the roadmap.		
H	Identify workstreams where Kanban is a better fit	Maintenance queues and other areas may be exposed that model better to Kanban (note Kanban can still be considered part of an Agile lifecycle.		

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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.				
Priority	Work Item	Description	Owner	Target Date
C	Make all work transparent	We can only manage what we can see.		
H	Train Business Partners	If they are ready we should, even if just a subset. Training will be only what they need to know.		
C	Review Intake Process	Can be part of the portfolio work. See if the intake process can be improved.		
C	Agile/Lean Portfolio Management for Product Steering Committee	Establish project workflow that maps to team capacity. Pull projects into team versus push. Prioritize projects. Expose all projects.		
C	Address dedicated teams vs. maintenance needs	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.		
H	Better Environment and Structure Support	Team rooms? Dedicated teams? (to product, business area, or other)		
H	Create internal training system.	Can supplement in person training when new hires or contractors come in. Greg can help the training team if there is one.		
H	Establish Agile Specific Practice SMEs	Internal gurus to coach other. Experts in story writing, story point estimation, TDD, etc.		

Suggestion 2: Tailor and Customize



100% Failure Rate

	Monday	Tuesday	Wednesday	Thursday	Friday
Week 1: > Sprint Planning > Start Sprint	8:30 AM: Sprint Planning Big Picture Review Sprint Goals Planning Commit or Adjust	<u>Build/Test/Accept</u> Write test cases Write Code Accept Stories Daily Standup Code Reviews/Refactor Refine Future Stories	<u>Build/Test/Accept</u> Write test cases Write Code Accept Stories Daily Standup Code Reviews/Refactor Refine Future Stories	<u>Build/Test/Accept</u> Write test cases Write Code Accept Stories Daily Standup Code Reviews/Refactor Refine Future Stories Team Refinement Meeting 9 AM 	<u>Build/Test/Accept</u> Write test cases Write Code Accept Stories Daily Standup Code Reviews/Refactor Refine Future Stories
Week 2: > Build > Test > Accept > Complete	<u>Build/Test/Accept</u> Write test cases Write Code Accept Stories Daily Standup Code Reviews/Refactor Refine Future Stories	<u>Build/Test/Accept</u> Write test cases Write Code Accept Stories Daily Standup Code Reviews/Refactor Refine Future Stories	<u>Build/Test/Accept</u> Write test cases Write Code Accept Stories Daily Standup Code Reviews/Refactor Refine Future Stories	<u>Build/Test/Accept</u> Write test cases Write Code Accept Stories Daily Standup Code Reviews/Refactor Refine Future Stories Team Refinement Meeting 9 AM 	<u>Sprint Wrap-Up</u> Stabilize code Finish off bugs Complete documentation Review Definition of Done 11:00 AM: Demo/Sprint review 11:30 AM: Retrospective

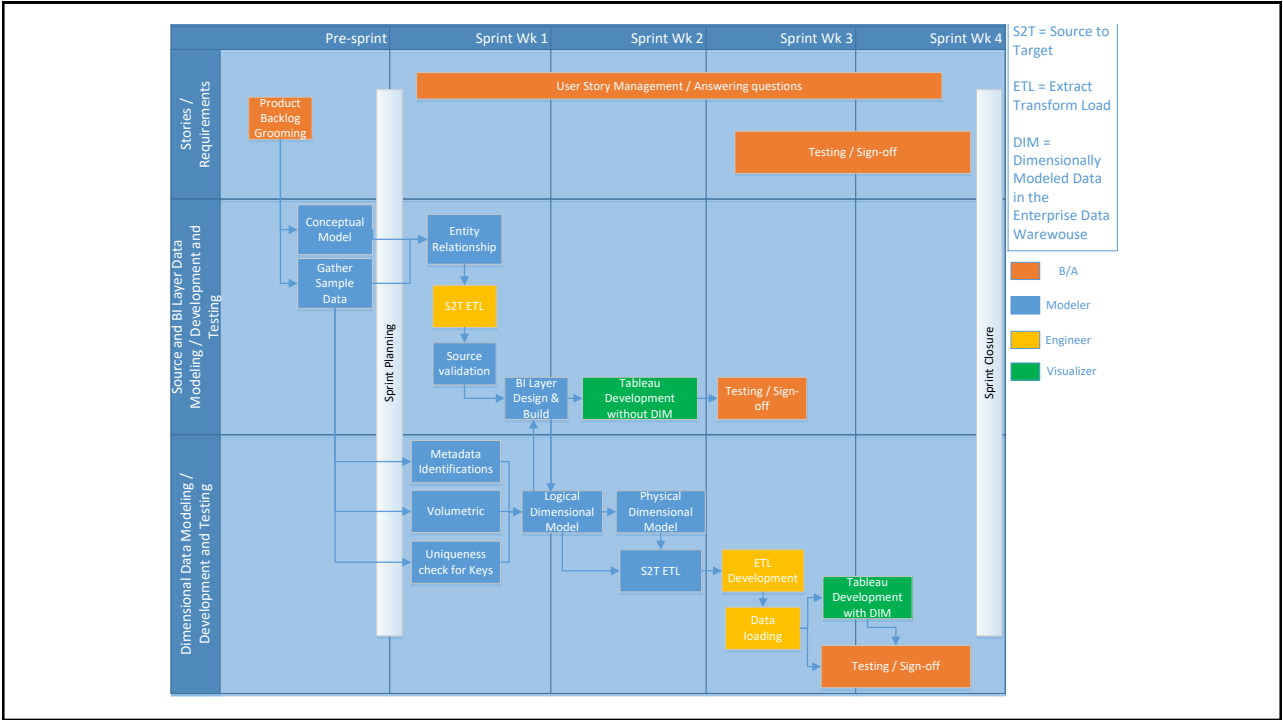
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Quick Review of the Main Sprint Goal

A sprint is a time-boxed event that delivers a subset of production-ready software.



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90% Plus Success Rate

	Day 1	Day 2	Day 3	Day 4	Day 5
Week 1 ➤ Sprint Planning ➤ Start Sprint	Sprint Planning • P.O. reviews stories with team • Stories researched • High level designs • Stories tasked • Team commits	Sprint Planning (If Needed) • Continue items from day 1	CONSTRUCTION • Sourcing/Data Analysis • Modeling • Mapping/ETL Work • Visualization • Testing • Acceptance	CONSTRUCTION • Sourcing/Data Analysis • Modeling • Mapping/ETL Work • Visualization • Testing • Acceptance	CONSTRUCTION • Sourcing/Data Analysis • Modeling • Mapping/ETL Work • Visualization • Testing • Acceptance
Week 2 ➤ Build ➤ Test ➤ Accept	CONSTRUCTION • Sourcing/Data Analysis • Modeling • Mapping/ETL Work • Visualization • Testing • Acceptance	CONSTRUCTION • Sourcing/Data Analysis • Modeling • Mapping/ETL Work • Visualization • Testing • Acceptance	CONSTRUCTION • Sourcing/Data Analysis • Modeling • Mapping/ETL Work • Visualization • Testing • Acceptance	CONSTRUCTION • Sourcing/Data Analysis • Modeling • Mapping/ETL Work • Visualization • Testing • Acceptance	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	CONSTRUCTION • Sourcing/Data Analysis • Modeling • Mapping/ETL Work • Visualization • Testing • Acceptance	CONSTRUCTION • Sourcing/Data Analysis • Modeling • Mapping/ETL Work • Visualization • Testing • Acceptance	Team Grooming Meeting (1-2hr) • Teams continues with Modeling Mapping/ETL Work Visualization Testing Acceptance	CONSTRUCTION • Sourcing/Data Analysis • Modeling • Mapping/ETL Work • Visualization • Testing • Acceptance
Week 4 ➤ Finalize Demo ➤ Learn	CONSTRUCTION • Sourcing/Data Analysis • Modeling • Mapping/ETL Work • Visualization	STABILIZE • No new stories to testing • Finalize stories in flight • Standups still occur	STABILIZE • No new stories to testing • Finalize stories in flight • Standups still occur	Next Sprint Grooming/Prep/Early Modeling 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

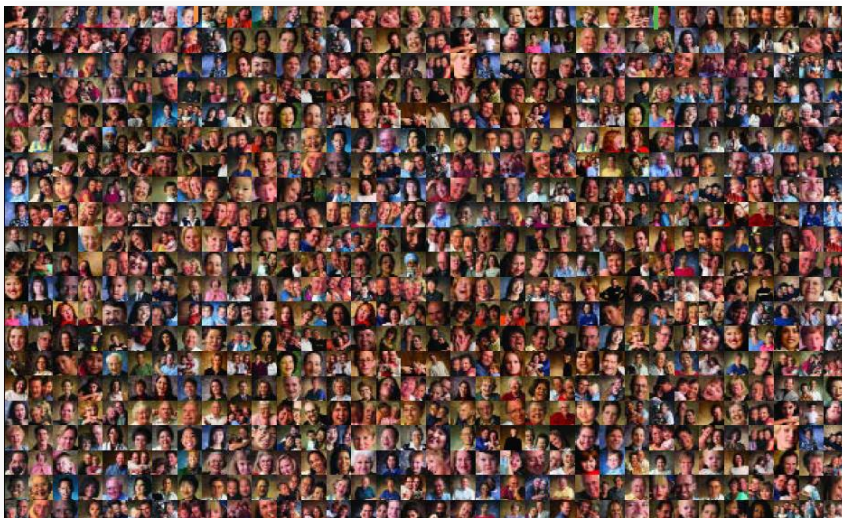
Suggestion 3: Motivate



Courtesy of Rocky

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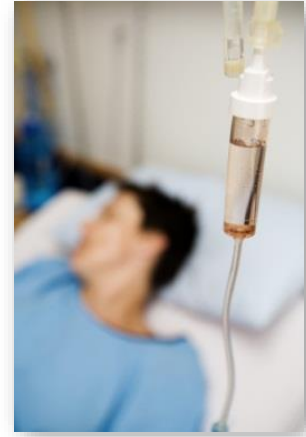
What If You Could Save 100,000 Lives?



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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?*

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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.

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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



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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."

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18 Months Later... Results!

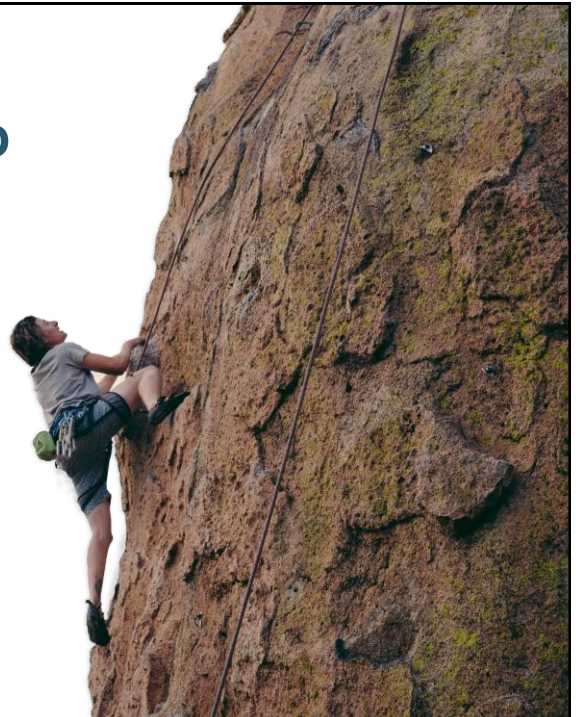
- 122,300 saved lives
- Thousands of hospitals were convinced to change

Practice	No. of Participating Hospitals [†]	Other Major Organizations Promoting/Mandating Practice [‡]	Strength of Evidence [§]
Rapid Response Teams	1,781	None	Relatively Weak
Medication Reconciliation	2,185	JCAHO	Weak-Medium
Prevent Central Line Infections	1,925	JCAHO	Strong
Prevent Surgical Site Infections	2,133	JCAHO, CMS	Strong
Prevent Ventilator-Associated Pneumonia	1,982	JCAHO, CMS	Strong
Evidence-Based Care for Myocardial Infarction	2,288	JCAHO, CMS, NQF	Strong

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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



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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?

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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

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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?



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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



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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



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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



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Questions?

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