

Scaling Agile and Lean Practices

What the Frameworks Leave Out

A look at culture, practices and organizational development

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Certifications

SAFe SPCT

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Checking In



Version 1 – State of Agile

- Ninety-four percent (94%) of all organizations surveyed now practice agile.
- In 2013, the majority of respondents had fewer than 1,000 people in their software organization.
- But in 2014, approximately 35% of respondents had more than 5,000 people in their organization, and 20% worked in very large organizations with more than 20,000 people.

Version 1 – State of Agile

According to the data - Tips for scaling

1. Consistent process and practices (42%)
2. Executive sponsorship (40%)
3. Implementation of a common platform across teams (39%).

Consistent Process and Practices

Agile Scaling Knowledgebase™ (ASK) Decision Matrix public version 5.0								
Key: Low = Light Pink Med = Blue High = Purple								
Approach Comparison								
Aspects / Criteria	Scrum-of-Scrums (SoS) PO meta-scrum	Large Scale Scrum (LeSS) Larman/Vodde	Scaled Agile Framework (SAFe) Leffingwell	Disciplined Agile Delivery (DAD) + Agility at Scale Ambler/Lines	Spotify "model" (Tribes, Squads, Chapters & Guilds) Kniberg	DSDM Drive Strategy Deliver More	Recipes for Agile Governance (RAGE)	Scrum at Scale Sutherland/Brown
Used typically by what organization types?	Any that are running Scrum	Has 2 suggested structures for different size organizations	Focused on enterprises	Used in many diverse organizations	Only intended for Spotify - perhaps fits other relatively flat & agile orgs	Mature Complex Organization	Adapts to any size. There is no typical organization.	Adapts to any size. There is no typical organization.
Key point of focus (team/structure/enterprise/ROI)	team/structure Inter-team dependencies	team/structure Agile thinking, PO scale and structure	team/structure A customizable but prescriptive framework for most aspects of Agile at scale.	team/structure Larger project stages; Technical process gaps for craftsmanship at scale	team/structure Very agile scaling with little overhead; team affiliations; cross-team concern handling	team/structure Communication Paths collaborative teams	Focus is on Patterns that can be used based on the need of the team program or enterprise	Billed as a "Model" Scaling approach
Software centric or often used outside of SW or IT	Could use anywhere you use Scrum		Focused on Software or SW/HW	Has been used outside of IT	Spotify only	Has been used outside of IT	Focused on Software	Could use anywhere you use Scrum
Key Positives / Differentiators	simple, standard Scrum focus on dependencies & resolutions	Good PO scaling; strong principle alignment, Non-prescriptive - gives "suggestions"	The "big picture" and completeness; getting Agile "in the door" at large corporations; actively evolving.	Lots of content; strong in areas such as architecture, design and dev ops; incorporates many good models.	very agile, entrepreneurial, distributed teams, low overhead	Very established following in the UK	Fluid and adaptive	Lightweight approach authored by J. Sutherland

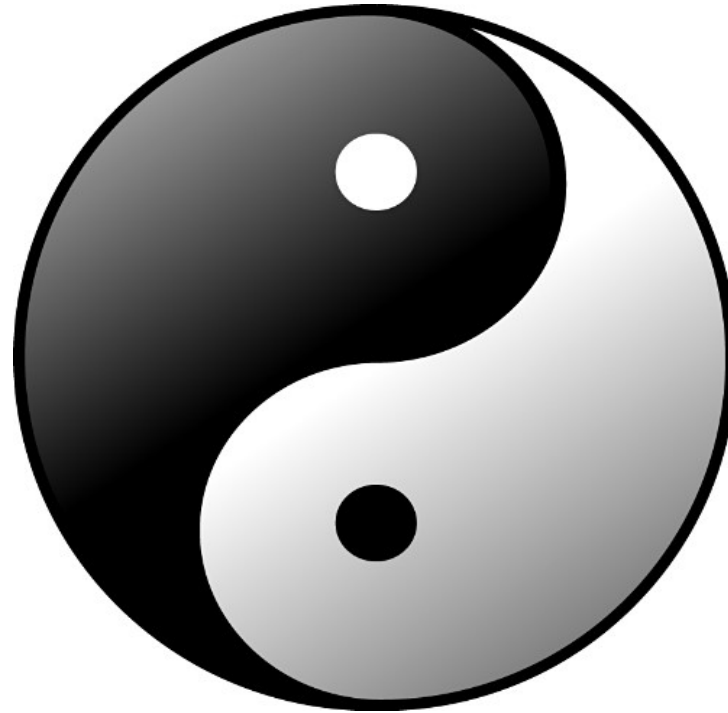
<http://www.agilescaling.org/ask-matrix.htm>

Some thoughts on change...

- When we consider modifying the way we work together, we are talking about organizational development.
- The challenge with designing and realizing sustainable organizational development is finding the balance between *fitting* the organizational needs to the organizational capabilities and defining a path that the organization can traverse.

we need to match the process to the people (not impose the process on the people)

Culture



Practices

N.B. Over time culture will trump unsupported practices.

Two Questions

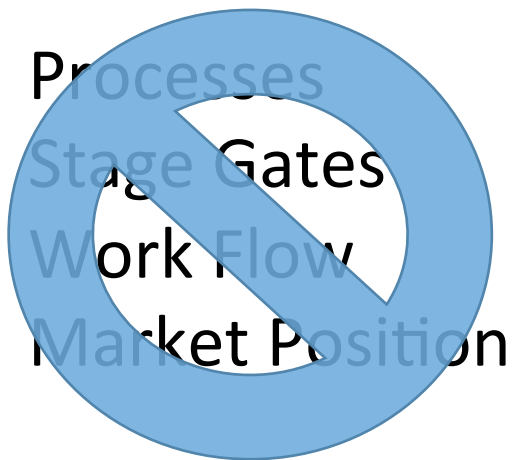
Where are we?

Where do we want to go?



Where are we?

Before we can chart a course to defining and implementing a new way of working, we need to understand how we currently work.



Beliefs
Values
Attitudes
Behaviors

We need a different perspective....



F R E D E R I C L A L O U X

FOREWORD BY KEN WILBER



*"Impressive! Brilliant!
This book is a
world changer!"*

— JENNY WADE, Ph.D.
author of *Changes of Mind*

Reinventing organizations

A Guide to Creating Organizations
Inspired by the Next Stage of Human Consciousness



	Powerful leadership Instills fear in enemies and compliance in group Limited planning \ Limited reach	Command authority Division of labor	Str ma mil
	Clear hierarchy of power Defined succession plan Strong control over lower levelsof organization	Long term planning is possible Stable process for governing Formal hierarchy – defined roles	Go ag tra chu
	Competition of ideas Work is done to maximize gain Leadership identifies broad objectives, workers have some latitude in achieving them	Innovation Accountability Meritocracy	La pul
	Focus on delighting the customer Consensus decision Members are engaged in the work	Empowerment Values driven culture and inspirational purpose Multiple stakeholder perspective	Cul org (So and
	Anti-fragile Members drawn by a higher calling Decision making is spread across the company 'Advice Process'	Whole person comes to work Absence of management roles Purpose of organization is evolutionary and changes	Mo Bur

Color (Adjective)

Metaphor -

Evolutionary track

Characteristics

Thought Breakthroughs

Examples

Red (Impulsive)

Metaphor - Wolf Pack

Evolves from the need for safety in a chaotic environment

Characteristics

- Powerful leadership

- Instills fear in enemies and compliance in group

- Limited planning \ limited reach

Thought Breakthroughs

- Command authority

- Division of labor

Examples

- Street gangs, mafia, tribal militias

Amber (Conformist)

Metaphor – Army

Evolves when the short term planning of Red cannot provide long term succession

Characteristics

- Clear hierarchy of power

- Defined succession plan

- Strong control over lower levels of organization

Thought Breakthroughs

- Long term planning is possible

- Stable process for governing

- Formal hierarchy – defined roles

Examples

- Government agencies, traditional churches, military

Orange (Achievement)

Metaphor – Machine

Evolves when Amber organizations cannot adapt to changing environments

Characteristics

- Competition of ideas

- Work is done to maximize gain

- Leadership identifies broad objectives, workers have some latitude in achieving them

Thought Breakthroughs

- Innovation

- Accountability

- Meritocracy

Examples

- Large corporations, public universities

Green (Pluralistic)

Metaphor – Family

Evolves as people in Orange organizations don't feel connected to their work.

Characteristics

- Focus on delighting the customer

- Decision making is shared by the group (consensus)

- Members are engaged in the work

Thought Breakthroughs

- Empowerment \ Consensus

- Values driven culture and inspirational purpose

- Multiple stakeholder perspective

Examples

- Culture driven organizations (Spotify, Southwest, Ben and Jerry's)

Teal(Evolutionary)

Metaphor – Living system

Evolves as consensus seeking in Green slows down the delivery of work.

Characteristics

- Anti-fragile

- Members drawn by a higher calling

- Decision making is spread across the company and uses the 'Advice Process'

Thought Breakthroughs

- Whole person comes to work (creative, analytical, spiritual)

- Absence of management roles

- Purpose of organization is evolutionary and changes

Examples

- Morningstar, Buurzorg

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Leadership has ultimate power
Limited power sharing with others

Front line workers have no power
All decisions made by leader, only reaction and basic functioning left to individual



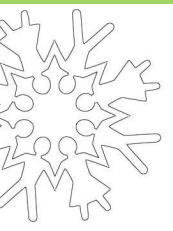
Power and privilege defined by rank and position.
Authority and decisions are not questioned by lower ranks

Front line workers expect leadership to make decisions and direction
Effectiveness is measured in how well you follow direction and keep order



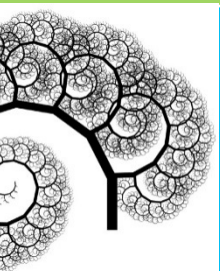
Leadership is in competition and cooperation with each other.
Some power is ceded to workers with a strong organizational structure remaining

Workers can strive for personal gain as well as organizational gain.
Competition and accountability seen at the team level



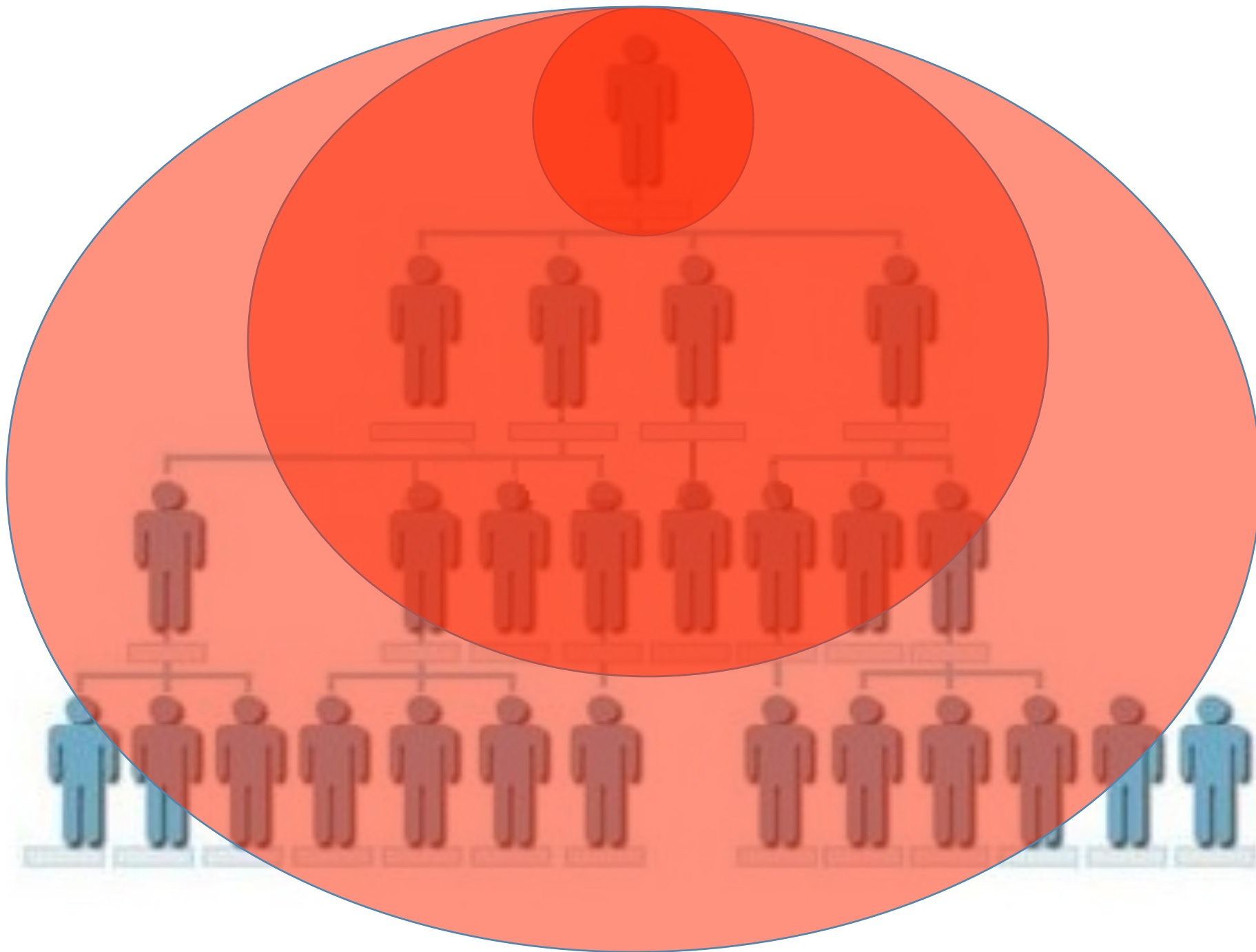
Servant leadership, goal of leader is to help others grow.
Limited amount of management, focuses on culture

Power spread throughout the organization with much of it at the team level due to the number of people



Leadership is focused on coaching and advising.
No formal power due to rank and position.

Self-management allows power to be distributed throughout the organization.
Workers are responsible for resolving problems, determining priorities, etc.



Two Questions

Where are we?

Where do we want to go?



Where do we want to go? And Why?

Answering these questions is critical for helping ensure success with organizational development.

Provides a 'North Star' for people to steer by day-to-day.

Allows us to create a road map for the change.

Where do we want to go?

What issues/problems are we trying to solve by using Agile | Lean practices at scale?

Why do we think these approaches will work for us?

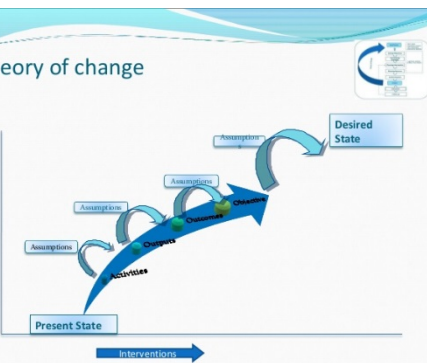
How does this change reflect on where the organization is and needs to be (with respect to Laloux's model)

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Red - Amber

Powerful leadership
Instills fear in enemies and compliance in
group
Limited planning \ Limited reach

Command authority
Division of labor



- Understand who in authority needs to validate the plan – work with team member begin creating\supporting the plan.
- Stress agile Roles and Responsibilities and begin creating a defined hierarchy. (Self direction would be counter productive here.)
- Use planning to help identify division of labor and support the process for moving through the system.

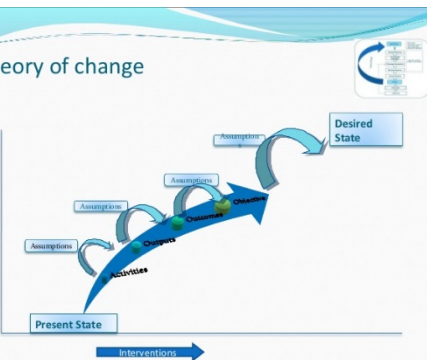
Clear hierarchy of power
Defined succession plan
Strong control over lower levels of
organization

Long term planning is possible
Stable process for governing
Formal hierarchy – defined roles

Amber - Orange

Clear hierarchy of power
Defined succession plan
Strong control over lower levels of organization

Long term planning is possible
Stable process for governing
Formal hierarchy – defined roles



- Work with leadership to allow competition to the plan.
- Begin creating plans with broader objectives.
- Less emphasis on defined roles and more emphasis on maximizing gains (teams).
- Work on understanding when the plans change and why.
- Identify and work with instances of meritocracy.

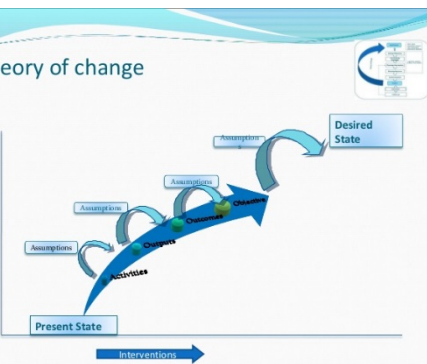
Competition of ideas
Work is done to maximize gain
Leadership identifies broad objectives,
Workers have some latitude in achieving them

Innovation
Accountability
Meritocracy

Orange - Green

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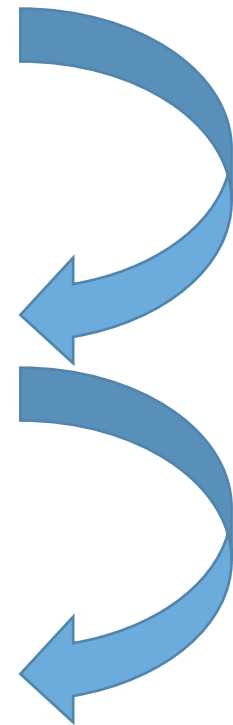
- More focus on customer and other stakeholders.
- Work on consensus decision making.
- Individual engagement and team belonging.
- Focus on values and purpose.

Focus on delighting the customer
Consensus decision
Members are engaged in the work

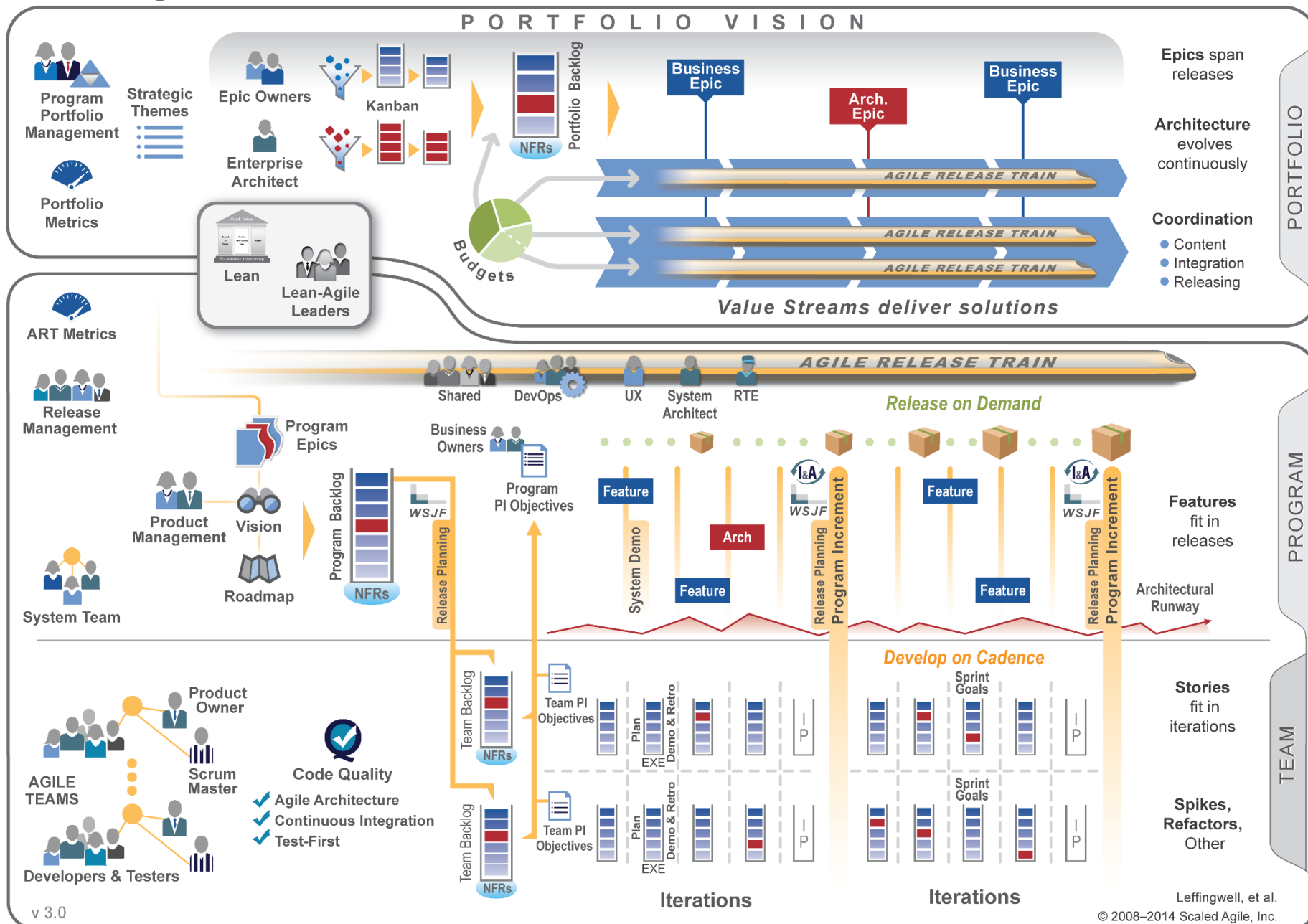
Empowerment
Values driven culture and
inspirational purpose
Multiple stakeholder
perspective

Amber - Green

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Competition of ideas Work is done to maximize gain Leadership identifies broad objectives, workers have some latitude in achieving them	Innovation Accountability Meritocracy
Focus on delighting the customer Consensus decision Members are engaged in the work	Empowerment Values driven culture and inspirational purpose Multiple stakeholder perspective



Scaled Agile Framework®

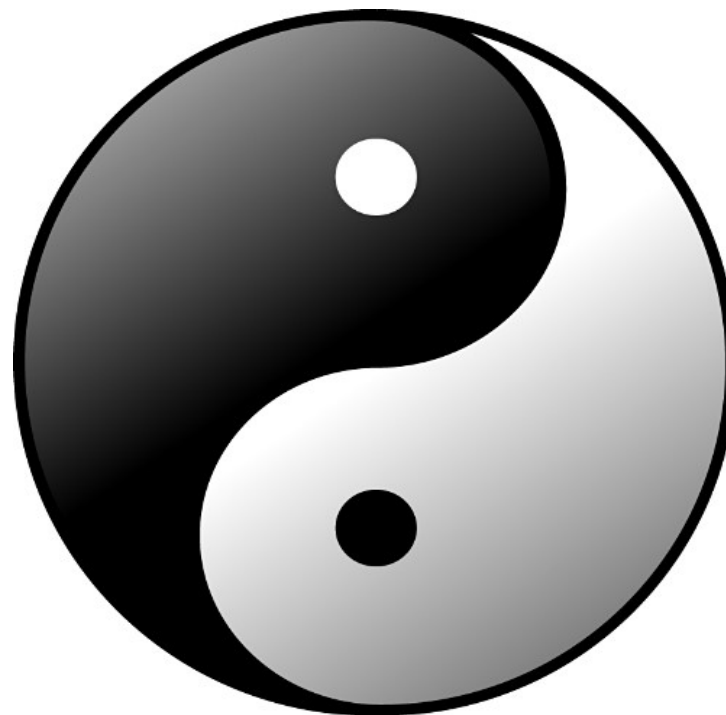


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Leffingwell, et al.
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Ownership Enemies and compliance in Limited reach	Command authority Division of labor	Street gangs, mafia, tribal militias
Concentration of power Mission plan Over lower level of	Long term planning is possible Stable process for governing Formal hierarchy – defined roles	Government agencies, traditional churches, military
Many ideas to maximize gain Identifies broad objectives, some latitude in achieving them	Innovation Accountability Meritocracy	Large corporations, public universities
Highlighting the customer vision Engaged in the work	Empowerment Values driven culture and inspirational purpose Multiple stakeholder perspective	Culture driven organizations (Southwest, Ben and Jerry's)
Driven by a higher calling Engagement is spread across the company	Whole person comes to work Absence of management roles Purpose of organization is evolutionary and changes	Morningstar, Buurzorg

Culture



Practices

