

RefineM

Transitioning an Organization from Waterfall to Agile

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CEO/Enterprise Agile Coach

www.RefineM.com



Agenda

Section	Topics
1	Introductions and Expectations
2	Why Agile
3	Five Steps Approach <ul style="list-style-type: none">Step 1: Identify Change LeadersStep 2: Perform Discover & Identify GoalsStep 3: Invest in Agile EducationStep 4: Setup for SuccessStep 5: Make the Transition
4	Quiz
5	Conclusion
6	Q&A

Survey Question #1

What are your expectations for this webinar?
Why are you here today?

Go to [menti.com](https://www.menti.com) to answer



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



NK Shrivastava PMP, RMP, ACP, CSP, SPC4, ICP-ACC

CEO/Enterprise Agile Coach @ RefineM since Dec 2011

- Agile Transformation/Coaching (IBM, Charter, Wells Fargo ...)
- Project Management/Process Improvement Consulting
- Project Management and Agile Training
 - ✓ PMP Exam Prep - <https://refinem.com/pmp-exam-prep-course-public/>
 - ✓ PMI-ACP Exam Prep - <https://refinem.com/pmi-acp-exam-prep-course-public/>
 - ✓ Agile Leadership - <https://refinem.com/agile-leadership-course/>
 - ✓ Self-Paced Online Training - <https://refinem.com/self-paced-online-trainings/>
- Products for Project and Agile Professionals
 - ✓ Essential Gear for Project Managers - RefineM.com/products/essential-gear-for-project-managers/
 - ✓ PMP Exam Simulator - RefineM.com/pmp-exam-prep-practice-test/
 - ✓ Agility Assessment Tool - Agility.RefineM.com/
 - ✓ Videos – PMP and Agile - <https://vimeo.com/search?q=RefineM>

25+ years of successful Agile & Project leadership

- ✓ Successfully led hundreds of projects of all sizes using Waterfall and/or Agile
- ✓ Recovered many projects, saved millions of dollars
- ✓ Implemented numerous process improvements
- ✓ Coached/mentored hundreds of PMs and executives
- ✓ Board member of SWMO PMI Chapter (2008-2014)

What's New at RefineM

Upcoming Free Webinar	Date
Effective Hybrid Practices	Jun 15

RefineM Products	Self-Paced Online Training
<u>Essential Gear for Project Managers</u> RefineM.com/products/	<u>Agile Fundamentals Self-Paced Course</u> RefineM.com/course/agile
<u>PMP® Exam Prep Test Simulator</u> Examprep.RefineM.com	<u>PM Fundamentals Self-Paced Course</u> Refinem.com/course/project-management-fundamentals/
<u>Agility Assessment</u> Agility.RefineM.com	<u>Agile BusReqs Self-Paced Course</u> https://vimeo.com/ondemand/refinembusreq
<u>PDU Bundle</u> https://vimeo.com/ondemand/refinempdus	<u>Backlog Grooming Self-Paced Course</u> Udemy.com/course/backlog-grooming-for-agile-requirements/

Survey Question #2

Does your organization currently use Agile?

Vote on [menti.com](https://www.menti.com)

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Why Agile?

Agile is:

The ability to respond to change, in order to succeed in an uncertain and turbulent environment

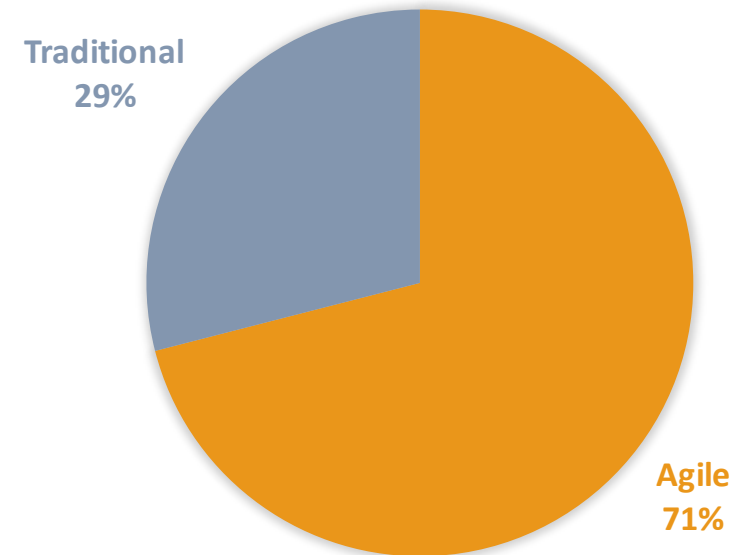
Agile can Improve:

- Customer experience
- Flexibility
- Product quality
- Productivity
- Team morale
- Project visibility

Agile can Reduce:

- Risk
- Scope creep
- Time to market

ORGANIZATIONS USING AGILE (AT ANY LEVEL)



Agile companies generate 30% higher profit, and 37% higher ROE

<http://ebusiness.mit.edu/ciosummit/weillslides.pdf>

5 Steps to Transition an Organization from Waterfall to Agile

01

IDENTIFY
CHANGE
LEADERS

- Identify a willing and committed Agile leader within the company to lead the transformation.
- The leader may bring in an experienced Agile coach to guide the transformation.

02

PERFORM
DISCOVERY &
IDENTIFY GOALS

- Discovery led by the Agile leader and/or Agile coach to identify needs, goals and roadmap.
- Co-create a fit-for-purpose Agile operating model based on discovery outcomes, including required tools and metrics.

03

INVEST IN AGILE
EDUCATION

- Provide Agile education to leaders, middle managers and teams.
- Collaborate to refine operating model developed in step 2.

04

SETUP FOR
SUCCESS

- Implement operating model with the methods and tools that best fit each team.
- Identify Agile champions for each team to sustain the new WOWs.
- Start collecting, analyzing and reporting metrics.

05

MAKE THE
TRANSITION

- Provide extensive coaching to the team focusing on answering “Whys” behind “Everything”.
- Mentor and support Agile champions to sustain the new process and new WOWs.

According to the Project Management Institute, 71% of organizations are using Agile in some capacity. This is because Agile provides more flexibility and several benefits. Agile project management can make teams more productive, it can improve the customer experience, and the quality of products, among several other benefits.



Step 1: Identify Change Leaders

Internal Change Leader

- Willing to lead the change
- Committed to the change
- Knowledgeable about Agile

Agile Coach / Consultant (Optional)

- Experience with organizational change
- Comprehensive understanding of Agile
- Extensive coaching skills

Step 2: Discovery & Goals

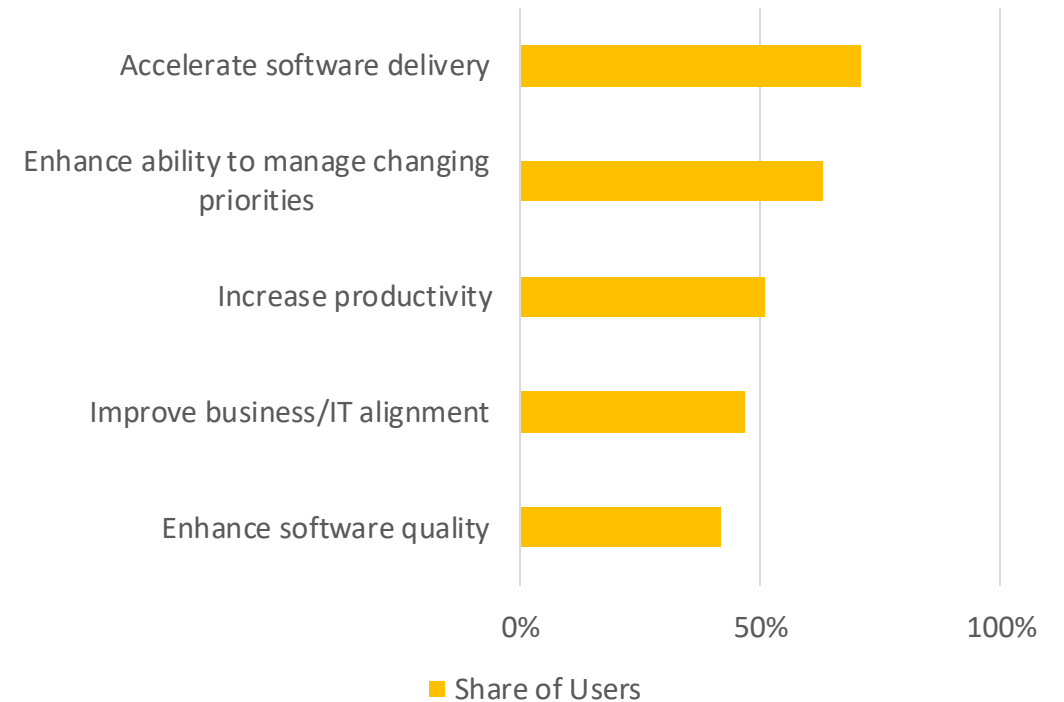
Discovery by Agile leader and/or Agile coach

- What is vision for Agile for your team/organization?
- What goals you want to set to achieve that vision?
- What is the roadmap to achieve those goals and vision?

Co-create a fit-for-purpose Agile operating model

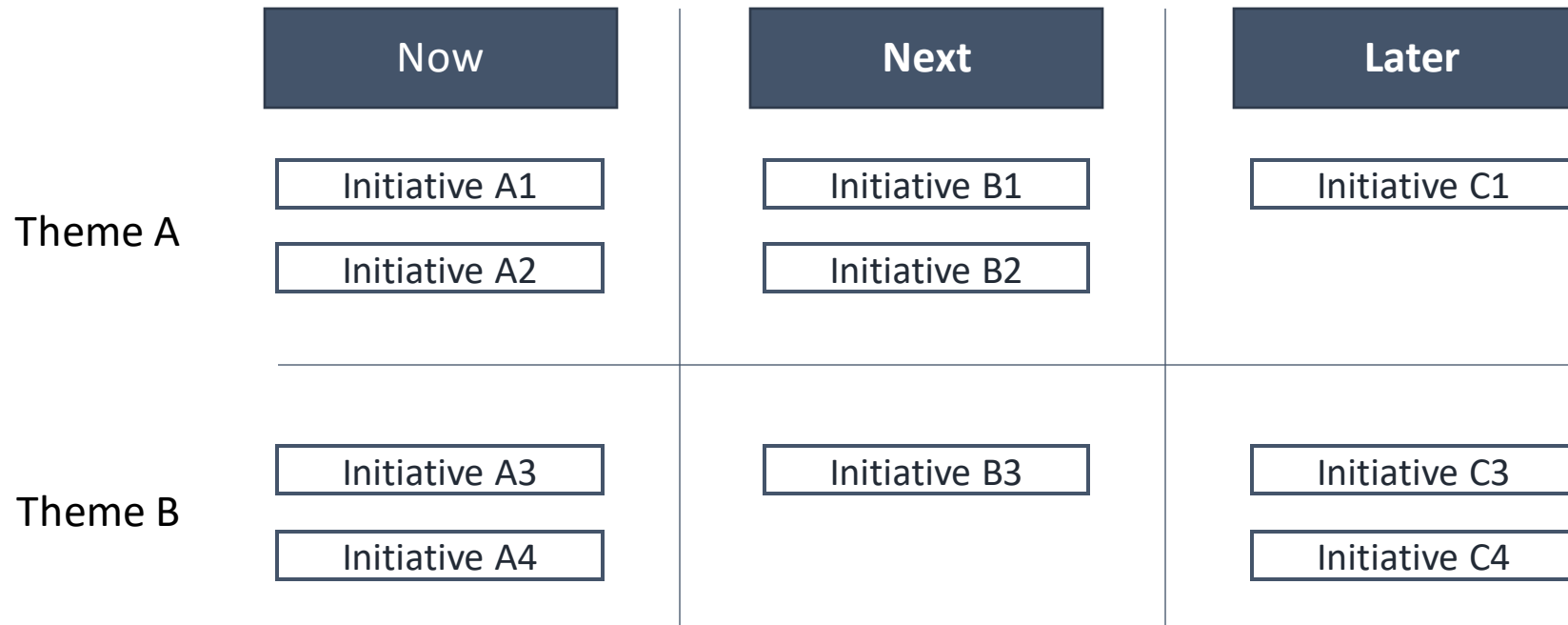
- Based on discovery outcomes,
- Including required tools and metrics,
- So, you know how to get there

Top Five Reasons for Adopting Agile



Step 2: Roadmap

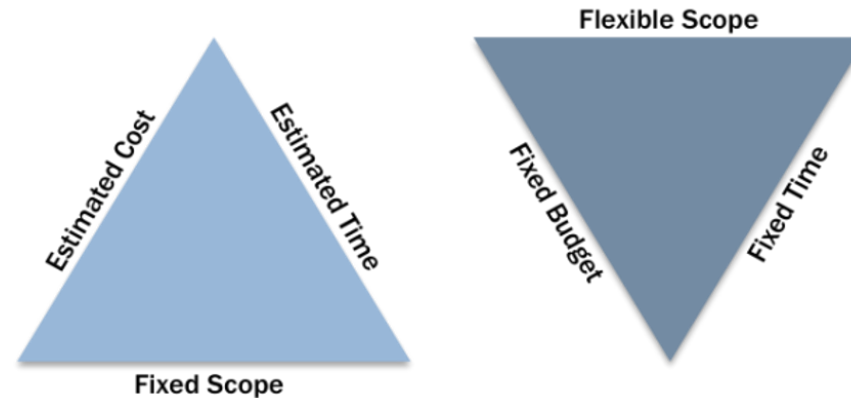
Creating a roadmap for reaching the product vision



This gives your team a good place to start and a visualization of how each iteration contributes to the end goal.

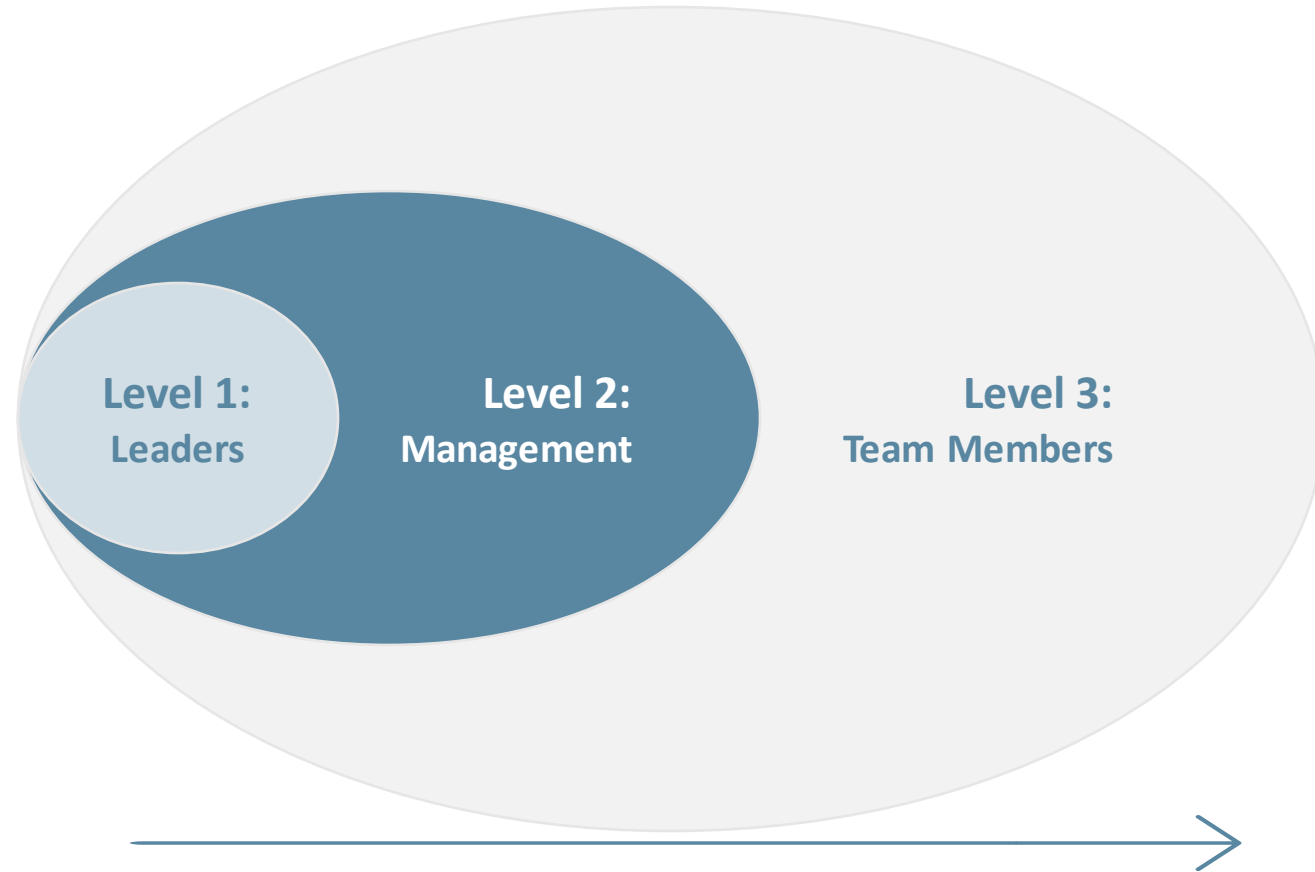
Step 3: Invest in Agile Education

1. Educate leaders, managers, and team members on Agile mindset, methods, and tools.
2. Collaborate to refine operating model developed in step 2



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

Step 3: Invest in Agile Education

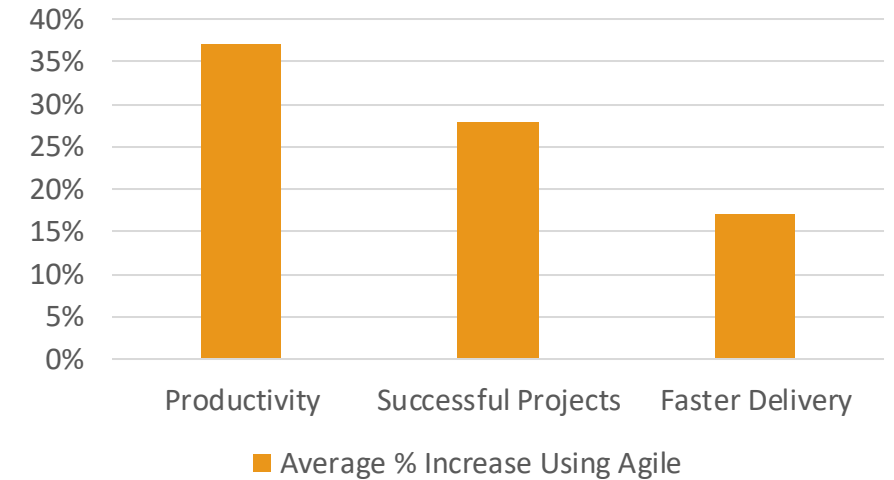


- | Level 1: | Level 2: | Level 3: |
|--|--|---|
| <ul style="list-style-type: none">• Goal setting & roadmap creation• Agile training for leaders | <ul style="list-style-type: none">• Refine goals and roadmap• Agile training for management | <ul style="list-style-type: none">• Implement Agile to achieve goals• Agile fundamentals for teams |

*Small-medium organizations may only need level 1 & 3

Step 4: Setup for Success

- Implement Agile operating model with methods and tools that best fit each team
 - Ex. Scrum may work best for one team, but not meet the needs of another
- Identify Agile Champions for each team to sustain new WOWs
- Start collecting, analyzing and reporting metrics



Step 5: Make the Transition

- Extensive coaching
 - Let the team realize their potential
 - Help them understand “why” behind “everything”.
- Mentor and support Agile champions to sustain the new process and new WOWs



Quiz

Go to [menti.com](https://www.menti.com) to answer



Top 2 Winners get free access (100% discount) to one of RefineM's products of their choice

1. Essential Gear for Project Managers (\$89)
2. PMP Exam Prep Simulator – 3 months (\$100)
3. Agility Assessment – 3 months (\$99)
4. PDU Bundle - 2 months (\$98)
5. Self-Paced Online Course (\$100 each)
 - Agile Fundamentals, or
 - Project Management Fundamentals

Survey Question #3

What topics would you like to see in future webinars?

Vote on [menti.com](https://www.menti.com)

Conclusion

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Training Opportunities from RefineM

Agile Courses	Online
<u>Dashboard in a Day with PowerBI</u> *Guaranteed to run	April 26
<u>Backlog Grooming for Agile Requirements</u>	May 26
<u>Business Requirements for Agile Projects</u>	May 19
<u>Agile Fundamentals</u>	May 16
<u>PMI-ACP® Exam Prep</u>	May 16
<u>Agile for Waterfall/Operational Work</u>	May 26
Project Management Courses	Online
<u>PMP® Exam Prep</u>	May 6
<u>Project Management Fundamentals</u>	May 9
<u>Recipe to Deliver Projects Successfully</u>	May 5
Leadership Courses	Online
<u>Agile Leadership</u>	May 11
<u>Leadership Skills for Project Managers</u>	Jul 28

How to Earn 1 PDU for this Webinar?

1. Log in to ccrs.pmi.org and Click on “Report PDUs” link.	
2. Click “Courses and Training” and Input the following:	
PDU Claim Code	399077LST1
Activity Name	<i>“Transitioning an Organization from Waterfall to Agile”</i>
Provider	“RefineM LLC”
Date Started/Completed	April 20, 2023
Contact Person	NK Shrivastava
Contact Phone	(417) 763-6762
Contact Email	Trainings@RefineM.com
PDUs	1.00 Business Acumen.
3. Check “I agree this claim is accurate” box and then Submit.	

**Please claim your PDU by end of June 2023.
Claim code will expire after that date.**

Questions?

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