



# Scaling Agile

**AGILE**

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**RefineM** PROJECT MANAGEMENT CONSULTING

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## Agenda

1. What is Virtual Lunch & Learn
2. Your Expectations from this Webinar
3. Introduction – Myself
4. Scaling Agile
  - a. **General Principles**
  - b. **Scaled Agile Framework (SAFe)®**
  - c. **Disciplined Agile Delivery (DAD)**
  - d. **Large-Scale Scrum (LeSS)**
  - e. **Comparison of Frameworks**
5. Upcoming Learning Opportunities from RefineM
6. How to get 1 PDU for this Webinar?
7. Rewarding Our Loyal Attendees
8. Q & A

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## RefineM's Virtual Lunch & Learn

**This is a monthly webinar delivered during the lunch hour in the first week (Wednesdays) of every month.**

**It's designed to help you learn while you eat lunch, providing a relaxed environment to enhance your experience.**

**The monthly webinars will cover a variety of Project Management / Agile topics.**

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## Your Expectations

What are your expectations from this webinar?

Why are you here today?

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# RefineM

**Helping organizations turn their project management capability into a *competitive advantage***

My professional journey b/f RefineM



- \* CEO/Consultant since Dec 2011
- \* Agile Coaching/Adoption
- \* Project Management/ Process Improvement Consulting and Training
- \* Project Management Toolkits (for PMs, Executives and Agile Practitioners)
  
- \* 20+ years of Successful Project Leadership
- \* Led 100s of projects of all sizes, successfully
- \* Recovered many projects, saved millions of \$
- \* Implemented numerous process improvements
- \* Coached/mentored 100s of PMs, and some executives
- \* Board Member – SWMO PMI Chapter (2008-2014)

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# Scaling Agile

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- General Principles
- Scaled Agile Framework (SAFe)<sup>®</sup>
- Disciplined Agile Delivery (DAD)
- Large-Scale Scrum (LeSS)
- Comparison of Frameworks

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## Why Scale Agile?

- \* Benefits of agile are great for a team of 5-9 people
  - ✓ Consistent delivery of working software, more customer engagement
- \* Harder to use agile with large, complex projects
  - ✓ Minimum viable product (MVP) may be much larger than in small teams
  - ✓ More coordination and process rigor is required
- \* Benefits of scaling include:
  - ✓ More consistent delivery and agile awareness across the enterprise
  - ✓ Greater ability to handle large, complex projects in an agile way

***Scaling Agile is a solution for the enterprise***

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## How to Scale Agile?

- \* Organize teams of 5-9 with a “scrum of scrums”
  - ✓ Each team sends one representative
  - ✓ Can be held daily or 2-3 times per week
  - ✓ Can be effective by itself but companies may need more rigor
- \* Use a framework for scaling agile
  - ✓ Scaled Agile Framework (SAFe)<sup>®</sup>
  - ✓ Disciplined Agile Delivery (DAD)
  - ✓ Large-Scale Scrum (LeSS)
  - ✓ Many others; go to [AgileScaling.org](http://AgileScaling.org) for more info

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## Number One Tip for Scaling Agile

- \* Don't jump right into comparing frameworks - why?
  - ✓ There are a lot of frameworks
  - ✓ Scaling agile is a significant business commitment
  - ✓ Blindly trying any approach is likely to waste time and money

***Perform self-assessment first to determine your needs***

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## Evaluate Needs and Desired Outcome

- \* What is our business strategy?
  - ✓ How has agile helped achieve it?
- \* How many projects are planned?
  - ✓ What is their average size and complexity?
- \* How many agile teams are there?
  - ✓ What is the magnitude of transition?
- \* What key benefits are possible at scale?
  - ✓ Will it make us efficient in delivering on our strategy?
- \* What are the critical success factors of transition?
  - ✓ Is it really going to work in our culture?
  - ✓ Can the current agile teams maintain/enhance their performance at scale or will it become a worse nightmare?
  - ✓ What are the other risks of scaling?

***Is it worth the investment of time, money and resources?***

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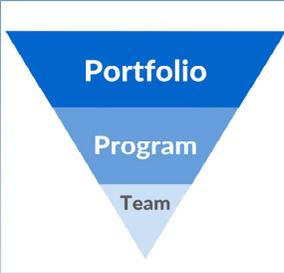
## More Tips for Scaling Agile

Top 5 Tips for Success in Scaling Agile (VersionOne, 2015)	%
Consistent process and practices <i>Following consistent processes and best practices keeps the transition smooth.</i>	42%
Executive sponsorship <i>Support of key stakeholders is an important factor in the success of any transition.</i>	40%
Implementing a common tool across teams <i>Keeping tools consistent across the enterprise also keeps the transition smooth.</i>	39%
Agile consultants or trainers <i>Agile coaches can help companies adopt a framework and reinforce best practices.</i>	35%
Internal agile support team <i>A strong foundation of internal agile knowledge helps solve scaling problems.</i>	31%

Source: [VersionOne Ninth Annual State of Agile Survey](#).


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## Scaled Agile Framework (SAFe)<sup>®</sup>



- Overview
- Portfolio Level
- Program Level
- Team Level
- Pros and Cons
- Certifications
- Who Uses SAFe<sup>®</sup>?

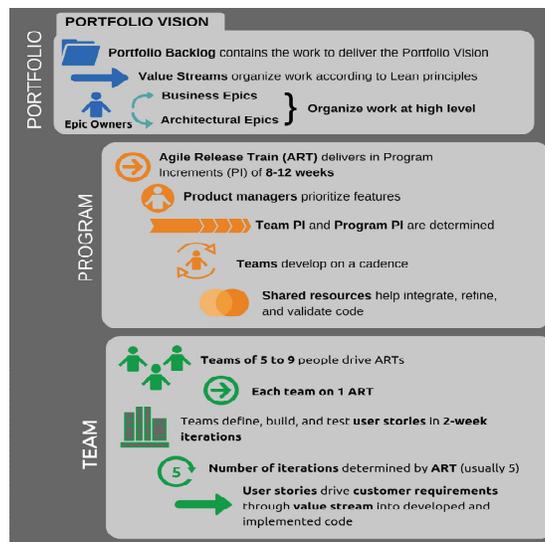


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## Scaled Agile Framework (SAFe)<sup>®</sup>

- \* Created by Dean Leffingwell
- \* Portfolio, Program, and Team-level planning
- \* Uses Agile Release Train (ART) to organize teams
- \* Teams deliver according to value streams
- \* Used by 19% of respondents in VersionOne's survey

## SAFe<sup>®</sup> Summary



## SAFe®: Portfolio Level

- \* Investment themes
  - ✓ Six-month theme that drives budgeting from top
- \* Business epics: customer-facing
- \* Architectural epics: technical solutions
- \* Release trains deliver consistent Potentially Shippable Increments (PSIs) in value streams
- \* Business, architectural epics drive investment themes

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## SAFe®: Program Level

- \* Release Train includes 5-10 teams
- \* Potentially Shippable Increment (PSI) every 10 weeks
- \* Managed by Release Train Engineer
- \* Product Manager manages value stream
- \* Shared resources across all teams for consistency
  - ✓ UX designer
  - ✓ Security specialist
  - ✓ Database specialist
  - ✓ Possibly others

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## SAFe®: Team Level

- \* Define, build, test working software every two weeks
- \* Use Scrum, XP practices including scrum of scrums
- \* Develop in cadence to match with Release Train
- \* Team composition
  - ✓ Developers
  - ✓ Testers
  - ✓ Product Owner
  - ✓ ScrumMaster

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## Pros and Cons of SAFe®

- \* Pros
  - ✓ Provides more guidance on program/portfolio
    - Not many other frameworks handle program and portfolio
  - ✓ Sharing resources helps ensure consistency
  - ✓ Using value streams helps companies eliminate waste
- \* Cons
  - ✓ Rigid in many ways, including 2-week iterations
  - ✓ May be more than your company needs
  - ✓ May be too prescriptive for some

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## Who Has Used SAFe®?

\* Many examples available on SAFe® website, elsewhere

- ✓ Intel
- ✓ John Deere
- ✓ SEI
- ✓ IBM
- ✓ Philips Lighting

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## Disciplined Agile Delivery (DAD)



- Overview
- DAD Primary Roles
- Secondary Roles
- Typical Delivery Cycle
- Pros and Cons
- Certifications
- Who Uses DAD?

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## Disciplined Agile Delivery (DAD)

- \* Created by Scott Ambler and Mark Lines
  - ✓ Wrote 2012 book *Disciplined Agile Delivery*
- \* Originally developed for IBM
- \* People-first approach
- \* Emphasizes roles over processes
- \* Used by 4% of respondents in VersionOne's survey

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## DAD Primary Roles

- \* Team Lead
  - ✓ Servant leader who acts as agile coach
- \* Product Owner
  - ✓ Serves as voice of the customer
- \* Architecture Owner
  - ✓ Head of solution design decisions
- \* Team Member
  - ✓ Anyone involved in producing solution
- \* Stakeholder
  - ✓ Anyone "materially impacted" by project outcome

***Primary roles always on the team regardless of size***

Source: <http://www.disciplinedagiledelivery.com/roles-on-dad-teams/>

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## DAD Secondary Roles

- \* Specialist
  - ✓ May be a business analyst, program manager, or other role
- \* Domain Expert
  - ✓ Serves as subject matter expert for topics related to project
- \* Technical Expert
  - ✓ May be a UX designer, build specialist, or other special technical role
- \* Independent Tester
  - ✓ Works in parallel with team, runs specific tests throughout lifecycle
- \* Integrator
  - ✓ Builds whole system from various subsystems

***Secondary roles come in as needed, may be unfilled***

Source: <http://www.disciplinedagiledelivery.com/roles-on-dad-teams/>

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## DAD Typical Delivery Cycle

- \* Inception: Develop project vision and plan project
- \* Construction: Incrementally build the solution
- \* Transition: Release the consumable solution
- \* Goal is to shrink Inception and Transition over time
  - ✓ As team improves, move closer to continuous delivery

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## Consumable Solutions

- \* DAD pushes for “consumable solutions”
- \* A consumable solution is not just working software
  - ✓ Also includes:
    - Documentation
    - Ongoing support
    - Anything else that adds value to customer


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## DAD Scaling Factors



**Disciplined Agile Delivery**

**Team size**

Under 10 developers ↔ 1000's of developers

**Compliance requirement**

Low risk ↔ Critical, audited

**Geographical distribution**

Co-located ↔ Global

**Domain Complexity**

Straight-forward ↔ Intricate, emerging

**Enterprise discipline**

Project focus ↔ Enterprise focus

**Organization distribution (outsourcing, partnerships)**

Collaborative ↔ Contractual

**Organizational complexity**

Flexible ↔ Rigid

**Technical complexity**

Homogenous ↔ Heterogeneous, legacy



Source: [VersionOne Ninth Annual State of Agile Survey.](#)

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## DAD Pros and Cons

### \* Pros

- ✓ Less prescriptive than other frameworks
- ✓ More flexible to small to medium sized companies

### \* Cons

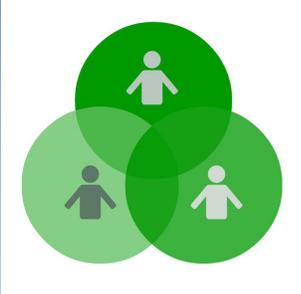
- ✓ Not used very widely
- ✓ May be hard to find consultants or coaches

## Who Has Used DAD?

### \* Examples available on DAD website and elsewhere

- ✓ IBM
- ✓ RDA Corporation
- ✓ European Commission
- ✓ Panera Bread

## Large-Scale Scrum (LeSS)



- Overview
- Regular LeSS
- LeSS Huge
- Reduced Role of Management
- Pros and Cons
- Who Uses LeSS?


  
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## Large-Scale Scrum (LeSS)

- \* Created by Craig Larman and Bas Vodde
  - ✓ From the book *Practices for Scaling Lean and Agile Development*
- \* Regular Scrum with additional rules
- \* Or, Scrum applied to large-scale development
- \* Divided into Regular LeSS and LeSS Huge
- \* Used by 3 percent of respondents in VersionOne survey


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## Regular LeSS

- \* 2-8 teams, all of which share the following:
  - ✓ Product Owner
  - ✓ Product Backlog
  - ✓ Definition of Done
- \* Each team has its own sprint backlog and retrospectives
- \* ScrumMasters work for up to three teams at a time

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## LeSS Huge

- \* Designed to be used by more than 8 teams
- \* Shares most features of Regular LeSS
- \* Also adds “Requirement Areas”
  - ✓ Related clusters of customer requirements
  - ✓ Each has its own product owner and 4-8 teams

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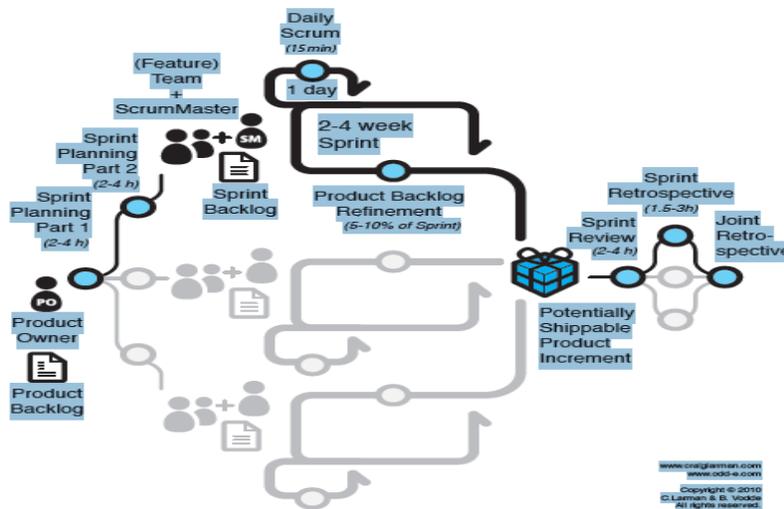
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## Reduced Role of Management

- \* Product Owner decides what team will do
- \* Team decides how it will be done
- \* Role of manager in LeSS:
  - ✓ Remove impediments
  - ✓ Coordinate with senior management
  - ✓ Adapt organization to teams' goals

## LeSS Diagram



## LeSS Pros and Cons

### \* Pros

- ✓ Simple solution for expanding scrum
- ✓ Offers more than just the scrum of scrums approach

### \* Cons

- ✓ Very new and is not used widely yet
- ✓ Not useful to companies not using scrum

## Who Has Used LeSS?

### \* Examples available on LeSS website

- ✓ Alcatel Lucent
- ✓ Ericsson
- ✓ JP Morgan Chase
- ✓ Nokia

## Comparison of Leading Frameworks

Approach	Unique Features	Pros	Cons
Scaled Agile Framework (SAFe)	Agile Release Train, SAFe training and certifications	<ol style="list-style-type: none"> <li>1. Incorporates concept of value streams from Lean.</li> <li>2. Shared resources and Agile release train aid consistent delivery.</li> </ol>	<ol style="list-style-type: none"> <li>1. Rigid compared to other frameworks.</li> <li>2. May not be needed except for very large organizations.</li> <li>3. Adopting may require lots of overhead.</li> </ol>
Disciplined Agile Delivery (DAD)	Architecture Owner, secondary roles as needed	<ol style="list-style-type: none"> <li>1. Oriented around people rather than processes.</li> <li>2. Flexibility in building lifecycles to meet organization needs.</li> <li>3. Emphasis on solutions, not software.</li> </ol>	<ol style="list-style-type: none"> <li>1. Not as popular as other frameworks.</li> <li>2. Finding coaching resources may be difficult.</li> <li>3. Filling secondary roles may be difficult when they are not always needed.</li> </ol>
Large-Scale Scrum (LeSS)	Requirement Areas, dedicated and long-lived teams	<ol style="list-style-type: none"> <li>1. Focuses on pure Scrum and large-scale development.</li> <li>2. Customer-focused solution.</li> </ol>	<ol style="list-style-type: none"> <li>1. Teams and managers may have difficulty acclimating to different roles.</li> <li>2. Not as useful if not using Scrum already.</li> </ol>

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## Conclusion

- \* Agile methodology can increase team productivity
- \* How to carry these benefits across enterprise is less clear
- \* Ask following questions to evaluate needs and outcome:
  - ✓ What is our business strategy and how has agile helped achieve it?
  - ✓ How many projects are planned and how big and complex are they?
  - ✓ How many teams are agile? What is the magnitude of scaling?
  - ✓ What additional benefits are possible at scale?
  - ✓ What are the critical success factors and risks of transition?

***Is it worth the investment of time, money and resources?***

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Questions?





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Training Title	Springfield, MO	Atlanta, GA	Kansas City, MO
<a href="#"><u>Authentic Leadership: Using the Power of Inspiration to Lead Teams</u></a>	Aug 24		
<a href="#"><u>Do More With Less: Deliver Projects Successfully With Only 8 PM Processes</u></a>		Aug 27	
<a href="#"><u>Role of a Product Owner in Driving Agile Projects (1/2 day)</u></a>		Aug 28	
<a href="#"><u>PMP® Exam Prep</u></a>	Sept 01-03		
<a href="#"><u>Agile Fundamentals</u></a>			Oct 26-27
<a href="#"><u>PMI-ACP® Exam Prep</u></a>			Oct 26-28
<a href="#"><u>Leading SAFe® Course (SA training)</u></a>			Nov 02-03

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Online Training Opportunities From RefineM		
Training Title	Instructor-Led Online	Free Webinar
<a href="#">Top 5 Challenges in Agile</a>		Sept 02
<a href="#">Ace Your PMP® Exam: Final Review</a>	Sept 10	
<a href="#">Early Warning Signs of IT Project Derailment</a>		Oct 07

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**Topics include**

- \* **Agile,**
- \* **Project Management,**
- \* **Process Improvement,**
- \* **Leadership and**
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## Next Lunch and Learn

- \* ***Top 5 Challenges in Agile***
  - ✓ What obstacles do teams face when they go agile?
  - ✓ How can you overcome these challenges?
- \* ***Wednesday, September 2, 12:00-1:00 PM Central***

**Register Today - Don't wait for the last Minute**

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## How to Claim 1 PDU for this Webinar?

- \* PDU Category – B, Continuing Education
- \* Program Title – Webinar on “Scaling Agile”
- \* Date Started – Today’s date
- \* Date Completed – Today’s date
- \* Hours Completed – 1.00
- \* Provider
  - ✓ Name – RefineM
  - ✓ Phone # 417-414-9886
  - ✓ Email – [nks@refinem.com](mailto:nks@refinem.com)
- \* PDUs Claimed – 1.00

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## Rewarding Our Loyal Attendees

- \* Anyone who attends 3 Lunch and Learn Webinars in a row is a Star Attendee and is eligible for a prize drawing for a \$10 Amazon gift card.



**Congratulations to the winner!**  
**Stay tuned for our next drawing in September.**

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## SAFe® Certifications

- \* SAFe® Agilist (SA)
- \* SAFe® Practitioner (SP)
- \* SAFe® Product Manager/Product Owner (SPM/PO)
- \* SAFe® Program Consultant (SPC)
- \* SAFe® Program Consultant and Trainer (SPCT)

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## DAD Certifications

- \* Based on “shuhari” system from martial arts
  - ✓ Learn rules and concepts of DAD
  - ✓ Reflect and question why strategies of DAD work
  - ✓ Teach others how to implement DAD
- \* Certifications range from white belt to black belt

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