Lean Change Approach to Disciplined Agile Transformation

Process Mentors

Begin Your Journey to an Agile Way of Working

www.ProcessMentors.com

Process Mentors Strategy

Lean Change Approach to Disciplined Agile Transformation

Agility Health Check / Assessment

Short assessment to understand the context and recommend candidate options for adoption roadmap.

What Good Looks Like

Identify the Vision for the success story, focusing on outcomes rather than vanity measures.

Foundational Training

Invest in your people, train your leadership and teams together on the foundations.

Just-In-Time Training & Coaching

Success assurance & accelerator, just-in-time training combined with coaching to actually do the work.

Measuring Success

Have we achieved success?

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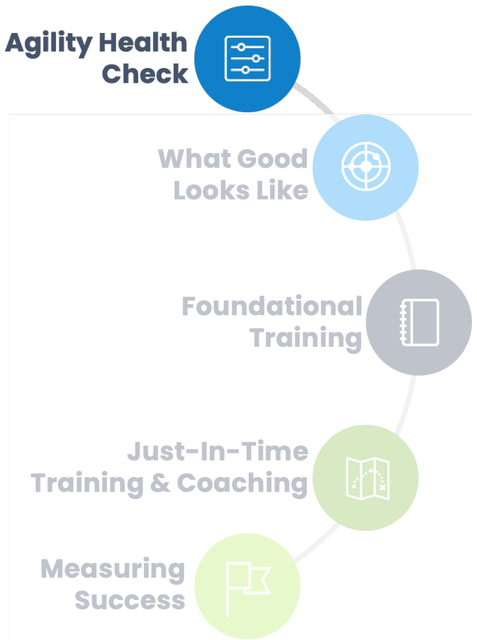

Agility Health Check / Assessment

Transitioning from a traditional approach? We conduct a **short duration assessment** to understand readiness to adopt an agile way of working.

Agile way of working is already in practice? We conduct an **agility health check** to set a baseline.

Assessment or agility health check, key information gathered includes: understand the current state, understand the culture, and understand the readiness for change. We pull from a large pool of assessment factors, ensuring they are valuable and fit for purpose of each organization's unique context.

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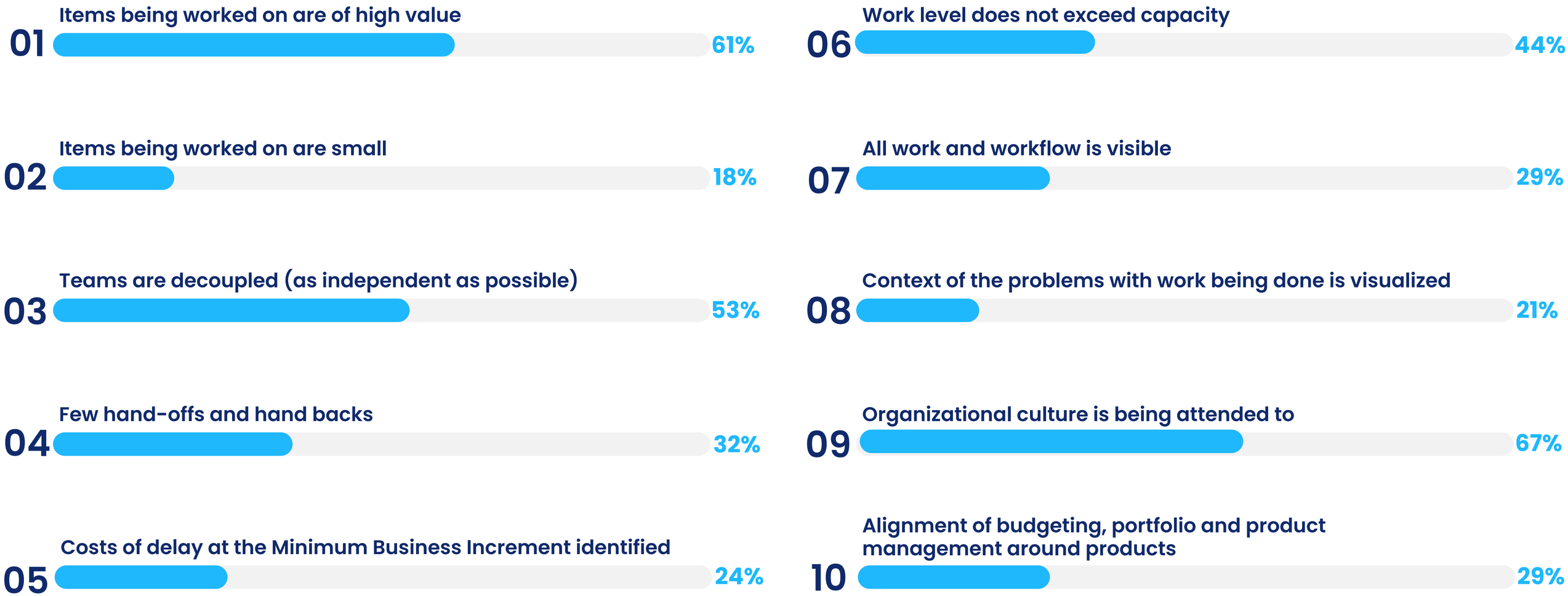
Agility Health Check / Assessment

Days – NOT Weeks or Months to Complete

Partial Sample Assessment Factors



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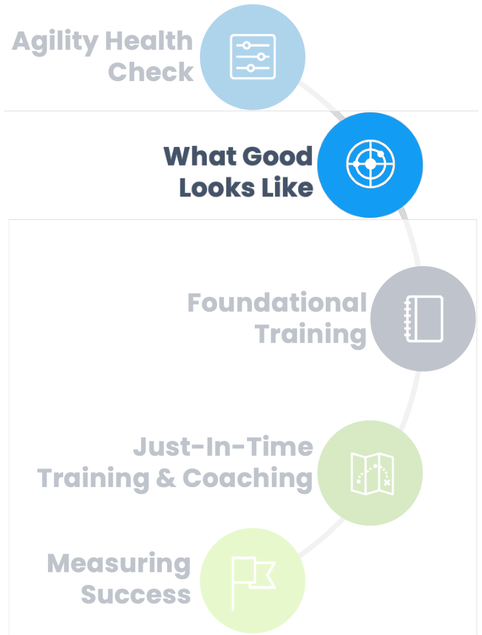

What Good Looks Like

We develop a **transformational roadmap** based on selected options and a vision for success. The focus is on outcomes rather than vanity measures. The roadmap centers on the definition of what good looks like and how it will be measured.

Business Value & Outcomes

Measure indicators that provide visibility into an increased probability of teams delivering meaningful business value. Small delivery increments, continuously adjusted to what is needed with the ability to change direction at low cost.

Mindset

Mindset and collective ownership are less visible yet much more powerful than tools and techniques or even practices. Becoming a learning organization is contingent on the change in the agile team members' mindset and everyone in the value stream.

Process Adoption

Organizational transformations are expensive. Measure that an agile way of working is being adopted vs. agile in name only. The goal is not to start all projects/initiatives as "agile" and claim success. It is to improve value delivery using lean and agile principles, practices, and techniques.

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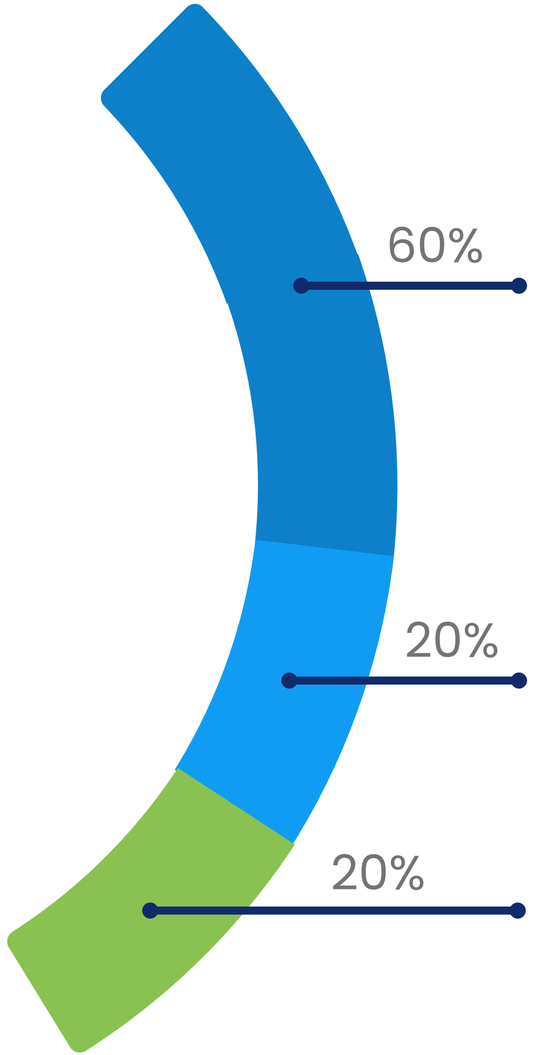
What Good Looks Like

Vision for Success



Business Value & Outcomes

Measure indicators that will show an increased probability of teams delivering meaningful business value.

Mindset

Mindset and value are less visible yet much more powerful compared to tools and techniques or even practices.

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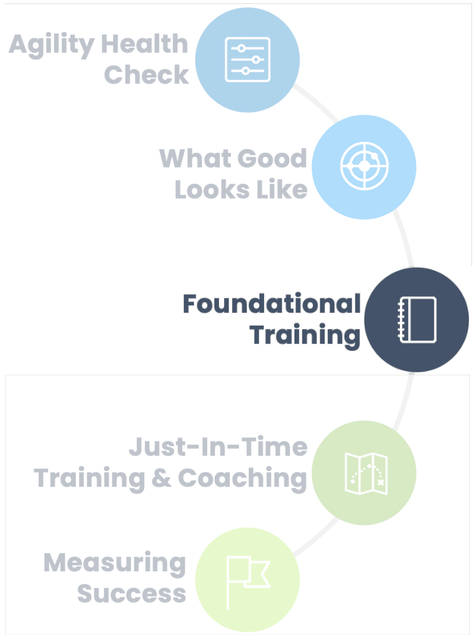

Foundational Training

Train **leadership**. Train the **team members together**. Train the **stakeholders** and subject matter experts. We develop a training plan with options for foundational context based on the role, team, or other aspects.

The training plan is a component of the transformation roadmap and overall strategy. **How much foundational training is needed?** What level provides the best value based on the role of attendees? Does everyone need to be certified by an external industry recognized governing body? Should only a subset of the organization earn an external certification?

Would the organization benefit from a certification that is configured to its specific context and goals? Is certification a consideration at all? These are all critical questions and choices required to achieve agility while balancing the cost required for the journey.

Options

There are multiple options for foundation training, the two most prevalent:

- Option 1 – approximately ½-day fundamentals
- Option 2 – 2-day certification course training

Both options are paired with Just-In-Time training & coaching for practices and techniques.

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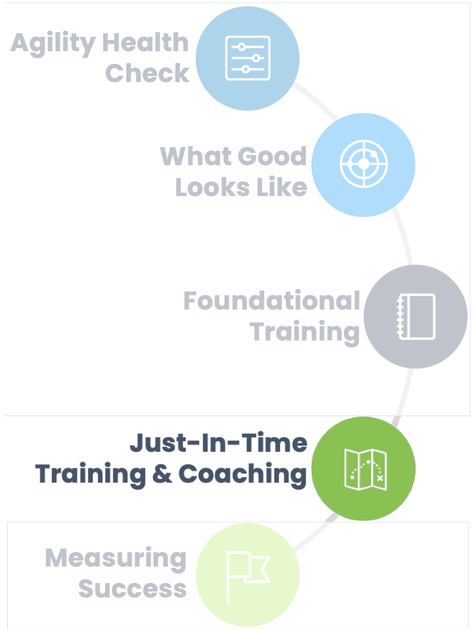

Just-In-Time Training & Coaching

The **right training**, at the **right time**, in the **right amount**. Our Just-In-Time approach is success assurance and acceleration. Once a team has chosen its way of working, this approach focuses on “Doing that Way of Working”.

Team’s using the Disciplined Agile tool kit choose their way of working by making decisions on the best fit practices and techniques for their specific context. After the right amount of foundational training, this strategy provides a high value to cost approach for execution.

Once that way of working is chosen, mini-trainings ranging from 20 minutes to 45 minutes in duration are delivered just before they will be coached to use that practice. This is a very powerful approach that eliminates waste in the learning process.

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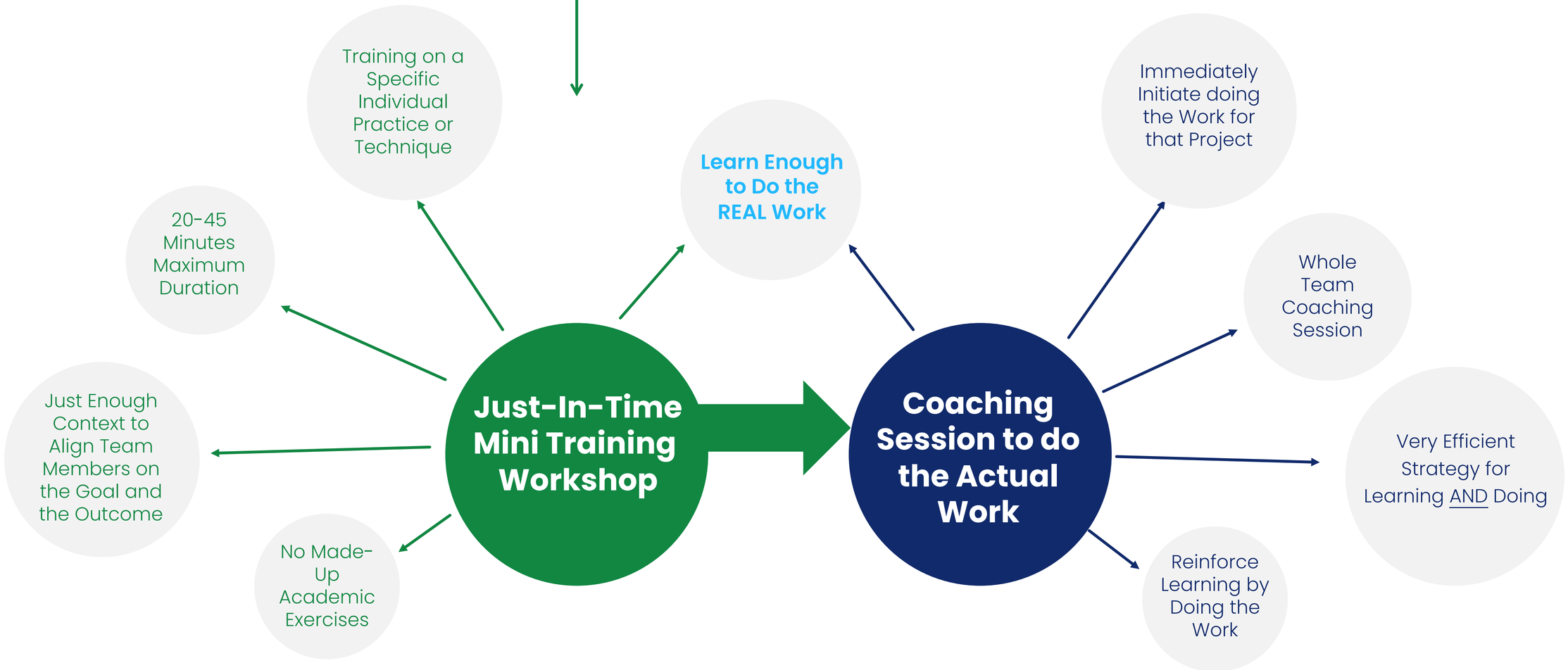
Just-In-Time Training & Coaching

Each Mini-Training Session is Coupled with Coaching to Do The Actual Work

Team #1

Foundational Training (1/2 day)	**Inception Phase** Just-In-Time Training (20-45 min increments) & Coaching (2-4 Weeks)	**Construction Phase** Just-In-Time Training (20-45 min increments) & Coaching (4-6 Weeks)



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Just-In-Time Training

Sample Mini-Training Sessions Delivered Throughout Inception

Inception Phase
Just-In-Time Training
(20-45 min increments)
& Coaching (2-4 Weeks)

Just-In-Time Mini-Training Session
#-minutes

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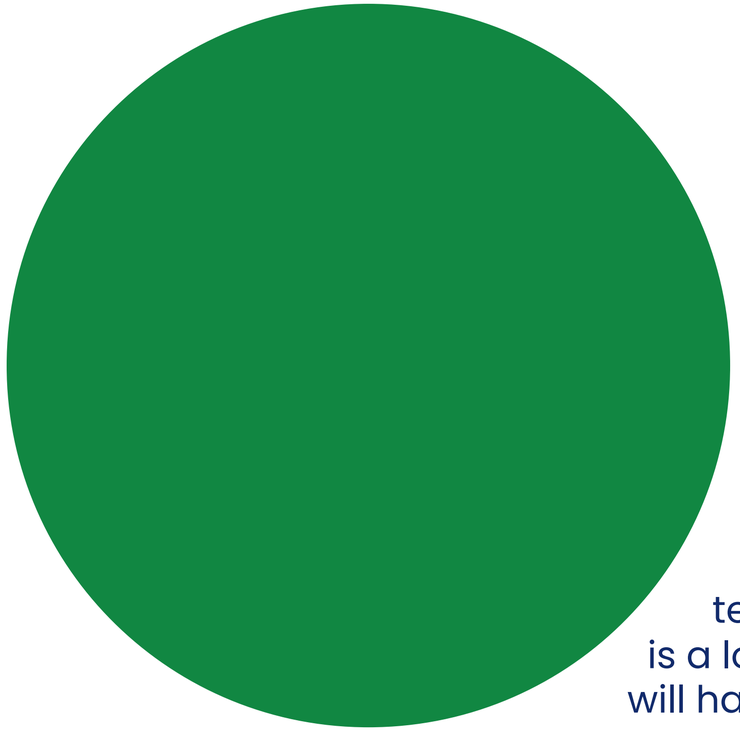
Just-In-Time vs. Big Bang Training

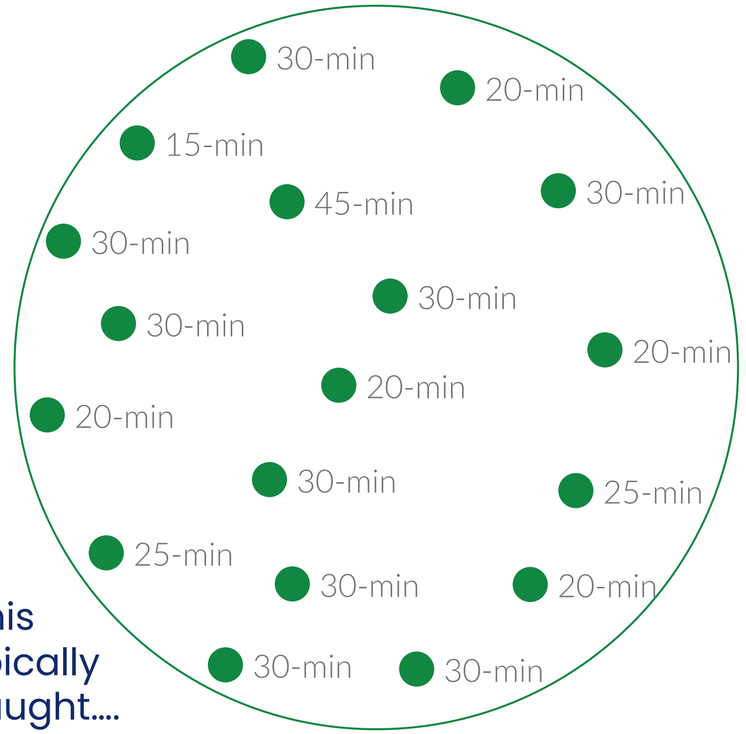
Both have their place and value



8 Hours Training in a Single Day

For Teams to <u>do</u> a practice, which approach do <u>YOU</u> think is more efficient?

The practices trained in the single 8-hour day would be put into use by the team over the 4 week period. This is a long period after which they typically will have forgot much of what was taught....



8 Hours Training Spread Over 4 weeks

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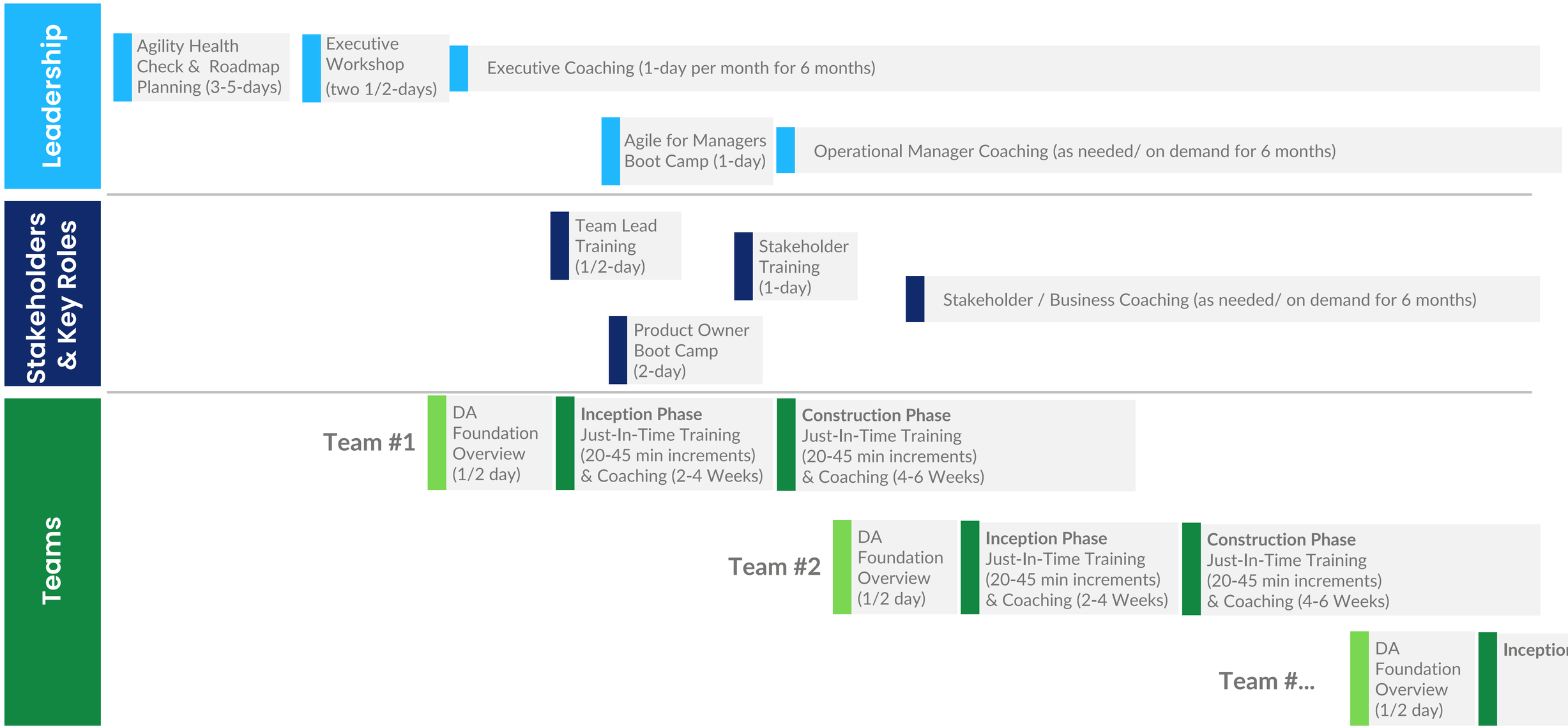
Option 1 Sample DA Transformation Roadmap

Foundational & Just-In-Time Training – Focus is on Doing vs. Certifying



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Targeted Training Followed by Certification

Foundational & Practice Specific Training @ Ideal Time – Certification Follows

Team #1

DA Foundation Overview (1/2 day)

Inception Phase
Just-In-Time Training (20-45 min increments) & Coaching (2-4 Weeks)

Construction Phase
Just-In-Time Training (20-45 min increments) & Coaching (4-6 Weeks)

Time Passes

PMI DA Certification Training (2-4 days)

DA Foundation Overview (1/2-day)

Foundation training for the whole team on Disciplined Agile. This includes key differentiators such as Lifecycle options, process goals, roles, and choosing your way of working as a team.

In this adoption roadmap, certification is not an upfront activity for all team members prior to using Disciplined Agile.

Not everyone may need to be certified, this will be based on the goals and culture of a given organization.

Professional Certifications are valuable, we can provide context on how they can be part of an adoption roadmap and in which scenarios...

PMI Disciplined Agile Scrum Master Certification (2-days)

PMI Disciplined Agile Senior Scrum Master Certification (2-days)

PMI Disciplined Agile Coach Certification (2-days)

As an option, organization selects roles and/or individuals that they want to have PMI Disciplined Agile Certified. PMI has options for professional certification with differing entry points based on existing experience and other industry certification(s).

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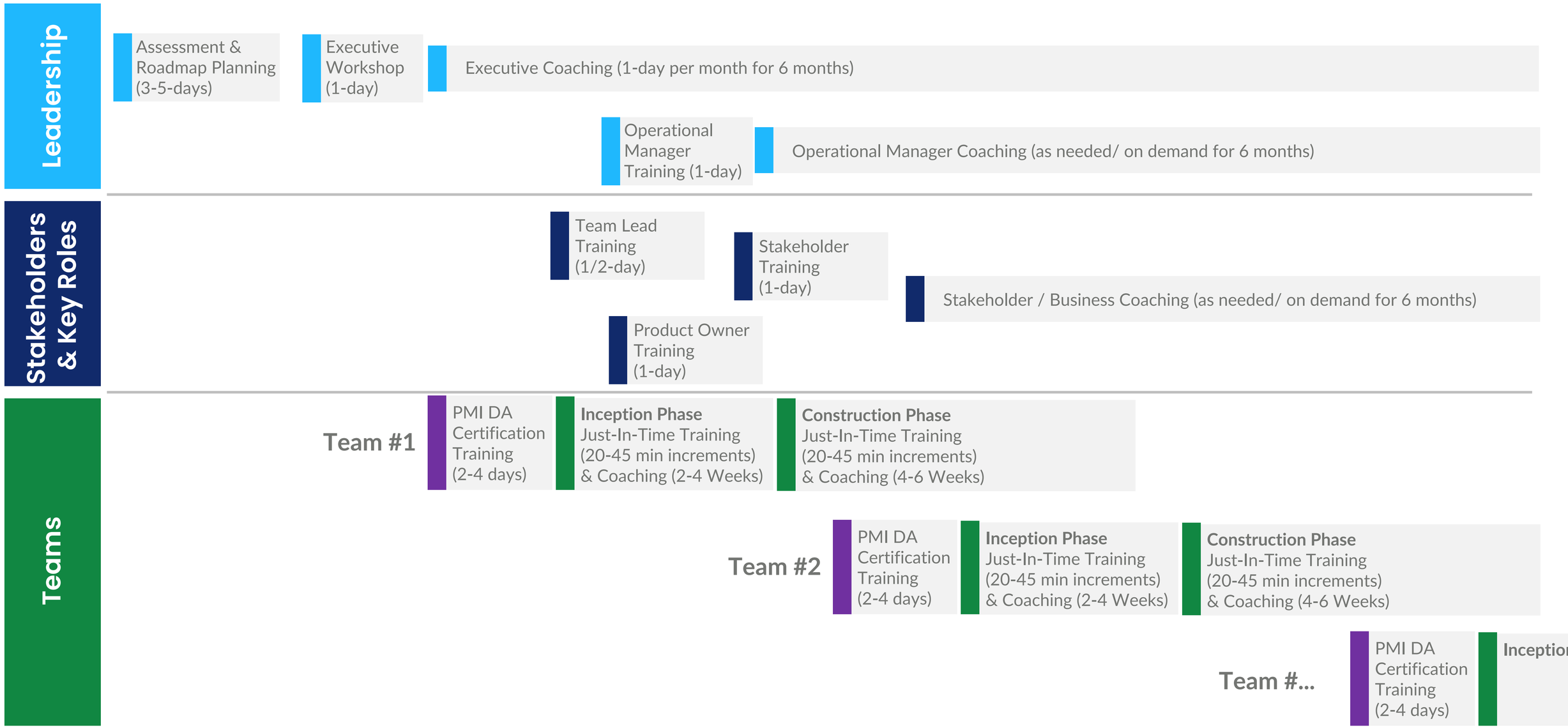
Option 2 Sample DA Transformation Roadmap

Foundational Training and Certification Upfront Followed by Just-In-Time Practice Training



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Foundational Training & Certification Upfront

PMI Disciplined Agile Certification Training Workshops

Team #1

PMI DA Certification Training (2 days)

Inception Phase
Just-In-Time Training (20-45 min increments) & Coaching (2-4 Weeks)

Construction Phase
Just-In-Time Training (20-45 min increments) & Coaching (4-6 Weeks)

Options for PMI Disciplined Agile Certification based on existing experience and industry certifications

PMI DASM
Disciplined Agile Scrum Master (2-days)

Fundamentals of the Disciplined Agile tool kit and how to choose your way of working.

PMI DASSM
Disciplined Agile Senior Scrum Master (2-days)

For the initiatives that are more complex, the Senior team leads learn how to scale and tailor the way of working.

PMI DAC
Disciplined Agile Coach (2-days)

Agile Center of Excellence (CoE) staff benefit from learning how to apply and optimize Disciplined Agile within and between teams.

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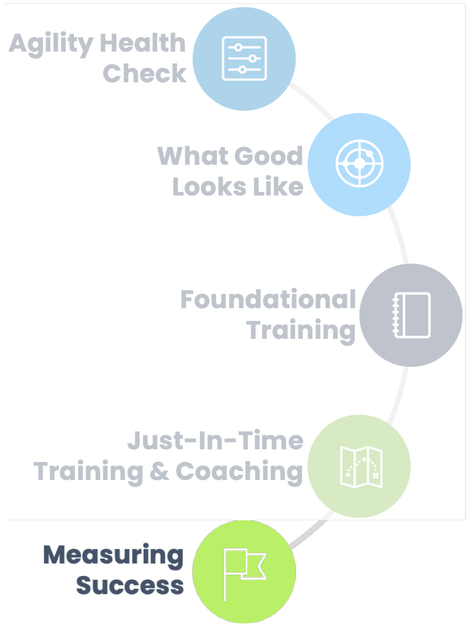

Measuring Success

The goal should never be to "be agile"; it should be to achieve business agility and become a learning organization. Our approach for measuring success in transitioning to an agile way of working focuses on three categories with weighting applied to them. As a starting point, we would weight the success measures: 60% Outcomes, 20% Mindset, and 20% Process Adoption.

Based on the measurement options chosen to **define what good looks like**, success is measured. The first 30 days of adopting an agile way of working set a solid platform to build on. Measures here center on impediments that must be swiftly removed.

The following 60 days **focus on if a shift in mindset is happening** and is progress on the adoption aspect. As teams get into this 60 day period, we also measure the increased probability of the value delivery. Is working functionality meeting a definition of done? Is there a high level of collaboration with Stakeholders? Is feedback being incorporated?

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Adoption Strategy Summary

Process Mentors Lean Change Approach

Continuously Make Improvements

Agree to what good looks like and measure outcomes. Use Kaizen Loops to continuously experiment with options for improvement.

Measure Success

The goal should never be to “be agile”; it should be to achieve business agility and become a learning organization.

Do the Work with Coaching Support

Immediately following a mini just-in-time training session, Team Members use a practice or technique to do the work required to deliver value. Coaching support provides success assurance.

Train each Individual Practice/Technique

Utilize a truly just-in-time training approach to provide just enough context for teams to use a practice or technique.

Train the Foundations

Train the organization on the foundations. This includes leadership, operational management, business stakeholders and the Agile Team members. For some roles, this will also include becoming certified.