On the Way to Meeting a Mandate: Transitioning to Large Scale Agile

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• Survey the audience on their IT or Engineering department size.
• Where are they in the Agile adoption cycle?
About Cambia IT (in 2011)

- IT size is ~600 team members
- Contractor to FTE mix was 2:3
- New CIO, CTO in June
- Grassroots agile efforts
Silos with Architecture, Analysis, Application Development, Release and QA and Infrastructure
Teams Based on Projects

Each circle represents a person with a skill set:
- Developers
- Testers
- User Experience
- Business Analysts
- Product Management
- Specialists

Boxes represent project work
About Cambia IT (in September 2012)

- IT size still about ~600 team members
- Contractor to FTE mix was 2:8
- Cross-functional 36 Application Delivery agile teams
- Another 30 Infrastructure and Shared Services teams
• June 2011 – we re-organized into IT groups that were aligned with business units
• We decided to transition all of IT to use Agile as our primary SDLC process
• Goals still remained the same, but we hoped we can better realize them through this structural change in organization and SDLC
Part of the transition, we restructured teams in cross-functional agile team
• Work in the enterprise comes in many forms: Projects, Enhancement Requests, Break-Fix work.
• Each team maintains its own backlog containing any form of enterprise work.
• Work is pulled down by the team
• Agile Teams are organized cross-functionally.
• Best Practices Exchanges or Communities are organized across agile teams
• BPEs or Communities can have role or function specific focus
• Examples: Enterprise Transition Community, Agile BPE, Software Quality BPE, Agile Coaching Community, Agile Training Community, Product Owner Community.
• Resistance or fear of Change – we have always done it this way, we are afraid to change
• Jaded individuals who have seen these type of large scale efforts come and go
• Team Makeup – not all teams have the right skills
• Skepticism on agile method
• Lack of knowledge agile techniques
From patch work Agile adoption to an Enterprise wide rollout. Includes 600 IT members as well as another 300-400 affiliated team members from other business units.

Takeaway: Enterprise Transition Community (ETC) and Change Management

- Started with senior managers on ETC – didn’t work.
- ETC: community focused on leading the change
- The process is arduous and may be even be a multi-year effort
- Treat Agile transition as any other large scale change management effort
- Use change management models to understand what you are up against
- We referenced the Influencer and other change models
As technologists – we pay scant attention to the personal dimension of change
Motivation – will it be worth it?
Ability – can I do what is required
Both dimension have to be addressed at personal, social and structural level

Couple of examples on how we tapped into these influencer sources:
- Provided agile training programs. Provided internal agile coaches for ongoing support.
- Formed user communities, BPEs to harness peer pressure as well as find strength in numbers
- At structural level, asks teams to co-locate if possible (or at least co-locate for sprint planning, release planning activities)
Makeup of ETC and other BPEs has to be representative of various groups we are asking to transition. We gained more traction on the transition with various other non-IT business units, when we added ETC members from their ranks.
• ETC and other BPEs must eat their own “dog” food.
• ETC follows scrum
• We have daily scrums, demos with CIO staff and other senior management, conduct retrospectives, do release planning and create 4 quarters rolling roadmap
• Here is an actual velocity chart
Agile Enterprise Transition Community (ETC)
Sprint 11 (August 6 – 24)

Overall Status
- Activity
- Results

Highlights
- Quarterly planning formalization
- Initial collection of mission metrics
- Communication strategy
- Scrum master and product owner training held on Aug 11-18
- Rally SSO implementation
- Lateral visibility roadmap (not complete-reward)
- Evaluation for pilot efforts (onsite, JRP, project roadmap, RPM)
- Infrastructure training evaluation of initial teams
- IT cost estimation workflow proposal

Deliverable Summary
- 51 points, 102.25 hours - 80% accepted

<table>
<thead>
<tr>
<th>Stories</th>
<th>Owner</th>
<th>Status</th>
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<tbody>
<tr>
<td>Tools / Processes</td>
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<tr>
<td>Recruit new ETC members</td>
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<td>Identify proposed work &amp; owners for IT agile estimation</td>
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<td>Complete</td>
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<td>RPM phase for pilot group definition of quality implementation</td>
<td>SD</td>
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<td>Lateral visibility for IT – defining the roadmap</td>
<td>GM</td>
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<tr>
<td>Evaluate tools &amp; process pilot effort</td>
<td>OK</td>
<td>In process</td>
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<td>Requirements; compare agile vision document to scope and charter document</td>
<td>OK</td>
<td>Complete</td>
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<td>Tools</td>
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<tr>
<td>Team Health</td>
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<tr>
<td>Develop training aids for quarterly planning</td>
<td>DH</td>
<td>Complete</td>
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<tr>
<td>Quarterly planning determine enterprise-level interventions</td>
<td>DH</td>
<td>Complete</td>
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<tr>
<td>Quarterly planning conduct survey of POs</td>
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<td>Complete</td>
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<tr>
<td>Multi-project quarterly release planning</td>
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<tr>
<td>Develop collection process for IT mission metrics</td>
<td>SD</td>
<td>Complete</td>
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<tr>
<td>Infrastructure coaching evaluation for team</td>
<td>JD</td>
<td>Complete</td>
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<td>July heat map report to CLT</td>
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<tr>
<td>Training</td>
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<td>Scrum master and product owner training</td>
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<td>Communication</td>
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<tr>
<td>Communication strategy: Identify audience and needs</td>
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<td>Complete</td>
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Q3 Roadmap Status
- Processes At risk
- Tools At risk
- Team Health On track
- Communication At risk
- Training On track

Delegated to Other Teams
- Defect deliverables for Q3 roadmap
- Testing core team
- In process

2012 Q3: Adapt and Measure
• Team members are not dedicated and we poll for capacity every sprint
• Large challenge – one remedy could be that the organization can institute 20% flex
time like Google or 2 weeks Paid Time On like Salesforce.com, where individuals go
and spend part of their time on what Mike Cohn calls “Improvement
Communities”.
• Communities that are thriving are the ones where a core group of individuals are
committed
• Large scale transitions require training plans tailored to individuals and their roles.
• Tapping into Organizational Development function within HR group is recommended.
• Peer learning through Best Practices Communities is also powerful. This is a self-development opportunity for many. Also, these type of training is generally well-received as peers find it contextual, relevant and relatable.
Insisting on getting a PO from the business unit for every agile team was painful but very useful. The on-going conversation is allowing us catch issues faster. IT is able to push back on the business by insisting that they do prioritization. Allows business units to own the prioritization so they feel in control. Again, all the benefits you expect to achieve from this methodology.

The UAT folks took the opportunity to assign SMEs and testers to each of the teams. This allowed us to get better at defining uncovered requirements through building out better acceptance criteria.
Takeaway: “When Data Talks, Opinions Walk”

- Started with the “fractal unit of Agile” definition
  - Allowed us to see gaps
- Right-sizing the team: 5-9 team members
- Gaps in Product Owners and put an action plan to pursue that with the business
- Changed hiring practices to achieve a 1:4 QA to Development ratio

Team Scorecard – drove shoring up the team as a unit
Snapshot of Agile Team Composition Scorecard in March, 2012. Note the reds and yellows.
Snapshot of Agile Team Composition Scorecard in September, 2012. Note more greens, as the organization collectively created action plan to improve shortcomings.
Four categories of metrics.
Introduce your metrics iteratively if you can. This allows teams to digest the metrics and if they fall short, they are doing something about it. If you do too much, teams will be overwhelmed.
Mission Metrics

• Metrics to determine whether we are providing quality, on-time delivery
• Defined for each team
  • # of Releases
  • % of Releases that cause harm
  • % Rework
  • % Deployed on time
• On Budget definition still in progress
<table>
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<tr>
<th>Business Value</th>
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<tr>
<td>• Definition Phase</td>
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<td>• For now, not doing any ROI calculations</td>
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<tr>
<td>• Customer value – to be derived from customer satisfaction surveys</td>
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The Enterprise Transition Community’s focus, initially has been on forming agile teams and providing support. Moving forward, the concentration has been driving large scale agile into the enterprise. There are many practices that we have been introduced. However, it was beyond the scope of the current paper to talk about many of these activities. We hope to bring an update on this front next year.