

---

# Agile Adoption and Case Studies

---



Unit #1 - PRESENTATION

Let's start by introducing our first set of learning objectives

What are the key learning points for the first part of this unit?



**Not sure where to find this?**

Browse the course introduction section and expand the learning objectives tab to discover all of them.

Review Learning Objectives



# Discuss Leadership Effectiveness for an Agile Organization

The annual **State of Agile survey** provides valuable insights into the application of Agile across different areas of the enterprise. The report reveals that the top reasons for adopting Agile has evolved from reducing costs to reducing risks, which indicates a better understanding of Agile values and principles.

However, challenges associated with adopting and scaling Agile remain organizational resistance and not enough leadership participation.

( Reference: <https://stateofagile.com/>)



# Leadership Support from the Top

Re-aligning organizational culture with new values requires leadership support from the top. Executives at the top must adopt a new mindset, a less hierarchical approach, valuing peer relationships, helping teams making decisions, and understanding **servant leadership**.

Leaders have to modify their views on collaboration, understand failure as a learning opportunity, cultivate relationships, and appreciate others' contributions in the decision making process.

Then, Agile adoption requires people at all levels of the organization to adopt new ways of working together. The change is profound and old habits may be hard to part from.



# Outdated Leadership Create Barriers to Adopt Agile



Some leaders may continue to practice the “command and control” approach and expect to tighten their grip on teams using Agile metrics. Because this attitude is not aligned with Agile values, it will make any adoption attempts to fail.

Such leaders are not yet ready for organizational cultural change because they do not question the executive and middle management leadership style.

However, a shift in mindset has to happen at the top and the middle as well, starting with an emphasis on collaborative work, focusing on collective intelligence, creating a safe environment to innovate, and rewarding value creation.

# A More Human Kind of Leadership

In a process-driven organization, executives have to let go of the old way of organizing work. They must work at building the cultures that create better products for customers.

Klaus Schwab, the World Economic Forum founder, explains: "We need leaders who are emotionally intelligent [...]. They'll coach, rather than command; they'll be driven by empathy, not ego. The digital revolution needs a different, more human kind of leadership."

(Reference: <https://www.agilealliance.org/agile-methods-are-no-match-for-outdated-leadership/>)



# Develop Trust internally and Externally



---

Teams are at the heart of Agile Transformation. They are cross-functional and self-organized: a set of diverse team members get together to make the best decisions to complete the work required to satisfy customers.

Management's role is shifting from making decisions to listening and responding to the needs of teams. Their role is coaching and attending to teams' performance.

Management who do not trust their team will impact their morale, resulting in underutilized brain resources, and lost opportunities.

---

# Long Lasting Change



---

Agile development is not a set of instructions. It is a mindset. A new set of best practices will guide team leaders and team members, but to impulse change that is deeply rooted and will sustain over time, the organization as a whole must adopt a new mindset. The conventional reward system, recruitment criteria and vendor contracts need to be addressed.

The new way of working requires all individuals in the organization to find their unique place in teams and learn how to contribute in new ways.

(Reference: <https://www.cio.com/article/2433819/7-agile-leadership-lessons-for-the-suits.html>)

---



# The Evolving Role of Project Sponsor (tbc)

Project Sponsors are the initiators of a project. They are also the individuals who have kin in the game, as they have a vested interest in the project's outcome.

In traditional project management, project governance and sponsor role is often limited to the initial project phase. Then a project manager takes on the duty to follow up on project progress. The project sponsor becomes more or less disconnected from what is actually going on during the project development phase. Some project sponsors could disengage entirely and wait for the outcome while busy at other 'executive-level' tasks.

However, the level at which a project sponsor operates allows him or her to see the whole picture. They would know better the various standpoints of the multiple project stakeholders. Some projects operate in a Waterfall in an organization in the process of adopting Agile. The sponsor can help to find the right place to mix both approaches.



# The Evolving Role of Project Sponsor (cont'd)

In the Agile mindset, the project sponsor is part of the team. He contributes with his skills and knowledge.

Therefore he would no longer 'delegate' it all and will be giving time to team members. He will be involved during the project development, facilitating decision-making, educating others, and explaining how the project is connected to the organizational strategy.

The project sponsor should support the team in many ways. As an executive-level individual, he has access to resources and can envision the necessary trade-offs inevitably occurring for complex Agile projects.

He could even bring his wisdom to find paths to simple solutions, the Agile way.



Unit #1 - PRESENTATION

Article licensed

# Now that we have introduced some key concepts, let's discuss a first challenge

The article provides thinking points about typical challenges faced in the context of this unit's learning objectives.

The article "The Path from Operational Agility to Strategic Agility" is an excerpt from: **The Age of Agile: How Smart Companies are Transforming the Way Work Gets Done**, authored by Stephen DENNING.  
Published by Amacom, ISBN 9780814439104



To download the article, click on the button "Article" located just **below** this presentation. Look for the active panel such as this:



# How is your reading doing? Did you take some mental notes of the key points discussed by the author? Could you tell a colleague about this article?

1

## Highlight Key Words

As you read the article provided, take note of the concepts and ideas that you already know well and make a pause to reflect on those that are newer and require some processing.

2

## Translate to Your World

How is your organization doing with the concepts presented in the article? Could you be an agent of change to try to implement more modern practices in your work environment?

3

## Write a Summary

Retain the essential points by writing a summary with your own words. This will encourage you to read thoroughly and get ready to answer the questions presented next.



Ready to answer questions



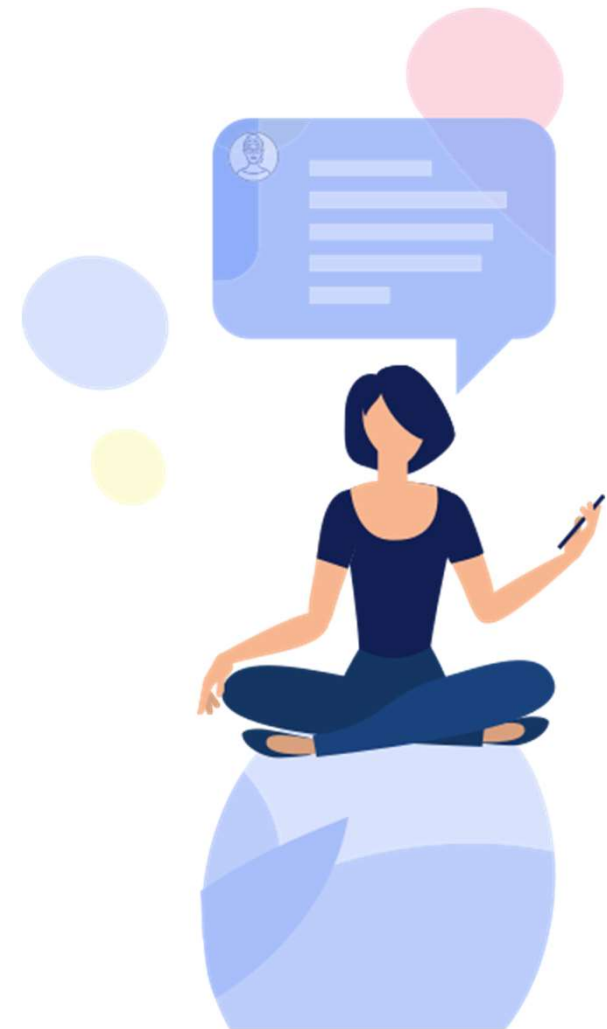
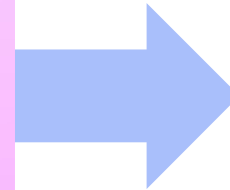
### --- QUESTION #1

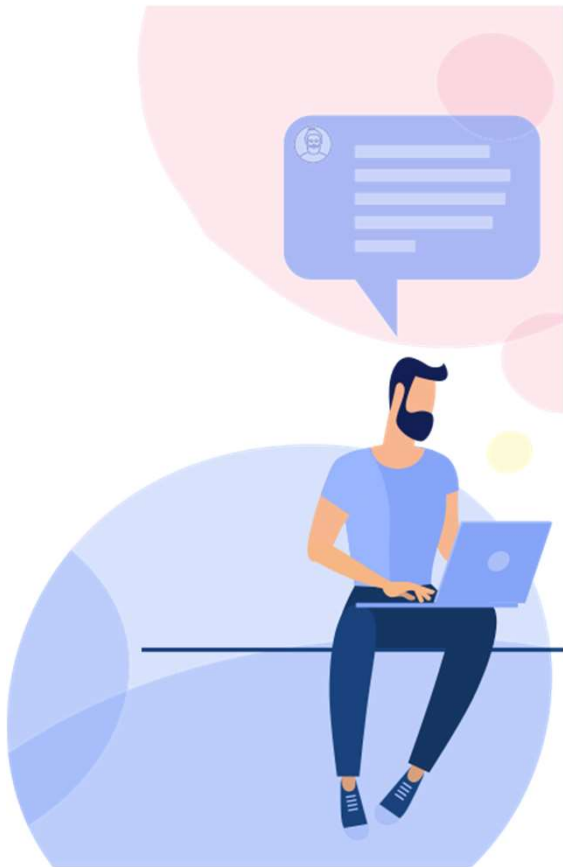
When Agile teams perceive tensions between the way they organize work and how the other parts of the organization operate, the author explains that executives should be careful to state they have reached the highest Agility level. If not, what could happen?



### --- Answer #1

When a firm disingenuously states, “we are already Agile” and does not consider the existing tensions, they miss out on an essential and critical disconnect. Operation agility at the unit level is not sufficient, according to the author. Even though the enterprise has been able to evolve with efficiency gains, quality improvement is still slow. As a whole, the firm still experiences “strategic immobility” and has not achieved “Agile” at the enterprise level. The firm will be missing out on strategic Agility.





## --- QUESTION #2

According to the book's author, the "full gains of operational Agility only come when the whole firm embraces Agile management."

Did you experience this in your organization? Do you agree with this statement?

## --- Answer #2

The author describes how organizational Agility is not just about growing to perform Agile teams. But, it also involves breaking the top-down bureaucracy and maturing into developing market-creating innovation abilities. Using figures 6-2 and 6-3, he contrasts the disconnect of "Strategic Agility" still happening when operational Agility is matured only at the team/unit level. At this stage, innovative initiatives even come from the top with insufficient input from the operational teams. On the contrary, at the highest Agility level, the diagram shows strategic Agility flows from the operational changes. Therefore, significant efficiency and quality improvement gains lead to market-creating innovation naturally and sustainably.

# In this second part, from waterfall to Agile, we will look into tools and approaches for organizational change.

1

## Organizational Change

Completing the transition from Waterfall to Agile requires a major cultural transformation. What strategies could firms take? Some start small with a pilot project (important and visible) to impulse change. Others go big, starting with training in Agile mindset to initiate the change.

2

## Teamwork and Collaboration

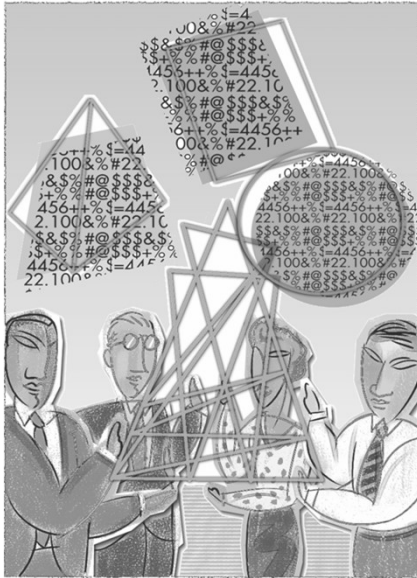
Each iteration brings new ideas on how to deliver increments. Starting from estimating no longer happening in days, but rather in story point invite more team collaboration. For example, by using planning poker, all participate with less stress.

3

## Agile Communication

Cross-functional teams get to learn about other contributors, value, and respect their work. Customer centricity brings opportunities for listening and talking to the product's users. Communication is a soft skill, and training is often required in this area.





## CONCEPT CARD 1/3



### Leading Organizational Change

Going full in? Or starting small? Whatever the **strategy** selected, some steps are critical to succeeding and ease resistance to change.

The first is investing in **training**. Whether it is a pilot project, a business unit overhaul, or an entire organization's initiative, participants to the change need to learn and receive a solid education in Agile values, principles, and Value-driven development.

An organization could decide on the **right projects** to champion an iterative approach to development but still keep waterfall aspects elsewhere. However, clear **communication** with all stakeholders is a critical success factor.

Finally, most organizations hire an external **consultant** to lead the first stage of change. This Agile coach has knowledge and skills of Agile methodologies. The idea is preventing most pitfalls an organization could struggle with and facilitate a faster and less painful transition.

#### SUGGESTED READINGS:

The 8-Step Process for Leading Change - Dr. Kotter  
<https://www.kotterinc.com/8-steps-process-for-leading-change/>

4 Ways To Ease The Transition From Waterfall To Agile  
<https://www.forbes.com/sites/insights-scrumalliance/2018/11/01/4-ways-to-ease-the-transition-from-waterfall-to-agile/?sh=722efa30a6fd>





## CONCEPT CARD 2/3

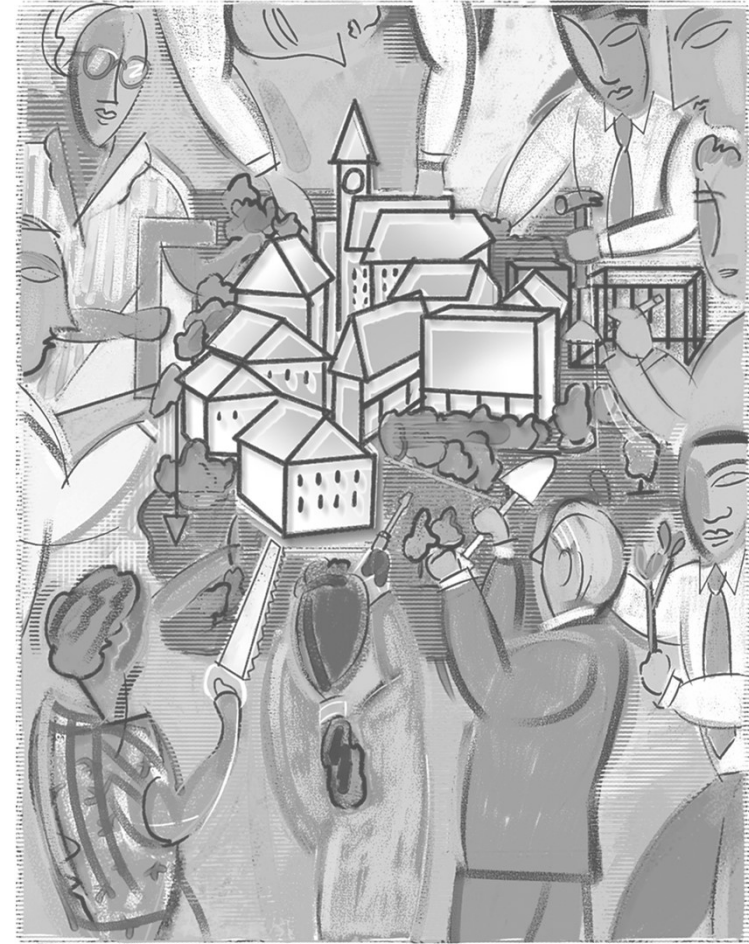


### Teamwork and Collaboration

Effective collaboration among team members means that each individual understands who is doing what and when. Breaking down projects into epics, themes, and **user sorties** help develop a **shared** understanding of requirements.

Waterfall teams tend to work in functional silos instead of cross-functional Agile teams that host **diverse skillsets** and different ways of working. Using **story points** provides a common tool to estimate tasks and performance metrics such as team velocity.

Although the Agile manifesto advocates collaboration through **face-to-face** communication, most teams face the challenge of remote work and distributed teams and have to rely on online **collaboration tools** to share artifacts. If the project team is small, it could be beneficial to bring the entire team together for some up-front project activities. Brainstorming sessions could also be initiated to address **creativity** issues and give time to specific problem-solving



## CONCEPT CARD 3/3



### Agile Communication

**Communication** in an Agile organization is critical even more so than in a traditional project because there are more moving pieces. Team members need to be aware of changes as they occur daily.

As distributed teams become the **new normal**, adapting communication for remote teams is critical to managing conflicts and negotiations. Management needs to address communication challenges, such as time and cultural differences. **Soft skills** are essential, as well. Providing the right tools and training is vital to help teams work.

**Remote meetings** will benefit from the same tools as conventional in-person meetings, such as setting and communicating an agenda, encouraging active participation from all. Also, telling participants how to mute, un-mute with the video conferencing tool and asking someone to monitor the chatbox will prevent awkward noises and unanswered questions..



Practice Exercise



### BOOK EXCERPT

The book excerpt (coming next) discusses more specific concepts about communication, differentiating between traditional and Agile.

After reading through this excerpt, we provide a short learning activity where you will engage into a conversation exercise (with three sets of questions and answers) to solidify understanding of this important topic.



Unit #1 - PRESENTATION

Article licensed

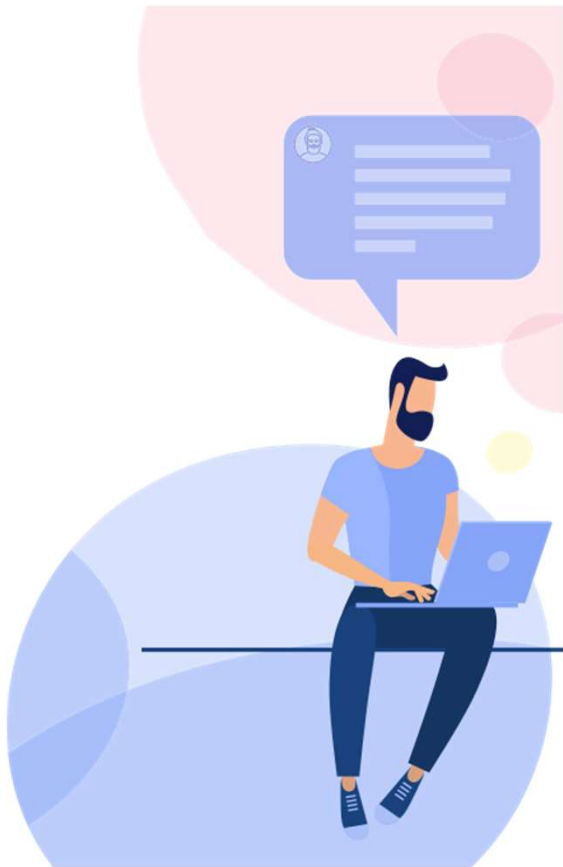
# Let's move on to discuss a second book excerpt more in depth as we continue on to explore key concepts.

The article provides thinking points about typical challenges faced in the context of this unit's learning objectives.

The article "What's Different about Agile Communication?" is an excerpt from: **Agile Project Management For Dummies**, authored by Layton, Mark C. ; Ostermiller, Steven  
Published by Wiley, ISBN 9781119405733

To download the article, click on the button "Article" located just **below** this presentation. Look for the active panel such as this:





### --- QUESTION #1

Project communication is critical for both Agile and Traditional Waterfall approaches. Agile communication sets a different tone and gets team members to focus and prioritize on different pieces due to the Agile values and principles. What are the critical differences related to meetings, documentation, and in-person conversations?

### --- Answer #1

First, as explained by the author, the conversation's tone will be "emphasizing simplicity, directness and face-to-face conversations." Team members are encouraged to have in-person talks to voice their opinion and discuss problems. Then, there is a desire to prevent the building of extensive written documentation as it is difficult to maintain with changes. It is more valued to 'show' than 'tell' in a lengthy description. Visually conveying artifacts is encouraged. Again, the principle of simplicity governs communication through artifacts containing just enough information to carry on work. Finally, although team members will still assist in meeting, coordinating work, and communicating on how to organize work together, these meetings are time-boxed. Their duration is limited to prevent wasting time in lengthy never-ending meetings that do not enhance productivity.

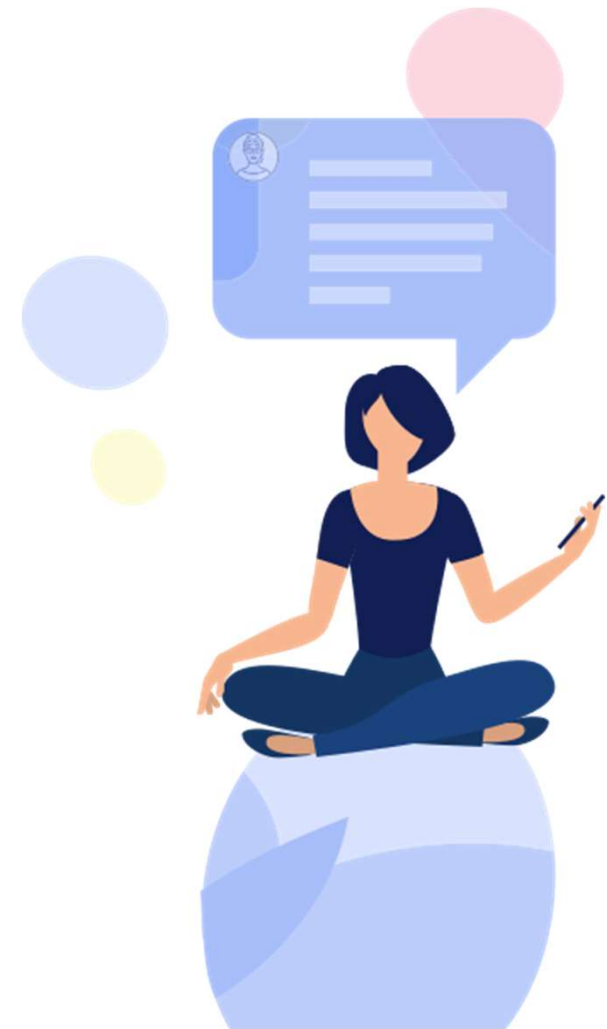
### --- QUESTION #1

The effectiveness of face-to-face conversation is at its best with 2 people at a whiteboard and on the phone/visio but significantly reduced with 2 people by mail. The author emphasizes: "Agile provides a format for written communication that is structured but not cumbersome or unnecessary." What are the key differences?

### --- Answer #1 (part 1 - to be continued)

As per the book author, Agile introduces 13 communication channels:

1. **Project planning:** meetings for that purpose are have desired outcomes and structured to be concise and time-boxed.
2. **Product vision statement:** a critical component that clearly communicates the end goal of the initiative, made visible and understood by all, not just executives.
3. **Product roadmap:** indicates the long-term view of the product features, which are likely to be part of the project, but they could still evolve.
4. **Product backlog:** this is the tool to manage the project's scope, what will be done, and what will not be done. In Agile Scrum, the product owner prioritizes stories to provide direction to the development team.
5. **Release plan:** the goal of each iteration is to produce a potentially releasable increment. This plan provides clarity on the process to go live.



### --- QUESTION #1

Let's continue to review the critical project management communication channels for an Agile project. These tools are there to assist and guide people to interact and succeed in their communication. People and interactions come first. Tools are second. Flexibility in using tools is, therefore expected.

### --- Answer #1 (part 2 /2)

Let's see more as we continue with: (read the authors' details in the book excerpt)

6. **Sprint backlog:** provides a status of work in progress during the Sprint. A burndown chart can provide a useful visual complement.
7. **Task Board:** visuals located close to an Agile/Scrum team.
8. **Daily Scrum:** a verbal time-boxed conversation to coordinate work among team members and identify impediments and issues with dependencies.
9. **Face-to-face conversations:** the most essential critical tool!
10. **Sprint Review:** a time-boxed event to show key stakeholders the released (or soon to be) increment in action. An opportunity to capture early feedback.
11. **Sprint retrospective:** a time-boxed event that identifies areas of improvements. A critical tool for cross-functional self-directed teams to learn together.

12. **Meeting Notes:** Retain shared information and capture action items.

13. **Collaboration Solutions:** could be used to keep/update records of



## --- QUESTION #2

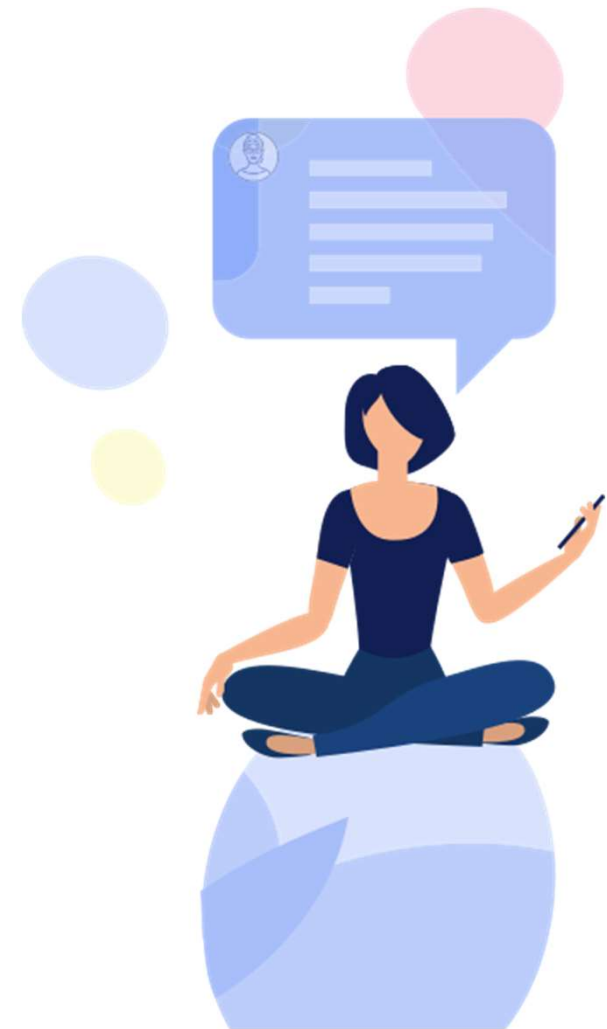
There is still a need for reporting progress status to project stakeholders (including the project sponsor). This is done quite differently in an Agile setting and is based on the definition of 'done.' The report will list all 'done' tasks and user stories. In contrast, in traditional projects, there is percent progress but no working functionality.

## --- Answer #2

There is no percentage of progress communicated since the project scope is not entirely set in stone yet. However, stakeholders could receive all functionalities described by user stories that are considered 'done' if they wish to. To simplify the reporting process, no additional tool is required to communicate progress other than the ones used for organizing work and already existing.

The author describes a common pitfall for organizations transitioning to Agile. Sometimes traditional and Agile approaches co-exist, and there is a demand from executives and stakeholders to receive classic project status while all agile artifacts are already produced. This is 'double work' and should be avoided through proper education.

Finally, project managers can use a burndown chart (such as available with Atlassian Jira tools). It provides a simple visual of what is going on. The authors show 6 typical diagrams and the situation they describe: expected, more complicated, less complicated, not participating, lying, failing fast... Keep them in mind!



# Let's wrap-up this presentation

That's it for now!

This review of concepts and common terminology should help you clarify the new Agile culture and how your team applies essential concepts.

Let's wrap-up this presentation!

Please keep in mind the critical points that were discussed when attempting the intermediate and final quizzes.

