Agile Boston is a lively user community focused on advancing the spread of Agile knowledge and applied practices in the Greater Boston area.

Agile Boston's Vision is simple: *A regional community of practice, in the Boston area, that is a thriving ecosystem of Agile learning, continuous improvement and innovation, in service to building energized organizations that create great results.*

Our **Core Values** explain, inform and guide everything we do, and are built on the core ideas of **RESPECT FOR PEOPLE** and **CONTINUOUS IMPROVEMENT**.

READY FOR AGILE CHECKLIST:

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OPENING NOTES:

- In Agile work, **people** power all the improvement and also all of the impediments. We must therefore set the stage for success, by getting clear agreements about essential topics such as word definitions and rules. Without these essential agreements, we are inviting trouble almost immediately.

- Your Agile pilots worked in large part because **willing teams** were selected. Do not forget this. Keep this firmly in mind as you try to "scale Agile." You cannot scale the success of a pilot unless you are working with Teams that demonstrate the same level of enthusiasm as your original pilot teams. The challenge is how to create enthusiasm for change, so that the maximum number of Team, Stakeholders and Executives are willing to play along in an active way.

- People are flexible and do change their minds. If a person is resistant to change they may reconsider after a while, so do not give up on them.

- In all cases endeavor to work with WILLING PEOPLE at every level in the organization. The willing people power almost all of the **improvement**, while the unwilling people power almost all the **impediments**.

❏ **STEP #1: SOCIALIZE & GET AGREEMENT ON KEY DEFINITIONS (AGILE, SCRUM, KANBAN)**

NOTES:

- **Agreements about word definitions are key agreements in Agile work.** By testing the organization's willingness to agree to word definitions, you can learn a lot about context, org-level readiness to proceed, etc.

- **It is common for the more resistant people to have objections to agreeing on simple word definitions.** Thus asking for agreement on word definitions for Agile, Scrum and Kanban generates "big data" that is useful for the coach, the in-house Agile champion, etc.

- **This step might look easy, however be prepared for real resistance, which is <u>much</u> more common than you might think.** For example, if executives are unwilling to allow the time

needed for everyone to do this together, you can (clearly) expect trouble with your Agile effort in that company (see also LEADERSHIP PREPARATION below.)

Part A: Agree on a Shared Definition of Agile

❑   For all affected **Teams**: socialize the Agile Manifesto as the definition of the word "Agile." Get clear and explicit agreement.

❑   For all affected (in-scope) **Stakeholders**: socialize the Agile Manifesto as the definition of the word "Agile." Get clear and explicit agreement.

❑   For affected (in-scope) **Executives**: socialize the Agile Manifesto as the definition of the word "Agile." Get clear and explicit agreement.

Part B: Agree on a Shared Definition of Scrum

❑   For all affected **Teams**: socialize the Scrum Guide as the definition of the word "Scrum." Get clear and explicit agreement.

❑   For all affected (in-scope) **Stakeholders**: socialize the Scrum Guide as the definition of the word "Scrum." Get clear and explicit agreement.

❑   For affected (in-scope) **Executives**: socialize the Scrum Guide as the definition of the word "Scrum." Get clear and explicit agreement. (See also STEP #3: LEADERSHIP PREP)

Part C: Agree on a Shared Definition of Kanban

❑   For all affected **Teams**: socialize the KANBAN book from David Andersen as the definition of the word "Kanban." Get clear and explicit agreement.

❑   For all affected (in-scope) **Stakeholders**: socialize the KANBAN book from David Andersen as the definition of the word "Kanban." Get clear and explicit agreement.

❑   For affected (in-scope) **Executives**: socialize the KANBAN book from David Andersen as the definition of the word "Kanban." Get clear and explicit agreement. (See also STEP #3: LEADERSHIP PREP)

❑   **STEP #2: DISCUSS & AGREE ON HOW THESE RULES OF AGILE, SCRUM & KANBAN WILL IMPACT BEHAVIORS, MINDSET & COLLABORATION**

NOTES:
- For each group (Teams, Stakeholders, and Execs) this step can be done immediately after agreeing to each definition socialized to each group. That is, during the same meeting, ask everyone to *actually agree to not only to play by those rules, the rules found in the Agile Manifesto, the Scrum Guide, and the Kanban definition, but also understand how these rules impact behaviors and mindset, as well as distribute authority!*

- Not everyone is happy about the changes that Agile brings. Real Agile brings changes to who and how *decisions* get made. This is going to trigger **fear** for just about everyone. Go in with that assumption.

- It is a good idea (and more efficient) to get everyone (Teams, Stakeholders, and Execs) in one big room for 3 hours to hammer all of this out. But this is not always practical so use common sense. But get it done!

- It is important to design an experience with group exercises, to engage the people, to reduce worries, and (most importantly) to surface legitimate objections. Un-conference meeting formats (Open Space, Lean Coffee, etc.) work well for this!

- There will be objections. Objections exist at every level across the company. People invested in the status quo always want to keep it that way. When the objections surface, it is important to allow those objections to be freely and openly expressed in a facilitated-meeting context. Encourage and honor the open expression of objections. You must create the space for objections as the facilitator. The key question to pose to anyone objecting is: "what has to change to get you in?" Or, "what needs to be true in the future that is not true now, to get you in?"

- It is a good idea to create a simple one-page document that people can actually sign. When they sign it, they are agreeing (for "N" weeks or months, a limited time) to a) use these definitions, and b) be bound by what they say, and c) commit to do everything expected to support the Agile, the Scrum, the Kanban implemented by Teams in this organization.

- Naming a date when all of this is to be reconsidered and inspected is **always** an excellent idea. It reduces worries, and gets more people IN.

Part A: Agree to honor the 4 values and 12 principles of the Agile Manifesto and how they impact behaviors and authority

❑   For all **Teams**: agree to be bound by the rules contained in the definitions of Agile

❑   For all impacted **Stakeholders**: agree to be bound by the rules contained in the definitions of Agile

❑   For all impacted **Executives**: agree to be bound by the rules contained in the definitions of Agile

Part B: Agree to follow the Scrum Guide rules and how these rules will impact the decision making process and how teams and individuals work together

NOTES:

- This is where it gets sticky. Example: The Scrum Guide says "for the Product Owner to be successful, _everyone_ in the organization must respect his or her decisions" and "The Product owner is one person, not a committee."

- Expect pushback. ENCOURAGE pushback. If you do not get any pushback, do an exercise that helps to elicit some pushback. Scrum is very strict about a few things. Make sure everyone UNDERSTANDS THIS.

❏   For all **Teams**: agree to be bound by the rules contained in the Scrum Guide

❏   For all impacted **Stakeholders**: agree to be bound by the rules contained in Scrum Guide

❏   For all impacted **Executives**: agree to be bound by the rules contained in the Scrum Guide

Part C: Agree to honor "ALL" the rules of Kanban

NOTES:

- There are many false beliefs about the Kanban method. The Kanban method is not just a rows-and-columns depiction of the work. It also contains process rules, such as work-in-process limits, pulling work from state to state and defined Work Order Types.

- In the Kanban method, an item does not get worked on until and unless it belongs to a specific Work Order Type with a specific Cycle Time. Make SURE that everyone understands this.

❑   For all **Teams**: seek and obtain agreement to be bound by the rules contained in the definition of the Kanban Method

❑   For all impacted **Stakeholders**: seek and obtain agreement to be bound by the rules contained in the definition of the Kanban Method

❑   For all impacted **Executives**: seek and obtain agreement to be bound by the rules contained in the definition of the Kanban Method

STEP #3: PREPARE EXECUTIVE LEADERS FOR WHAT IS ABOUT TO HAPPEN, AND WHAT IS NOW FULLY EXPECTED OF THEM

NOTES:

- Everything hinges on leadership. You need agreement from the rank-and-file about the words Agile, Scrum, Kanban and also agreement on the rules for those items. Executive leaders must understand the definitions, agree to them, AND FOLLOW THROUGH, especially when it gets difficult. This work must begin **at the same time** as work with the Teams, and **preferably, well in advance** of your work with the Teams.

- You will observe and largest amount of fear from Leaders, and it makes sense when you think about it; they must agree to give up some authority but are still accountable for key results!

- Leaders need to understand that the entire organization will sense and respond to any directives and executive behaviors that are inconsistent or directly contrary to this new Agile approach.

- Leaders need to understand that departments and policies can and will change as a result of confronting reality with Agile. For example, value stream mapping identifies departments, roles, and policies that are reducing the flow of value to customers. Scrum encourages the identification and removal of impediments.

Kanban authorizes Teams to require that a Work Item Type is assigned to items that are queued for work. Leadership prep is ongoing and a **very big deal**.

- A very common pattern is "Agile is great for I.T." while the reality is that Agile immediately affects and makes demands upon the entire organization! Be prepared to push back on this misconception that executive leaders often hold as a belief.

- Just because the top executive wants Agile does not mean it is going to happen. People up and down the organization resist, including direct reports to the top leader. Make sure the top leader understands this. You don't want an "**Air Sandwich**" between the top leader and the teams executing Agility.

- Also make sure the top leader understands that it is not good enough for direct reports to merely comply; they must AGREE in fact to support with some enthusiasm.

❑   Explain to executive leaders the benefits of doing their leadership work in an Agile way, and how being public about that is a very good idea.

❑   Ask executive leaders to: work from a backlog, use a Kanban board, run a daily meeting, and/or do an end-of month demo to the organization. Offer to facilitate that. Try to get them to agree to do this.

❑   If they say NO, reduce the ask by half and try again.

❑   Explain to executive leaders the essential nature of very clear and very consistent messaging and communication about the change

❑   Explain to executive leaders the essential nature of very FREQUENT ("early and often") messaging and communication about the change

❑   Ask executive leaders to send out a weekly email that reports on and celebrates the wins that the Teams (and the organization) are achieving

❑   If they say NO, reduce the ask by half and try again.

❑   Test the willingness of individual executives to be led through learning by asking them to read a small portion of book you recommend, for example the book SOFTWARE IN 30 DAYS from Jeff and Ken. They will always say yes to the request but may not do the work. Provide a list of pages to read (about 40 or so) have them suggest a date when they can be done with the reading, and see if they actually do it.

❑   Explain to executive leaders the benefits of Agile are not lasting unless the people are genuinely engaged.

❑   Explain to executive leaders that substantially all the improvement comes from "individuals and interactions" and "motivated individuals" who are actively participating on self-managed (self organizing) teams.

❑   Explain that EMPLOYEE ENGAGEMENT IS ESSENTIAL! Encourage pushback and objections and then cite the Gallup data on the horrific costs associated with low employee engagement.

❑   Explain that self-management is where the improvement comes from, and that self-managed teams are impossible to achieve unless the Team members are engaged!

STEP #4: WORK IN ENTERPRISE ITERATIONS OF AGILE TRANSFORMATION, CREATING NATURAL BOUNDARIES OF INSPECTION & ADAPTATION

Phased-gate "waterfall style" implementation of Agile create the following disadvantages & problems:

- Transformation impacts people more than anything else in the organization. Everyone reacts differently to change; some

embrace it but most people fear it.   Depending on the culture in place, it is hard to predict when "real" transformation will take hold and produce better outcomes. Thus trying to plan up front and predict when these longer-term outcomes will occur is fruitless!

- Typically rigidly planned up front, the phased-gate approach gives the impression that change cannot happen once the decision is made to follow a specific transformation strategy. And worse, those who are impacted by these changes were not even give a seat at the planning table to begin with, leading to disengagement and ... poor results and even failure.

Enterprise iterations achieve the following advantages & solutions

- Each iteration has a clear goal and we know what "Done" looks like because it is measurable, not with vanity metrics by actionable metrics
- Creates natural boundaries for Experimentation, Inspection and Adaptation. When people believe that they can try something, learn from it and adapt it as needed, they are much more willing to be IN!
- The organization can react more rapidly to a BIG Opportunity if one arises instead of being stuck in the midst of a transformation that cannot react to change.
- Each iteration has a clear goal and we know what "Done" looks like because it is measurable, not with vanity metrics by actionable metrics!

Therefore, make sure these items are checked off before you begin:

❑   Agree to work in 45-60 day enterprise iterations. At the end of each iteration, invite everyone to review what happened during the past iteration and agree on what if any changes should be made. Again, an meeting format like an Open Space or World Café work great for such meetings.

❑   Be sure each enterprise iteration has at a minimum of one SMART (Specific, Measurable, Attainable, Relevant and Timely) Goal. It is best

for this goal to be set with those affected (almost everyone) participating. Various meeting formats and facilitation methods can be used to do this.

❑   Define Actionable Measurements to help you realize true progress towards achieving your SMART goal. Beware of "vanity metrics" that can mislead you on how far along your Agile transformation is! Example of a vanity metric: how many teams we trained, "stood up", etc.

CLOSING NOTES:

You might be doing a "reboot" or a "remake." If you are, simply follow these instructions. But first set the stage with a message about WHY we are taking these steps. If you can also time this "reboot" to happen at a time when other changes are taking place, so much the better. For example if the leadership team is changing in some way, THAT is a perfect time to introduce the "Agile reboot."

Also, one of our attendees asked this question in response to our preparation survey: "***How does a coach break through to a company when those leading in that company believe they have been doing everything in an Agile way but they are just slapping Agile labels on bad habits?***"

The simply answer is YOU DON'T! Telling people, especially leaders, that they are not doing something right immediately invokes fear and backlash. In fact, believe it or not, a coach is sometimes brought in to validate what has been done, and when they don't trouble follows.

Instead we have to remember why we are adopting Agility in the first place, to jump on easy opportunities to improve, maximize output, and manifest better (and measureable) outcomes. Therefore always think & speak in terms of outcomes: "are we achieving what we set out to achieve?"

Remember why does "Agile In Name Only (AINO)" sell?

- Everyone still has their job, no one is made uncomfortable, thus fear does not take over
- Leaders are happy with the 10-20% temporary improvement in productivity
- There is a beginning and an end, there is a thus a fixed cost and timeframe!

FOUR DOORS EXERCISE: THE QUESTIONS

Use this for "STEP #2: DISCUSS & AGREE ON HOW THESE RULES OF AGILE, SCRUM & KANBAN WILL IMPACT BEHAVIORS, MINDSET & COLLABORATION"

- What can I do now that I could not do before?
- What can I do now that I could do before?
- What can't I do now that I could do before?
- What can't I do now that I could not do before?