Agile Transformation Approach

We provide coaching and mentoring services to organizations that want to transition to Agile and Lean mindset.


We focus on an holistic change and hence our approaches are sustainable and impact-full. Unlike the depiction below:

**Typical Agile Transformations**

<table>
<thead>
<tr>
<th>Expectations</th>
<th>Reality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Today I will delight users by shipping high-quality, valuable user-story</td>
<td>with all this Scrumming, I don’t even have time to finish my regular tasks</td>
</tr>
</tbody>
</table>

**We expect, Resilience, Harmony & Agility**
**But end-up with, Brittleness, Chaos & Fragility**

Having been part of many other similar transformations:

**Good news:** Nothing strange or unexpected…
**But we need to,** fix things quickly!

Our team of Agile/Lean/XP coaches can work with your teams on a part-time or a full-time basis. The objective of our coaches is to build a self-sustainable team and make them more ‘agile’. Our
approach to coaching helps the organization to build a community of Agilists, who understand the values/principles behind Agile/Lean/XP methods. Our hands-on experience coaching teams has taught us that the transition process helps to broaden the perspectives of the team members about software and other things in general.

Our primary focus is on ‘People, Process & Plan’, so that organizations can build innovative and successful ‘Products’.
We use this **Agile Fluency Model** to guide us on the team's progress and organisation's investment in helping teams mature as they adopt an agile working culture.
Attaining Fluency

To achieve Business Impact & Customer Engagement

<table>
<thead>
<tr>
<th>Investment</th>
<th>Outcome</th>
<th>Customer Engagement</th>
<th>Business Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team development and work process design</td>
<td>Greater visibility into teams' work; ability to redirect</td>
<td>Customers are aware of the progress and involved in reviewing/validating business value</td>
<td>Focus on Value delivery early and often</td>
</tr>
<tr>
<td>Lowered productivity during technical skill development</td>
<td>Low defects and high productivity</td>
<td>Team understands realistic market cadence and aligns releases accordingly</td>
<td>Delivers high-quality incremental releases that map to market cadence</td>
</tr>
<tr>
<td>Social capital expended on incorporating business expertise into team</td>
<td>Higher value deliveries and better product decisions</td>
<td>Customers are able to quickly validate product's market fitment</td>
<td>By focusing on concrete business metrics, we can monitor ROI for achieving business success</td>
</tr>
<tr>
<td>Significant effort in establishing organisational culture; inventing new practices</td>
<td>Alignment with organizational goals; synergistic effects</td>
<td>Tight collaboration and high synergy in laying out future product direction</td>
<td>By focusing on global optimization, we can strategise business growth</td>
</tr>
</tbody>
</table>

While we provide personalized solutions to our customers based on your business needs, we also ensure that the core values and principles of Agile/Lean are not compromised.

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Over the last decade we have helped several organizations transform to Agile and Lean methods. In doing so, we have standardized our overall Agile Transformation approach, and the following are the high-level steps:

1. **Readiness Assessment**: Typically 3-5 day long (Learn More…)
2. **Drafting the initial agile adoption roadmap** (Learn More…)
3. **Identify internal coaches** (Learn More…)
4. **Define a concrete roadmap for the project with success criteria** (Learn More…)
5. **Deliver the required training before the team can start sprinting** (Learn More…)
6. **Identify a couple of pilot projects** (Learn More…)
7. **Hands-on coaching/mentoring at regular intervals** (Learn More…)
8. **Establish a project dashboard to visualize health of the project** (Learn More…)
9. **Setup monthly check-points with all relevant stakeholders**

The aforementioned approach is only an indicative set of steps, and this would differ from context to context. We also provide consulting/training services based on the specific needs of the organization.

1. **Readiness Assessment**

Before we start with any change/transition, we would like to understand:

- Current state of affairs and how the team operates
- Key challenges faced by the team and its management
- Key stakeholders and their expectations
- Gaps in terms of knowledge and skill levels of the team
- Historic data to understand the performance of the team

To achieve this, we would like to do a 3-5 day readiness assessment, which would help us:

- Introduce ideas that may help the team
- Learn what needs most improvement
- Discover what the team is capable of improving
- Identify internal change agents who can champion the cause
- Formulate specific recommendations (e.g. training/coaching)

A typical 5-Day In-Person Assessment
Our consultant will spend time with your team to understand the current context of their product. We’ll conduct a mini-retrospective and build a value stream map with the team to highlight bottlenecks. The consultant would sit down and pair with your developers, testers, SME, Product Owners and Designer. Also we would like to watch some team meetings. At the end of these activities, we’ll be able to identify (at a high level) gaps in the over-all process and shortcomings in terms of skills. All these findings would be submitted as a report.

Sample break up of assessment:

### Agenda

<table>
<thead>
<tr>
<th>Time</th>
<th>Day</th>
<th>Meeting</th>
<th>Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>09:00 AM - 10:00 AM</td>
<td>1</td>
<td>Overview of teams, their structure &amp; responsibilities, Organizational Background</td>
<td>General Manager, Quality Head/VP of Engineering</td>
</tr>
<tr>
<td>10:00 AM - 11:00 AM</td>
<td>1</td>
<td>Insights from the Quality Team</td>
<td>Quality Head, Couple of Quality Leads</td>
</tr>
<tr>
<td>11:00 AM - 12:00 PM</td>
<td>1</td>
<td>Overview of the first Project by their Project Manager and Product Owner</td>
<td>Project Manager, Product Owner, Scrum Master</td>
</tr>
<tr>
<td>2:00 PM - 3:00 PM</td>
<td>1</td>
<td>Detailed review of Project 1</td>
<td>Team (Devs, QAs, BA)</td>
</tr>
<tr>
<td>08:00 PM - 9:00 PM</td>
<td>1</td>
<td>Discussion with CTO Office</td>
<td>CTO, Lead Architects</td>
</tr>
<tr>
<td>9:00 AM - 10:00 AM</td>
<td>2</td>
<td>Day 1 retro</td>
<td>General Manager, Quality Head/VP of Engineering</td>
</tr>
<tr>
<td>10:00 AM - 11:00 AM</td>
<td>2</td>
<td>Insights from key Project Manager and Product Owners regarding their current challenges around existing processes</td>
<td>Product Manager, Product Owners</td>
</tr>
<tr>
<td>11:30 AM - 12:30 PM</td>
<td>2</td>
<td>Overview of the second Project by their Project Manager, Scrum Master and Architect</td>
<td>Project Manager, Architect and Scrum Master</td>
</tr>
<tr>
<td>2:00 PM - 3:00 PM</td>
<td>2</td>
<td>Detailed code review of Project 2</td>
<td>Team (Devs, QAs, BA)</td>
</tr>
<tr>
<td>9:00 AM - 10:00 AM</td>
<td>3</td>
<td>Day 2 retro</td>
<td>General Manager, Quality Head/VP of Engineering</td>
</tr>
<tr>
<td>10:00 AM - 11:00 AM</td>
<td>3</td>
<td>Insights from the Scrum Masters, Discussion around challenges faced by the Scrum Masters</td>
<td>Scrum Masters across different projects</td>
</tr>
<tr>
<td>11:00 AM - 12:00 PM</td>
<td>3</td>
<td>Executive Management meeting</td>
<td>Executive Management</td>
</tr>
<tr>
<td>12:00 PM - 1:00 PM</td>
<td>3</td>
<td>Overview of Project 4 by PM &amp; SM, Followed by detailed project review</td>
<td>PM, SM</td>
</tr>
<tr>
<td>05:30 PM - 6:30 PM</td>
<td>3</td>
<td>Discussion with Automation Tester from Project 1</td>
<td>Automation Tester</td>
</tr>
<tr>
<td>09:00 AM - 10:00 AM</td>
<td>4</td>
<td>Day 3 retro</td>
<td>General Manager, Quality Head/VP of Engineering</td>
</tr>
<tr>
<td>10:00 AM - 11:00 AM</td>
<td>4</td>
<td>AgileWay of Dealing with Uncertainty in a Complex Adaptive World - Workshop</td>
<td>Key representatives from different Projects</td>
</tr>
<tr>
<td>2:00 PM - 3:00 PM</td>
<td>4</td>
<td>Review with Design Team on how agile’s evolutionary design fits into the company’s design process</td>
<td>Architects from Design Team</td>
</tr>
<tr>
<td>3:00 PM - 4:00 PM</td>
<td>4</td>
<td>Review with Analyst Team on how requirements are gathered and managed on Agile projects</td>
<td>Analysts from Requirements Team</td>
</tr>
<tr>
<td>4:00 PM - 5:00 PM</td>
<td>4</td>
<td>Review with Architect from CTO office to understand how they are executing projects</td>
<td>Architects from CTO Office</td>
</tr>
<tr>
<td>5:00 PM - 6:00 PM</td>
<td>4</td>
<td>Discussion with Project 1’s Architect</td>
<td>Architect</td>
</tr>
<tr>
<td>6:00 PM - 7:00 PM</td>
<td>4</td>
<td>Discussion with Project 3’s lead tester</td>
<td>Lead Tester</td>
</tr>
<tr>
<td>7:00 PM - 8:00 PM</td>
<td>4</td>
<td>Insights from Business Development/ SALES Team to understand what customer’s are asking for &amp; how Agile will help them</td>
<td>Sales and Pre-Sales Team</td>
</tr>
<tr>
<td>8:30 PM - 9:30 PM</td>
<td>4</td>
<td>Meeting with Practice Group owners to understand how Agile will impact (help) them</td>
<td>Practice Group Owners</td>
</tr>
<tr>
<td>09:00 AM - 10:00 AM</td>
<td>5</td>
<td>Day 4 retro &amp; plan for the day</td>
<td>General Manager, Quality Head/VP of Engineering</td>
</tr>
<tr>
<td>10:00 AM - 11:00 AM</td>
<td>5</td>
<td>Feedback to individual teams</td>
<td>PM and BA from the 4 teams</td>
</tr>
<tr>
<td>01:30 PM - 2:30 PM</td>
<td>5</td>
<td>Working on the roadmap</td>
<td>General Manager, Quality Head/VP of Engineering</td>
</tr>
</tbody>
</table>

### Sample Reports

- Agile Readiness Assessment Report from 2014
- Agile Readiness Assessment Report from 2012
- Agile Adoption Assessment Report from 2011
- Distributed Agile Adoption Case Study

### 2. Drafting out the Initial Agile Transformation Road Map
Based on the gaps identified and issues highlighted by the team & its management, we'll work with your team, to create a high-level, realistic Agile transformation road map to suit your specific needs. This road map will clearly highlight details of training and coaching needs your team might have and a rough plan of execution. The plan also takes into account how you would like to invest your budget in a pragmatic way.

3. Identify Internal Coaches

During this visit, based on the interactions with various team members, we’ll help you identify some potential internal coaches in your team. It’s critical to identify these individuals early on as they can become your change agents and coaches to scale/sustain Agile practices in your organization.

We use the following criteria to identify at least one internal coach per team who is

- Motivated and passionate!
- In leadership role with strong technical skills
- Has good understanding/handle on how the team works (its process)
- Individual who have earned respect from rest of the team (Go-to person)
- Who will be co-located with the team for the next 6-12 months
- Ideally such individuals will be under high demand, hence they will need some bandwidth to perform these tasks. To start with, they might need to spend a day a week for the next 3 months getting deeper insights into Agile methods via Self-learning, classroom training and on-job learning
- We also want to ensure we have a good diversity (role, background, gender, etc.)

4. Concrete Road map for the Project with Success Criteria
Inline with the overall organizational agile transformation road map, we need to create a more tactical road map for the specific project. This road map contains various milestones and checkpoints with success criteria. Defining and agreeing upon the success criteria upfront is extremely important for a shared understanding and to get every one’s buy-in.

5. Required Training before teams start Sprinting

Depending on the skill-gaps identified during the assessment, we would propose some minimum classroom training and some assignments with a mini-project. Training can vary quite drastically for each cross-functional skill. Our trainers are well equipped with first hand working experience on all these skills. A few sample trainings:

- 3 Day Agile Project Management Overview Workshop for Team Leads, Developers, Testers & PM
2 Day Product Discovery Workshop for Product Owners/Managers, PM, Team Leads and Analysts/SME
2 Day Project Automation Workshop for selected team members
2 Day User Story Workshop for Product Owners/Managers, Analysts/SME and Team Leads
3 Day TDD and Refactoring Workshop for all Developers
2 Day Reviving Legacy Code Workshop for all Developers
4 Day Design Patterns Workshop for all Developers and Architects
2 Day Agile Testing Workshop for all Testers & Tech Leads

6. Identify Pilot Projects

Trying to change the whole company is a long process. We first need to create some internal success stories on real (different) projects to

- Get other team’s buy-in
- Create internal/external sales & marketing collateral
- Mine out patterns that work in our company/culture
- Rapidly create expertise & local champions
- Create some case studies & a platform for team members to learn about the new way of working
Use these pilot projects to constantly push the envelope on the process & innovation side
Minimize the risk of things going out of control. Also formulate a transition strategy (we’ve seen many company fail miserably when they try to do a big-bang roll out)

7. Hands-on Coaching

Our coach will work with your team, hands-on to mentor/guide them through their agile implementation. Over the years, we’ve discovered that a part-time coaching model is the most effective coaching approach. However we also provide full-time coaching based on the requirements. In a part-time coaching approach, our coach will be onsite, working hands-on with the team for one full week and then offsite (accessible via email & phone, but off the project) the next week. Basically, the coach is available on-off either alternative weeks.

This approach has many advantages:

- When the coach is not available full time, teams realize they cannot fully depend on the coach. The coach is no longer the bottleneck in making decisions. Teams start to take ownership and make more decisions (usually by consulting the coach, but not waiting for the coach.)
- When a coach steps out for sometime and come back to the team, she brings a slightly fresh perspective and can pay attention to weak signals. Many times we get so
engrossed in what we are doing, that we might miss out paying attention to something else.

- Coaching can be intense. Having a little time off from coaching helps the teams get a breather. Which makes the overall coaching more sustainable.
- As coaches we expect things to change much faster rate than usually they do. If we are there full-time, it might start bothering us. But with the on-off model, the slower rate of change seems more acceptable. Similarly the team does not feel pressurized to accept change at a rate that might not be sustainable or acceptable to them.
- The management seems to get more confidence in the whole engagement, because they can see things are not blowing up when the coach is not around.
- Last but not the least, there is a good financial incentive for the company.

8. Visualising Health of the Project

There are various important attributes that we can monitor to see if we are headed in the right direction. Depending on the current pain-point of the team, our coaches will pick a sub-set of metrics to visualize them in the team area.

To visualise team's self-organising capabilities, we can do something similar

![Graphs showing project health](image)

To visualise team's progress
To visualise code quality

Testimonials

I used Naresh’s services for Agile transformation at Aditi. Naresh possess a great combination of process and technical strength which I couldn’t find in the various profiles/consultants that we had evaluated for this exercise. His ability to work with all disciplines (dev, test, analysts, project managers) to guide them and give valuable inputs is commendable. We have got great success with the workshops that he did at Aditi.

      -- Mini Manakame, General Manager, Aditi Technologies

Naresh is arguably the ONLY agile evangelist and coach who is also a coder and tester (at least I
think so - I haven't met any one else with similar credentials). A hands-on techie, Naresh can expose the fundamental problems in your organizations and is always willing to engage with your development teams at an execution level.

A world-class consultant (without the packaging of consulting types), Naresh is a no nonsense agile coach. Strongly recommended for Agile/XP, TDD, Refactoring, OOAP and Design Patterns training.

-- Manoj Kumar, Senior Director, Misys India