

AGILE IMPLEMENTATIONS:

LARGE-SCALE ROLLOUT

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This white paper comes as a result of a PMI UK Agile Community of Practice workshop held at Shell Trading & Shipping Company in November 2013 which brought together representatives from a wide variety of well-established, globally recognised businesses to explore some of the common challenges and successes with the large-scale rollout of Agile - like any organisational change, it is clear that an implementation of this type is not without its challenges. Equally, the solutions and success stories will no doubt serve to help many others in their quest to embed Agile best practice across an entire organisation.

Almost 50 attendees took part and were split into six teams, each of which used the format of a typical Agile retrospective – looking at the good, not so good and things that people were still having difficulties with and for which, they needed answers on how to resolve.



Figure 1 A word cloud of the challenges that the participants were facing

As figure 1 alludes, many challenges were raised, most notably around the acceptance from people and teams that really embracing Agile requires significant effort and a notable mindset shift to embed firmly and effectively within an organisation. Simply saying “we’re doing Agile” isn’t enough; an effective implementation requires a driven and for a large part, a methodical change plan. Some teams reported success via the implementation of a *Centre of Excellence*, through which the Agile transition would be coordinated, tracked and pushed to the point of initial completion - combining this with an internal certification, as Shell have done successfully, will help ensure that people have undertaken the necessary training, have the right competencies and for their personal benefit have tangible recognition for their understanding. This generates the enthusiasm for people to really buy-in, by making it something they can benefit from personally.

“The business will talk the talk but often fail to walk the walk”

‘Buy-in’ is a broad term. Buy-in from those on the ground and directly involved with agile delivery day-to-day is clearly crucial but while small groups can generate momentum amongst peers, the senior-level sponsorship and support amongst function heads came across as a non-negotiable element of some of the more successful implementations. If any department of an organisation that contributes to the delivery of software is not briefed, trained, has adapted to and is supporting of agile processes and principles, there is a strong chance of unnecessary delays, or even complete failure to deliver. We heard several concerns about the ‘cross-business suitability’ and whether or not teams could be truly independent when they need to rely on ‘shared’ resources in more traditional functional units such as Finance, Marketing, and Support, for example. Complimentary to this, there were reports of issues outside of a team’s direct control that prevent true agility and that ‘capability teams’ – those including, but not limited to, those mentioned above are often not trained or even aware of what agile actually is. Clear understanding and ownership at a very senior levels, people who are responsible for these functions, has proven to break down some of these barriers and turn seemingly less flexible teams into ones that can adapt to an agile team’s needs (finance representatives attending stand-ups and planning sessions for example). Whilst the buy-in at senior levels will create the platform for success, this needs to be complimented with a very focused and enthusiastic coaching effort, starting with basic principles, for getting less Agile-aware members of an organisation comfortable with the notion of Agile. When coaching in organisations fresh to Agile, starting small and using pilot teams has demonstrated clear success – creating a blueprint of how things should be done and providing confidence and reassurance to other teams that a change of this nature is often for the better. Cementing understanding as the change plan progresses with the certification mentioned earlier is a tangible demonstration of progress of how the organisation is slowly but surely adapting to the new methodology. Adding agile participation and adoption goals to personal objectives was also reported to have helped changed people’s mindsets.

When it came to managing 3rd parties or vendors, some good ideas were raised for educating and integrating them into the agile delivery process at an organisation. Mixing groups of people from different sites, aligning iterations and using video-conferencing and screen-sharing technologies for stand-ups and planning were all reported as having been successful. Online scrum boards, viewable to any team, anywhere, at any time promote visibility of what each team is doing and what issues (on which stories) they are having problems or issues.

“Not all eligible departments want to adopt”

Leading on from coaching and proper training, there were several examples reported on how individuals playing Product Owner, a critical role, were reluctant to do so and were indecisive with prioritisation or being clear on exactly what they wanted the team to do – this caused unnecessary delays and poor team morale. On the flip side, there were positive reports about how making 100% sure that Product Owners were dedicated to one product could really drive dedication and passion for that product to evolve with the help of the delivery teams around them. Again, there is clearly no single solution for what it takes to implement Agile principles successfully but the collection of learnings from this session would give a very great chance of success.

While the importance of getting the mechanics of ‘how to do’ Agile correctly came across frequently, the overriding factor around the room was clearly the people element. From buy-in, to education, to empowerment and working on cultural change all far outweighed the need for alignment with the textbook implementations of the agile methodologies. Business-wide adoption is really what is needed and several of the twenty or so organisations represented here were starting to see that. In particular, Shell and Jaguar Land-Rover had started to see end-to-end success and agility which had begun to pave the way for improved senior management support and sponsorship for wider Agile adoption and an acceptance for seemingly lowered sense of control and governance. Although in reality, this isn’t true either, the speculative Project Initiation Documents and project plans of forecast deliverable dates and costs to completion have only proven to hide the often realised risks of projects going off track against one or all of their scope, cost and time baselines.



Figure 2 A word cloud of the solutions to common challenges that the workshop participants found to be beneficial

Not only did we hear a lot about how to start on the journey of large-scale Agile rollout and the key ingredients but also, once at a stage of early maturity, how to scale further and wider with the goal of reaching optimal saturation across the organisation. Communities of practice were a big deal. Individuals can direct a team but teams run the business. Establishing these cross-business representatives to share stories of successes and challenges and ensure consistency in process is key to scaling an agile implementation. The danger without these is obviously to repeat mistakes, implement different styles of Agile and make moving of people between teams slow and clumsy and cement bad habits in the new 'best' practice.

WHERE DO PROJECT MANAGEMENT SKILLS FACTOR INTO THE LARGE-SCALE ROLLOUT OF AGILE?

Practicing Agile does not mean we can afford a lack of discipline in delivering a project's objectives. In fact, with the delegation of spend, scope and time controls to the Product Owner, Scrum Master and team, there's even more impetus on ensuring stakeholders are well-briefed, and regularly, or at least have access to information that will provide confidence that the project is under control when it is reported as such and how far behind it is when not. Reviewing progress against checkpoints ('value checkpoints') and undertaking critical path analysis at regular intervals, outside of iterations or sprints, were deemed important 'traditional' project management skills to maintain in the new Agile era. Risk and issue management, bringing together senior stakeholders and ensuring regular involvement of functional or 'capability' teams again, were still deemed to be very necessary.

In addition to the application of traditional project management skills, the inherent nature of a typical project manager was also deemed to be more than useful in executing the change plan itself. Organisation-wide, often cross-continent rollout of Agile and the cultural and process changes therein requires discipline, co-ordination and meticulous attention to detail on how the change is progressing and where the current challenges are. Project managers from around the room were, and still are, all central to this change at their respective organisations and often seen as the passionate, enthusiastic champions for such a change across the entire organisation. Of course, there was an appreciation for 'departmental champions' in teams such as Technology or Development who will largely tend to focus on the pure software build agility – developing quickly and demonstrating and making releases available regularly. Note: *making them available*, does not mean deploying teams are always lined up to receive these at the same rate. Interestingly, while the transition to true Agile is in flight, pre-booking release slots was seen as smart way for avoiding lags in getting something live or even missed release opportunities until the deployment to Production environments is seamless and complimentary of even daily or intra-day releases.

“Project management discipline is still a key ingredient”

CONCLUSION

First and foremost, bringing together such a talented and experienced group of people such as those who attended this workshop can move on the understanding of a topic by months in single day – many of which have experienced similar issues and had no benchmark to measure against to know if this was normal or whether they have hit a problem that others are struggling to resolve themselves. While there are clearly still 'puzzles' – things such as how you *really* get people to change behaviors - is there even a single correct answer? How you gain

support from senior stakeholders, often more traditional in management and reliant on the accompanying project artefacts and how exactly traditional project management intertwines with agile methodologies are all topics to be progressed in the near future but what is clear from this session is that while the theory is very well understood, it is really the change itself – the **business-wide cultural and behavioral changes** - that really need the time, effort and detailed co-ordination to realise true large-scale agility.