SUMMARY

Kim, Behr & Spafford's

THE PHOENIX PROJECT

A Novel about IT, DevOps, and Helping Your Business Win

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Kim, Behr & Spafford's

The Phoenix Project

A Novel about IT, DevOps, and Helping Your Business Win

Summary by Ant Hive Media

Please Note

This is a Summary of the original book. Ant Hive Media reads every chapter, extracts the understanding and leaves you with a new perspective and time to spare. We do the work so you can understand the book in minutes, not hours.

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GENERAL OVERVIEW

Named after a business allegory, The Phoenix Project focuses on a fictional business that turns into a profitable company after a big crisis-driven makeover happens in their IT management procedure.

The character of Bill Palmer receives a promotion to become vice president of the IT department at Parts Unlimited (a company that deals, manufactures and retails various automotive parts) when it was having trouble financially and in the process of launching a unique project.

Almost every day in the life of Palmer as VP, his day was composed of unplanned work that the department didn't have the resources to conduct. When he was working projects for the various department heads, Palmer met Erik Reid, a potential board member for Parts Unlimited. Their meeting turns interesting when Reid encourages Palmer to transform his IT department into a production factory of sorts. Each member of the department worked hard on two different and competing projects and at the same time, they attempted to change their incident and approval procedures. However, they still failed in launching the most crucial project they have, Phoenix, at the right time as well as with its target features.

The moment the Phoenix launch was derailed, the chief executive for the company gave the IT department a proviso – either they meet obligations or they get outsourced instead. Shortly after, another problem surfaces which leads to Palmer resigning since his CEO keeps undermining his strategy for the department. A couple of days afterwards, the CEO apologizes and requests Palmer to return to the company with the urging of the board members, including Reid who showed the CEO that his actions actually kept the IT department from working properly. Soon after, Reid helps the IT department by supervising the work at the IT department. During this, the department stops taking any new work and resumes their regular obligation. They also create a structure that functions on the DevOps principles.

Because the IT department is now working with more focus and cohesion, they have more time to create new projects including various recommendations and custom discounts to various customers. They also managed to automate testing

environments, which made them easier to evaluate. They continued to improve in each project including keeping track of gaps and doing random tests in security or emergency response. The moment all the changes were made and the IT department adopted the Three Ways of DevOps including focusing on the four kinds of work ((business projects, internal IT projects, changes, and unplanned work), shares for the company greatly improved which led the board to decide not to outsource the IT or split the company. The CEO then places Palmer to be the next chief operating officer.

IMPORTANT CHARACTERS

Gene Kim
Co-founder of Tripwire, an open source compliance and security automation company. He is also the author of Visible Ops and DevOps.

Kevin Behr
Founder of Information Technology Process Institute and also serves as chief strategist in Assemblage Pointe, a consultancy company he founded.

George Spafford
Worked on Gartner as research director for IT and DevOps.

Eliyahu Goldratt (1947-2011)
Author of the classic book, The Goal: A Process of Ongoing Improvement (1984). This serves as the basis for The Phoenix Project.

Wes Davis
Served as director for Distributed Technology Operations in Parts Unlimited.

Steve Masters
The head CEO for the company Parts Unlimited.

Patty McKee
Worked at Parts Unlimited as director for IT Service Support.

Sarah Moulton
Worked at Parts Unlimited as the senior vice president in the Retail Operations department.

Erik Reid
Worked at Parts Unlimited as a former factory director and possible board member.

Brent Geller
Worked at Parts Unlimited as lead engineer in the IT Department.

John Pesche
Worked at Parts Unlimited as CISO or Chief Information Security Officer.

CORE CONCEPTS

CORE CONCEPT 1
Failures in business management that stifle IT productivity include undermining its importance and not giving the IT department proper resources or the autonomy it needs to get the job done.

CORE CONCEPT 2
In order for operations and development to work together properly, they should be considered as two halves that make up a whole instead of competitors. Both of them are actually part of the larger resource chains that starts with a business target or goal and ends with the deployment or product release.

CORE CONCEPT 3
To make the work process visible, one would need total awareness of the control and resource spending with each project as they are discharged from the line. When it comes to releasing work, it's important this be decided on the resource availability that's most limiting. This limiting resource is called the constraint.

CORE CONCEPT 4
The moment the constraint is known, it's the team's prerogative to exploit this and subordinate it so it won't be relevant or necessary. Even if there is notable improvement in the deployment chain but to the point of constraint then it will not result in gains.

CORE CONCEPT 5
The main reason why a deployment chain should be properly documented is so that it can be later replicated and even automated in the future.

CORE CONCEPT 6
If a single resource is overused, tasks will sit in queue for a much longer period before proper attention is given to it. In between are wait times and these often stretch and multiply every time tasks are handed off to different workstations.

CORE CONCEPT 7

Whenever a team isn't doing anything to improve, its skills will naturally decrease.

CORE CONCEPT 8
There are four types of work: Internal IT projects, Changes, Business Tasks and Unplanned Recovery.

CORE CONCEPT 9
According to DevOps, the workflow should be from development to IT and then finally the customer. This should be utilized to great capacity and should be free from any defects.

CORE CONCEPT 10
For DevOps, the feedback flow should be from the customer, IT and onwards to development. This process should be mastered in order to avoid problems, improve recovery and detection as well as improve the quality.

CORE CONCEPT 11
The third shows that the IT culture that's part of a business should embrace changes, experimentation and risk taking. Learning how to do so can help with mastery.

CORE CONCEPT 12
This strategy from DevOps can also work for other departments and businesses that have an open source or personal software.

ANALYSIS OF CORE CONCEPTS

Core Concept 1

Failures in business management that stifle IT productivity include undermining its importance and not giving the IT department proper resources or the autonomy it needs to get the job done.

Analysis

Before the IT department was restructured inside Parts Unlimited, the assigned project manager was clueless on the amount of projects each employee handled in any working day. The workflow and process was nonexistent, hence the resources and workers were always stressed as the department kept getting assigned more work than they can actually work on. Because there was no oversight, it caused plenty of problems, which in turn resulted in more work that wasn't on the schedule.

In a different profession, the absence of visibility and understanding of a certain department's job would be hazardous or even seen as a crime. For example, inside a police department, if an officer neglects proper documentation of his process or fails to inform his superior about what he's doing, he could be violating the suspect's rights. It could also affect if a victim reports a crime or if an emergency call is made and wasn't documented. The same is true for a hospital. If a work is undocumented and there are no processes visible, it can result in neglect of other patients and tests would be incomplete or unattended. This is potentially dangerous to people's health because if there is no process, there could be no follow-up on the progress of the patient. It would also result in tasks being repeated because no one would know what's been done and what hasn't been done.

Core Concept 2

In order for operations and development to work together properly, they should be considered as two halves that make up a whole instead of as competitors. Both of them are actually part of the larger resource chains that start with a business target or goal and end with the deployment or product release.

Analysis

For Parts Unlimited, their IT department included the CEO, the Vice President, the CISO, Engineers, Developers, Directors of the smaller departments, and most people who added to the pipeline. There was no separation or even an outline for the responsibilities including the resources so there was no understanding as to what each one had to provide so they can reach the goal or end product.

Siloing is the term sometimes used among teams when a particular organization is isolated. This act is actually challenging to the company because it divides the group and forces them to fight it out for the budget and other resources including the IT support. This also means pushing blame away from their department so there won't be penalties in the budget. In September 2015, Manhattan's US chief prosecutor announced that General Motors had suffered this problem. They failed to issue a recall and report safety issues because the reporting wasn't left to a single group but instead spread out. Not a single department had all the information at one time so no one was capable of triggering the recall. If siloing is adopted in the IT department, it can cause gaps in the security if they think that the safety of customer data is assigned in a different department. This could then cause huge problems for the company.

Core Concept 3

To make the work process visible, one would need total awareness of the control and resource spending with each project as they are discharged from the line. When it comes to releasing work, it's important this be decided on the resource availability that's most limiting. This limiting resource is called the constraint.

Analysis

When they first started out, the IT department had no idea which work processes were ongoing and how the team was receiving their tasks. However, after seeing the processes behind a manufacturing plant, Palmer created new processes in place so each department knew which projects were being worked by whom, including what resources were becoming strained as well as how to handle the constraint best, which in this case was Brent, their lead engineer.

In order to understand the concept of constraint easily, think of it as similar to the limiting reagent in chemistry. Any type of process would need a steady amount of input. It can be workers, time, or materials so it can actually deliver an output. For those who aren't technical, if a recipe for making cookies needs 2 cups of flour and 1 bag of chocolate chips but the pastry chef or baker has 4 cups of flour and 1 bag of chocolate chips, the baker is still limited to only making one batch even if he has extra flour to make two because there's only 1 bag of chocolate chips available. It wouldn't be wise for the baker to start making an additional batch without another bag of cookies to complete the recipe. In the case of the IT department, it was Brent, the lead engineer's available time that was the constraint or limiting reagent. Sending product on deployment with Brent not having enough time to work would cause the project to stall on queue.

Core Concept 4

The moment the constraint is known, it's the team's prerogative to exploit this and subordinate it so it won't be relevant or necessary. Even if there is notable improvement in the deployment chain but to the point of constraint then it will not result in gains.

Analysis

After Palmer realized that Brent served as the constraint in the IT Department at Parts Unlimited, he made sure to guard Brent's time at work ensuring he spend it only on the tasks that were crucial. The process for this is similar to looking for the most successful method to filter out water. As the water travels from the dirty state to being cleansed of impurities, this is similar to the production line. The filter meanwhile, serves as the constraint. If you dump more water down into the filter, it won't magically turn into more water dripping out of from the filter. But, once the filter is identified as the constraint, pouring out the water can be hastened by making sure nothing is blocking the filter or there's nothing clogging it at any time. If the constraint is to be subordinate, this would require setting up another filter so the output can be doubled.

Core Concept 5

The main reason why a deployment chain should be properly documented is so that it can be later replicated and even automated in the future.

Analysis

At Parts Unlimited, they documented the processes for items done frequently or stuff that could affect certain parts of the company. They also documented all the changes happening to ensure it wouldn’t cause conflict with the others and so they have a good trace of the outages that happen in their area. They also made sure to document everything that Brent did so there's reference left for other people and they can do the same task later on, allowing Brent to have some free time. The documentation was also essential so the task could be automated thus minimizing mistakes.

A popular argument against automation is that it will force humans out of their jobs. However, at Parts Unlimited IT Department, automating the process didn't cause employees to get fired or laid off from the job. What happened instead is that automation allowed the same employees to work more on other things as opposed to limiting them. By automating most things, instead of acquiring more individuals, they were able to save money. This also prevented them from doing redundant work since they never hired people; there was no chance of mistakes being made as new employees had to learn their job. By learning which tasks could be automated and which ones can be done by real people, it allowed Brent some freedom to concentrate on the work he needed to do while some of the more mundane tasks were automated or assigned to other workers.

Core Concept 6

If a single resource if overused, tasks will sit in queue for a much longer period before proper attention is given to it. In between are wait times and these often stretch and multiply every time tasks are handed off to different workstations.

Analysis

After a bit of investigation, Palmer, together with his team realized that a simple job by Brent actually took over 63 hours since it would be diverted to about seven workstations also filled with work. Because of this long period of time, it had to be included in the project timeline.

The timeframe of how long a project will stay in queue for a particular department or workstation will depend on the type of timeframe set inside the workplace. For example, in lean manufacturing, the unit measure of time is done in cycles or the timeframe from starting a single iteration until the start of the next one.

Core Concept 7

Whenever a team isn't doing anything to improve, its skills will naturally decrease.

Analysis

Toyota's Improvement Kata is deeply embedded in its manufacturing process. Its purpose is to keep employees routinely encouraged to become better. Regardless of what they improve on, the crucial thing is that they don't stay stagnant. The moment no improvement is seen, then something is on the decline.

An IT capability can work like a muscle. A weightlifter, for instance, requires constant improvement. If he or she is capable of lifting 200 pounds and they decide to stop there, then they might find the next week they can only lift up to 175 pounds. If training stops, there is a general decline as the muscles break down. This goes the same for communication, team cohesion and skill mastery.

Core Concept 8

There are four types of work: Internal IT projects, Changes, Business Tasks and Unplanned Recovery.

Analysis

Regular business tasks are assigned to the IT department coming from other departments. This helps with their improving service to customers. Meanwhile, internal IT organizations usually work on projects that help advance the tools used to finish these business tasks. Most of the time, the changes are not specific and include fixing or updating systems. Doing recovery or unplanned work takes plenty of time from actual work. This is then considered as purely wasting time.

It's not only the IT department that separates their work into several of these categories. Most departments that find themselves in a bind often interrupt their current workflow just to handle unplanned work. If an HR department has business tasks that require hiring people, they also have other internal work like training new recruits to use the HR software, attending meetings etc. Moreover, HR handles the task of changes including changes in employee files, creating job postings, or handing job descriptions for supervisors. These little work projects can interrupt the actual work the HR does.

Core Concept 9

According to DevOps, the workflow should be from development to IT and then finally the customer. This should be utilized to great capacity and should be free from any defects.

Analysis

Any system inside a company that can eliminate flaws and always work toward progress in distributing product to customers can be considered a highly valuable system whether in programming or manufacturing. The First Way of DevOps serves as a good example of this ideal system. In the end, any business or company that can work towards minimizing and eliminating the occurrence of flaws would be in a position of advantage compared to a company that continues to have plenty of flaws. Depending on the size and arrangements, eliminating or minimizing these flaws will vary from one company to another. For instance, an IT section with plenty of people can assign a lot of people in quality assurance, or even have code mentors evaluate their work and give them tips on how to become better coders. Some small companies would have regular IT tasks including quality assurance, which in turn would belong to the deployment pipeline – the workflow that begins with a proposal to the finish project.

Core Concept 10

For DevOps, the feedback flow should be from the customer, IT and onwards to development. This process should be mastered in order to avoid problems, improve recovery and detection and improve the quality.

Analysis

When it comes to designing a product, it's important that users have feedback to make sure their devices are functioning properly or how much time they need to wait before going for the same thing again. One simple example of this is that on many websites, the color of the links often changes the moment a user clicks on them. This serves as affirmation that the site received this interaction and is currently loading the next page. Same goes for keyboards. When they are used, they depress while touchscreen keyboards often have sound or visually react when pressed. Doing this allows the user to know that there's progress and that they won't have to keep pressing keys over and over again. On the IT scene, when a developer learns that a customer feedback is fairly positive, it minimizes the need to change anything or fix bugs. However, if they receive negative feedback, it then becomes an important part of the work and the need for changing and perfecting it begins.

Core Concept 11

The third shows that the IT culture that's part of a business should embrace changes, experimentation and risk taking. Learning how to do so can help with mastery.

Analysis

Majority of the biggest companies out there are notorious for taking risks. There are those that fail while others manage to recover fast. Apple, despite how big they have become, also had their share of failures. They developed various unpopular products like the Apple TV. However, because of the culture they established, they made sure these unpopular products didn't put a hold on their resources and the company was able to use these to create even better products. Right now, Apple is a better-known company because of their successful offerings than their failures. In an ideal world, an IT based company should encourage their workers to keep experimenting, fail often and fast and then move on to the next thing if their use of resources didn't generate positive results.

Core Concept 12

This strategy from DevOps can also work for other departments and businesses that have an open source or personal software.

Analysis

On various occasions, the DevOps strategies were disregarded by the executives and employees that worked at Parts Unlimited. The reason was because they weren't familiar with it or it ran against their common sense. However, then they finally saw the benefits offered by the Kanban-style scheduling board or the practice of creating documentation, and changed their thoughts about it.

Companies that only started using the computer and creating an IT department right when it had become useful in the business, created these departments as an experiment. In fact, most might have never taken the proper steps to fully integrating them into their process or business. An HR department is seen as crucial because they are the ones who fill the vacancies. On the other hand, an IT department might not look very important unless it was implemented in a company or part of the world where IT is an absolute must. A restaurant won't think much of the IT department because it doesn't help in sourcing ingredients or worker's pay, however, if it's important for the company to generate receipts, receive feedback or issue paychecks electronically, then IT becomes a crucial part of restaurant. This kind of situation would also benefit from the DevOps strategy of creating an IT tribe within the company.

AUTHOR'S STYLE

Told with a first-person perspective, The Phoenix Project serves as a business allegory told through the eyes of the narrator who is an employee at a company where the DevOps change is happening. The style is similar to Goldratt's the Goal, and it takes readers all through the story without delivering the right principles or guidelines like any regular DevOps book might do. Instead of this straightforward approach, the narrator doles each of the lessons out as a personal revelation. Speaking of the narrator, he actually has several revelations, some are good, others are misguided making it difficult to judge which ones are correct. Towards the end of the book, you will find a clearer summary and guide outlining the advantages of DevOps but it doesn't fully explain the lessons each character takes away from the experience.

The voice of the narrator is quite assertive and he judges his co-workers rather harshly in many instances. Through this you can tell that he's not exactly a proper example of good behavior. There was one instance where he convinces the chief information security officer to lower his security standards, which would keep the auditors from seeing a strong violation of data security against the customer. However, the narrator's perspective on several things does change over time.

Some parts of the book do contain a mix of special terminology that might be challenging for certain readers who are not versed in development or technology terms. Moreover, the narrator himself used to be in the Marines, including a few of the other characters, so they sometimes use military acronyms as well. A good portion of the specialized terminology ranges from those in the development, virtualization, down to the version control as well as in the automation of security testing. There are also terms like "cycle time" which were never given any definition in the book. Other times various terms were introduced in the book like "subordinate" or "elevate" a constraint but no elaborate details were given.

AUTHOR'S PERSPECTIVE

The people behind The Phoenix Project are quite well versed about IT strategy and management. They have also been a part of the surging popularity of implementing the DevOps strategy in various technology-based businesses since 2008. The authors have all been a part of companies that relied on their IT capacities. To summarize the DevOps strategies, they showcase how the principles have become an integral portion of their core especially because they've seen how the strategies have contributed in the productivity of various leaders in the technology sector. Using the novel-like approach to the storytelling of the DevOps strategies, they were able to combine their experience as leaders and developers into a coherent, informative and realistic allegorical story.

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