**SCRUM FOR DUMMIES CHEAT SHEET**

Scrum focuses on continuous improvement, scope flexibility, team input, and delivering quality products. Scrum adheres to the Agile Manifesto and the 12 Agile Principles, which focus on people, communications, the product, and flexibility.

## SCRUM: AGILE SOFTWARE DEVELOPMENT MANIFESTO

Scrum is a team approach to project management that aligns with the Agile Manifesto. The Agile Manifesto is an intentionally streamlined expression of the core values of agile project management.

“We are uncovering better ways of developing software by doing it and helping others do it. Through this ork, we have come to value:

* Individuals and interactions over processes and tools
* Working software over comprehensive documentation
* Customer collaboration over contract negotiation
* Responding to change over following a plan

That is, while there is value in the items on the right, we value the items on the left more.”

## PRINCIPLES BEHIND SCRUM AND THE AGILE MANIFESTO

Scrum is an approach that aligns to the values of the Agile Manifesto and the 12 Agile Principles. The 12 Agile Principles are a set of guiding concepts that support project teams in implementing agile projects.

1. Our highest priority is to satisfy the customer through early and continuous delivery of valuable software.
2. Welcome changing requirements, even late in development. Agile processes harness change for the customer’s competitive advantage.
3. Deliver working software frequently, from a couple of weeks to a couple of months, with a preference to the shorter timescale.
4. Business people and developers must work together daily throughout the project.
5. Build projects around motivated individuals. Give them the environment and support they need, and trust them to get the job done.
6. The most efficient and effective method of conveying information to and within a development team is face-to-face conversation.
7. Working software is the primary measure of progress.
8. Agile processes promote sustainable development. The sponsors, developers, and users should be able to maintain a constant pace indefinitely.
9. Continuous attention to technical excellence and good design enhances agility.
10. Simplicity — the art of maximizing the amount of work not done — is essential.
11. The best architectures, requirements, and designs emerge from self-organizing teams.
12. At regular intervals, the team reflects on how to become more effective, then tunes and adjusts its behavior accordingly.

## SCRUM AND THE AGILE ROADMAP TO VALUE

Scrum is an implementation of agile project management. The roadmap to value is a high-level view of an agile project and is a guide for your project. It includes the following stages:

* **In Stage 1, the product owner identifies the *product vision.***

The product vision is a definition of what your product is, how it will support your company’s or organization’s strategy, and who will use the product. On longer projects, revisit the product vision at least once a year.

* **In Stage 2, the product owner and business stakeholders create a *product roadmap.***

The product roadmap is a high-level view of the product requirements, with a loose time frame for when you will develop those requirements. Identifying product requirements and then prioritizing and roughly estimating the effort for those requirements are a large part of creating your product roadmap. On longer projects, revise the product roadmap at least twice a year.

* **In Stage 3, the product owner creates a *release plan.***

The release plan identifies a high-level timetable for the release of product. An agile project will often have many releases, with the highest-priority features launching first. Create a release plan at the beginning of each release.

* **In Stage 4, the product owner, the scrum master, and the development team plan sprints and starts creating the product within those sprints.**

*Sprint planning* sessions take place at the start of each sprint, where the scrum team determines what requirements will be in the upcoming sprint, and the development team breaks those requirements into specifics tasks necessary to create the functionality.

* **In Stage 5, during each sprint, the development team has *daily scrum* meetings*.***

In the daily scrum meeting*,* you spend no more than 15 minutes organizing the priorities of the day and discussing what you completed yesterday, what you will work on today, and any roadblocks you have.

* **In Stage 6, the team holds a *sprint review.***

In the sprint review*,* at the end of every sprint, the scrum team demonstrates the working product created during the sprint to the product stakeholders.

* **In Stage 7, the team holds a *sprint retrospective.***

The sprint retrospective is a meeting where the scrum team discusses how the sprint went and plans for improvements in the next sprint. Like the sprint review, you have a sprint retrospective at the end of every sprint.

## SCRUM ROLES

Scrum mobilizes the project team around a specific set of functionality that the organization wants to release to the marketplace. Scrum teams include people in three roles for project management:

**Development team:** The group of people who do the work of creating a product. Programmers, testers, designers, writers, and anyone else who has a hands-on role in product development is a member of the development team.

**Product owner:** The person responsible for bridging the gap between the customer, business stakeholders, and the development team. The product owner is an expert on the product and the customer’s needs and priorities. The product owner works with the development team daily to help clarify requirements.

The product owner is sometimes called a *customer representative.*

**Scrum master:** The person responsible for supporting the development team, clearing organizational roadblocks, and keeping the agile process consistent.

A scrum master is sometimes called a *project facilitator.*

Two additional roles should be considered as part of the entire project team:

**Stakeholders:** Anyone with an interest in the project. Stakeholders are not ultimately responsible for the product, but they provide input and are affected by the project’s outcome. The group of stakeholders is diverse and can include people from different departments, or even different companies.

**Agile mentor:**Someone who has experience implementing agile projects and can share that experience with a project team. The agile mentor can provide valuable feedback and advice to new project teams and to project teams that want to perform at a higher level.

## SCRUM ARTIFACTS

Scrum teams use three scrum *artifacts,* or deliverables, plus three other common agile practices to develop products in project management. As your team implements its plan, check for these articles and practices:

**Product vision statement:**An elevator pitch, or a quick summary, to communicate how your product supports the company’s or organization’s strategies. The vision statement must articulate the goals for the product. The product vision statement is a common agile practice but is not a scrum artifact.

**Product roadmap:**The product roadmap is a high-level view of the product requirements, with a loose time frame for when you will develop those requirements. The product roadmap is also a common agile practice but is not a scrum artifact.

**Product backlog:**The full list of what is in the scope for your project, ordered by priority. After you have your first requirement, you have a product backlog.

**Release plan:**A high-level timetable for the release of working software. The release plan is a common agile practice, although release planning is inherently part of scrum.

**Sprint backlog:**The goal, user stories, and tasks associated with the current sprint.

**Increment:** The working product functionality at the end of each sprint.

## SCRUM ACTIVITIES

Scrum projects include five essential activities, plus two common agile practices, for product development. These processes enhance efficiency and performance from the first day to the last day of your project:

**Project planning:**The initial planning for your project. Project planning includes creating a product vision statement and a product roadmap, and can take place in as little time as one day. Project planning is a common agile practice but is not a scrum activity.

**Release planning:** Planning the next set of product features to release and identifying an imminent product launch date around which the team can mobilize. On agile projects, you plan one release at a time. Although release planning is referred to in scrum, it is a common agile practice, not an official scrum activity.

**Sprint:** A short cycle of development in which the team creates potentially shippable product functionality. Sprints, sometimes called *iterations,* typically last between one and four weeks. Sprints can last as little as one day but should not be longer than four weeks. Sprint length can change during the project, but velocity will be impacted by the duration change.

**Sprint planning:** A meeting at the beginning of each sprint where the scrum team commits to a sprint goal. They also identify the requirements that support this goal and will be part of the sprint, and the individual tasks it will take to complete each requirement.

**Daily scrum:** A 15-minute meeting held each day in a sprint. Here development team members coordinate on the priorities of the day, stating what they completed the day before, what they will focus on the current day, and whether they have any roadblocks.

**Sprint review:** A meeting at the end of each sprint, introduced by the product owner, where the development team demonstrates the working product functionality it completed during the sprint.

**Sprint retrospective:** A meeting at the end of each sprint, where the scrum team discusses what went well, what could change, and how to make any changes.

## SCRUM SALES PROCESS

Application Scrum can be used as part of the sales process. Successful salespeople are exceptional listeners and have keen observation skills. One goal is to discover prospects’ problems and then show how the product or service solves those problems. To make this connection, a salesperson needs to establish a relationship based on trust. People buy things from people they know and trust.

Scrum selling is about gaining trust through teamwork. The supporting players may include presales, business development, account executives, field engineers, installers, inside sales and support, and service people. Any combination of these people can make up a scrum team and swarm to synchronize communication, supporting the effort to get the client to sign a deal. Swarming activities might revolve around the following:

* Preparing for a trade show
* Following up with trade-show leads
* Developing time-bound proposals to potential solutions for a sales pitch to out-class the competition
* Saving an at-risk sale by brainstorming and prioritizing action items

Sales cycles are more successful when a potential consumer or business is pulled toward a product or solution as opposed to responding to a pure outbound “cold call” approach. Pull strategies involve content marketing, webinars, trade shows, and social media marketing.

The scrum sales process is high-touch and commonsense. It mirrors the roadmap to value as follows:

1. **Vision**

*Example:* Grow gross sales in Dallas by 20 percent this fiscal year by increasing the company’s social media presence and analytics. Follow up with a personal phone call or email to everyone who provides contact information.

1. **Product roadmap (high-level) and product backlog (broken down)**

*Example:* High-level and low-level lists of changes are needed to make the vision a reality, such as

* + Sales strategy development
  + Acquisition of tools
  + Development of collateral
  + Sales process development and fine-tuning
  + Execution needed for specific deals in the process
  + Assigning key (detailed) social media sites to a team member
  + Finding a tool for tracking sales funnels that the team will use
  + Defining such reporting processes as analytics workflows

1. **Release planning**

*Example:* Prioritize backlog items by month and/or quarter.

1. **Sprint planning**

*Example:* As a team, create tasks and assignments for the backlog items.

1. **Sprint**

*Example:* Hold daily stand-up meetings to coordinate swarming tasks for the day and identify impediments.

1. **Sprint review**

*Example:* Demonstrate to the stakeholders (such as the vice president of sales) that the sprint is complete (the Facebook page is operational, for example, or mailing lists of past customers are compiled).

1. **Sprint retrospective**

*Example:* Review what worked well and facilitate knowledge transfer. Service/installation people are learning how new customers are being acquired, for example, which helps them continue the company messaging that leads to the sale.

## SCRUM ORGANIZATIONS, CERTIFICATIONS, AND RESOURCES

The scrum community provides powerful online services to help you find and develop your skills.

* [**Scaled Agile Framework (SAFe)**](http://scaledagileframework.com/): The Scaled Agile Framework (SAFe) is a knowledge base for implementing agile practices and scrum at scale. (SAFe is a registered trademark of Scaled Agile Inc.)
* [**Large-Scale Scrum (LeSS)**](http://less.works/): Large-Scale Scrum (or LeSS) is a scrum scaling method that provides two different frameworks known as basic LeSS and LeSS Huge.

## SCRUM AND YOUR CUSTOMERS: THE MOST CRUCIAL STAKEHOLDERS

Your customers are the perfect addition to your scrum because they are great sources of product innovation ideas and improvements. Alienating them not only creates ill will, but also cuts off a crucial feedback loop that can lead to innovation.

Internet service providers, phone companies, and local utilities consistently rank among the highest in customer service complaints. Where service providers are limited, customer service is commonly (although not always) weaker than in other industries. Customers frequently encounter long hold times, frustrating service, and labyrinthine automated service menus. Pressures on the bottom line have caused many companies to cut the budget for customer service, yet customers are the most crucial stakeholders in any business, and they need to be provided good service. Without the customers, there’s no business.

Comcast is an example of a company that has experienced bad press regarding the quality of its customer service. Instances of customers unable to get refunds for bogus charges, wait times forced until closing, and an inability to cancel subscriptions are just a few of the claims that have been made over the years.

Although the need for service is enormous, quality is often lacking, and millions of people are willing to spend the time to make others aware of their experience. Customer complaints about the handling of their service calls abound.

## THE SERVICE CONUNDRUM

Perhaps the number-one failure in service is that customers often report that their issues aren’t even solved by the agent. Customers need and expect service representatives to be able to answer questions and solve problems regarding their companies’ products. Unfortunately, all too often, training in companies fails to provide the customer service representatives with the knowledge they need to meet this need of the customers.

The service representative may not understand the problem because the customer explains it poorly, or the representative simply doesn’t understand the situation the customer is describing.

Seventy-eight percent of customers state that their good customer service experience was due to the knowledge the rep had, while only 38 percent said it was due to personalization. Knowledge matters. Training development for representatives is a high priority. Preplanned answers don’t carry the weight of true depth of knowledge.

The cost of losing a customer is far more than the customer’s annual subscription rate. Customer service divisions are often thought of as being cost centers, but in fact they save and make their firms huge amounts of revenue. Following are some statistics that reflect how customer service can affect a business in ways that you may not have considered:

* It’s more than six times more expensive to gain a new client than to keep a current one.
* 78 percent of customers have forgone a purchase or transaction due to poor service.
* Loyal customers are worth up to ten times the amount of their initial purchases.
* Twelve positive experiences are needed to make up for one negative one.
* For every customer who takes the time to complain, 26 others tell their friends instead.

## INFORMATION OVERLOAD

In this day and age, too much data is quoted as a source of call center failures. Too much information can paralyze the effective functioning of a service representative. Service representatives can become overwhelmed with too much data that’s hard to use, and many centers haven’t managed this information so that it’s useful to representatives.

Perhaps you’ve been on a call with one representative and been transferred to another, only to find that you had to explain the issue all over again. Often, a client’s historical data doesn’t get fed to the rep. It’s frustrating for the customer to rehash his situation or to hear the ominous words “I have no record of your claim here.”

Getting the right information to the right people is part of the problem. Sixty percent of customer service centers say they aren’t even able to get certain pieces of customer information (for example, portions of customer history) to service representatives. On top of this, more than 30 percent of representatives don’t gather and record customer satisfaction data.

Sometimes, data isn’t consolidated between organizational divisions, or the data is hard to find. Firms are experts at gathering information, but timely and effective distribution of that knowledge is a problem.