Strategic Approaches to Implementing and Managing Change

Lewin

Kurt Lewin was an innovator in social and organizational psychology in the 1940s and established a cornerstone model for understanding effective organizational change. Most modern change models are based on this philosophy, which is unfreeze — change — refreeze, as illustrated in Figure 18-1.

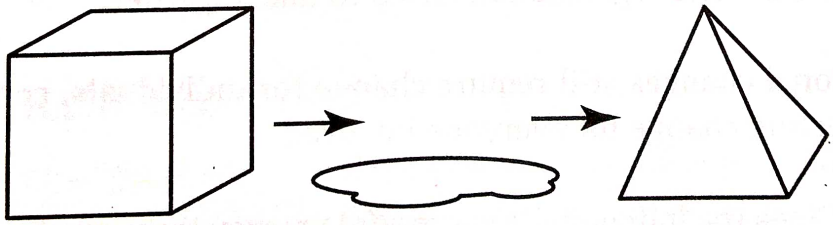

FIGURE 18-1: Lewin's unfreeze, change, refreeze change philosophy.

...change of a cube of ice, you first have to change it from

ADKAR's five steps to change

Awareness

Desire

Knowledge

Ability

Reinforcement

Platinum Edge's Change Roadmap

Step 1: Conduct an implementation strategy with success metrics

An *implementation strategy* is a plan that outlines the following:

- Your current strengths to build on as you transition
- The challenges you'll face based on your current structure
- Action items for how your organization will transition to agile project management

- **Current processes:** How does your organization run projects today? What does it do well? What are its problems?
- **Future processes:** How can your company benefit from agile approaches? What agile methods or frameworks will you use? What key changes will your organization need to make? What will your transformed company look like from a team and process perspective?
- **Step-by-step plan:** How will you move from existing processes to agile processes? What will change immediately? In six months? In a year or longer? This plan should be a roadmap of successive steps getting the company to a sustainable state of agile maturity.
- **Benefits:** What advantages will the agile transition provide for the people and groups in your organization and the organization as a whole? Agile techniques are a win for most people; identify how they will benefit.
- **Potential challenges:** What will be the most difficult changes? What departments or people will have the most trouble with agile approaches? Whose fiefdom is being disrupted? What are your potential roadblocks? How will you overcome these challenges?
- **Success factors:** What organizational factors will help you while switching to agile processes? How will the company commit to a new approach? Which people or departments will be agile champions?

Step 2: Build awareness and excitement

- **Educate people.** People in your organization may not know much — or anything — about agile project management. Educate people about agile principles and approaches and the change that will accompany the new approaches. You can create an agile wiki, hold lunchtime learning sessions, and even have hot-seat discussions (face-to-face discussions with leadership where people can talk safely about concerns and get their questions answered about changes and agile topics) to address concerns with the transition.
- **Use a variety of communication tools.** Take advantage of communication channels such as newsletters, blogs, intranets, email, and face-to-face workshops to get the word out about the change coming to your organizatio
- **Highlight the benefits.** Make sure people in your company know how an agile approach will help the organization create high-value products, lead to customer satisfaction, and increase employee morale; Chapter 19 has a grea list of the benefits of agile project management for this step.

- **Share the implementation plan.** Make your transition plan available to everyone. Talk about it, both formally and informally. Offer to walk people through it and answer questions. We often print the transition roadmap on posters and distribute it throughout the organization.

- **Involve the initial scrum team.** As early as you can, let the people who may work on your company's first agile project know about the upcoming changes. Involve the initial scrum team members in planning the transition to help them become enthusiastic agile practitioners.

- **Be open.** Drive the conversation about new processes. Try to stay ahead of the company rumor mill by speaking openly, answering questions, and quelling myths about agile project management. Structured communications like the hot-seat sessions we mention earlier are a great example of open communication.

Step 3: Form a transformation team and identify a pilot project

When selecting your first agile project, look for an endeavor with these qualities:

- **Appropriately important:** Make sure the project you choose is important enough to merit interest within your company. However, avoid the most important project coming up; you want room to make and learn from mistakes. See the note on the blame game in the later section "Avoiding Pitfalls."

- **Sufficiently visible:** Your pilot project should be visible to your organization's key influencers, but don't make it the most high-profile item on the agenda. You will need the freedom to adjust to new processes; critical projects may not allow for that freedom on the first try of a new approach.
- **Clear and containable:** Look for a product with clear requirements and a business group that can commit to defining and prioritizing those requirements. Try to choose a project that has a distinct end point, rather than one that can expand indefinitely.
- **Not too large:** Select a project that you can complete with no more than two scrum teams working simultaneously to prevent too many moving parts at once.
- **Tangibly measurable:** Choose a project that you know can show measurable value within sprints.

TECHNICAL STUFF

see dips in performance before they see improvements. *Satir's Curve*, shown in Figure 18-4, illustrates the process of teams' excitement, chaos, and finally adjustment to new processes.

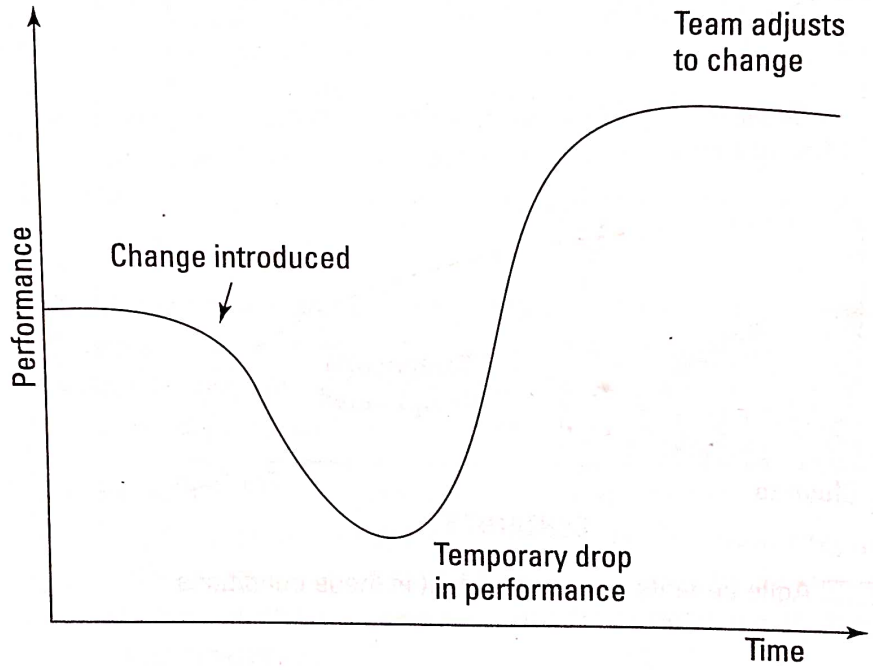

FIGURE 18-4: Satir's Curve.

Step 4: Build an environment for success

One of the agile principles states, "Build projects around motivated individuals. Give them the environment and support they need, and trust them to get the job done."

Step 5: Train sufficiently and recruit as needed

Step 6: Kick off the pilot with active coaching

- **In sprint 1,** scrum teams take on 25 percent of the work they think they can complete during sprint planning.
- **In sprint 2,** scrum teams take on 50 percent of the work they think they can complete during sprint planning.
- **In sprint 3,** scrum teams take on 75 percent of the work they think they can complete during sprint planning.
- **In sprint 4 and beyond,** scrum teams take on 100 percent of the work they think they can complete during sprint planning.

Throughout the first sprint, be sure to consciously stick with agile practices. Think about the following during your first sprint:

- Have your daily scrum meeting, even if you feel like you didn't make any progress. Remember to state roadblocks, too!
- The development team may need to remember to manage itself and not look to the product owner, the scrum master, or anywhere besides the sprint backlog for task assignments.
- The scrum master may have to remember to protect the development team from outside work and distractions, especially while other members of the organization get used to having a dedicated agile project team around.
- The product owner may have to become accustomed to working directly with the development team, being available for questions, and reviewing and accepting completed requirements immediately.

Step 7: Execute the Roadmap to Value

When you've chosen your pilot project, don't fall into the trap of using a plan from an old methodology or set of habits. Instead, use agile processes from the project's start.

Step 8: Gather feedback and improve

You'll naturally make mistakes at first. No problem. At the end of your first sprint, you gather feedback and improve with two important events: the sprint review and the sprint retrospective.

In your first sprint retrospective, pay extra attention to the following:

- Keep in mind how well you met the sprint goal, not how many user stories you completed.
- Go over how well you completed requirements to meet the definition of done: defined, tested, integrated, and documented.
- Discuss how you met your project success metrics.
- Talk about how well you stuck with agile principles. We start the journey with principles.
- Celebrate successes, even small gains, as well as examine problems and solutions.
- Remember that the scrum team should manage the meeting as a team, gain consensus on how to improve, and leave the meeting with a plan of action.

Step 9: Mature and solidify improvements

Inspecting and adapting enables scrum teams to grow as a team and with each sprint.

Agile practitioners sometimes compare the process of maturing with the martial arts learning technique of *Shu Ha Ri*, a Japanese term that can be translated to "maintain, detach, transcend." The term describes three stages in which people learn new skills:

Step 10: Progressively expand within the organization

To progressively scale agile project management across an organization, start with the following:

- **Seed new teams.** An agile project team that has reached maturity — the people who worked on the first agile project — should now have the expertise and enthusiasm to become agile ambassadors in the organization. These people can join new agile project teams and help those teams learn and grow.
- **Redefine metrics.** Identify measurements for success, across the organization, with each new scrum team and with each new project.
- **Scale methodically.** It can be exciting to produce great results, but company-wide improvements require significant process changes. Don't move faster than the organization can handle. Check out Chapter 17 for different ways of scaling agile projects across multiple teams.
- **Identify new challenges.** Your first agile project may have uncovered roadblocks that you didn't consider in your original implementation plan. Update your strategy and maturity roadmap as needed.
- **Continue learning.** As you roll out new processes, make sure that new team members have the proper training, mentorship, and resources to effectively run agile projects.

Avoiding Pitfalls

TABLE 18-1 **Common Agile Transition Problems and Solutions**

Problem	Description	Potential Solution
Faux agile or double work agile or both	Sometimes organizations will say that they are "doing agile." They may go through some of the practices used on agile projects, but they haven't embraced agile principles and continue creating waterfall deliverables and products. This is sometimes called *faux agile* and is a sure path to avoiding the benefits of agile techniques. Trying to complete agile processes in addition to waterfall processes, documents, and meetings is another faux agile approach. *Double work agile* results in quick project team burnout. If you're doing twice the work, you aren't adhering to agile principles.	Insist on following one process — an agile process. Garner support from management to avoid non-agile principles and practices.
Lack of training	Investment in a hands-on training class will provide a quicker, better learning environment than even the best book, video, blog, or white paper. Lack of training often indicates an overall lack of organizational commitment to agile practices. Keep in mind that training can help scrum teams avoid many of the mistakes on this list.	Build training into your implementation strategy. Giving teams the right foundation of skills is critical to success and necessary at the start of your agile transition.
[illegible]	The product owner role is non-traditional. Agile	Start the project with a person

Ineffective product owner	The product owner role is non-traditional. Agile project teams need a product owner who is an expert on business needs and priorities and can work well with the rest of the scrum team on a daily basis. An absent or indecisive product owner will quickly sink an agile project.	Start the project with a person who has the time, expertise, and temperament to be a good product owner. Ensure the product owner has proper training. The scrum master can help coach the product owner and may try to clear roadblocks preventing the product owner from being effective. If removing impediments doesn't work, the scrum team should insist on replacing the ineffective product owner with a product owner — or at least an agent — who can make product decisions and help the scrum team be successful.

TABLE 18-1 *(continued)*

Problem	Description	Potential Solution
Lack of automated testing	Without automated testing, it may be impossible to fully complete and test work within a sprint. Manual testing requires time that fast-moving scrum teams don't have.	You can find many low-cost, open-source testing tools on the market today. Look into the right tools and make a commitment as a development team to using those tools.
Lack of transition support	Making the transition successfully is difficult and far from guaranteed. It pays to do it right the first time with people who know what they are doing.	When you decide to move to agile project management, enlist the help of an agile mentor — either internally from your organization or externally from a consulting firm — who can support your transition. Process is easy, but people are hard. It pays to invest in professional transition support with an experienced partner who understands behavioral science and organizational change.

		organizational change.
Inappropriate physical environment	When scrum teams are not collocated, they lose the advantage of face-to-face communication. Being in the same building isn't enough; scrum teams need to sit together in the same area.	If your scrum team is in the same building but not sitting in the same area, move the team together. Consider creating a room or annex for the scrum team to continually collaborate. Try to keep the scrum team area away from distracters, such as the guy who can talk forever or the manager who needs just one small favor. Before starting a project with a dislocated scrum team, do what you can to enlist local talent. If you must work with a dislocated scrum team, take a look at Chapter 14 to see how to manage dislocated teams.
Poor team selection	Scrum team members who don't support agile processes, don't work well with others, or don't have capacity for self-management will sabotage a new agile project from within.	When creating a scrum team, consider how well potential team members will enact the agile principles. The keys are versatility and a willingness to learn.

Problem	Description	Potential Solution
Discipline slips	Remember that agile projects still need requirements, design, development, testing, and releases. Doing that work in sprints requires discipline.	You need more, not less, discipline to deliver working functionality in a short iteration. Progress needs to be consistent and constant. The daily scrum helps ensure that progress is occurring throughout the sprint. Use the sprint retrospective as an opportunity to reset approaches to discipline.
Lack of support for learning	Scrum teams succeed as teams and fail as teams; calling out one person's mistakes (known as the *blame game*) destroys the learning environment and destroys innovation.	The scrum team can make a commitment at the project start to leaving room for learning and to accepting success and failures as a group.
Diluting until dead	Watering down agile processes with old waterfall habits erodes the benefits of agile processes until those benefits no longer exist.	When making process changes, stop and consider whether those changes support the Agile Manifesto and the 12 Agile Principles. Resist changes that don't work with the manifesto and principles. Remember to maximize work not done.