What does it mean to be agile? What are some benefits of being more agile? What are some agile techniques that can be incorporated in a waterfall environment? In this session, we will share with you how I.T. folks at the San Diego County Office of Education are developing an "agile mindset."
- I know what Agile is and what it is NOT
- I can identify the Top 5 Agile Practices for a Waterfall Environment
- I can follow the 5 Steps to Transition from Waterfall to Agile
Why Use Agile Methods?

- Improve Customer Involvement
- Increase Quality
- Simplify Releases
- Increase Operational Awareness
- Reduce Risk
- Respond To Change

Q:
Why are you considering using Agile methods? What problem are you trying to solve?
WHAT IS AGILE

What is Agile NOT?
Your plan

Reality

PROJECT PLANNING
THE AGILE MINDSET

- **Individuals and interactions** over processes and tools
- **Customer collaboration** over contract negotiation
- **Responding to change** over following a plan
- **Working products** over comprehensive documentation
Agile can Reduce:
• Risk
• Scope creep
• Time to market

Agile can Improve:
• Customer experience
• Flexibility
• Product quality
• Productivity
• Team morale
• Project visibility

WHY AGILE?
<table>
<thead>
<tr>
<th><strong>AGILE</strong></th>
<th><strong>VS</strong></th>
<th><strong>WATERFALL</strong></th>
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</thead>
<tbody>
<tr>
<td>Flexible or undefined</td>
<td>REQUIREMENTS</td>
<td>Clearly defined</td>
</tr>
<tr>
<td>Iterative</td>
<td>DEVELOPMENT</td>
<td>Rigid</td>
</tr>
<tr>
<td>Incremental</td>
<td>DELIVERY</td>
<td>All at the end</td>
</tr>
<tr>
<td>Frequent</td>
<td>FEEDBACK</td>
<td>Only after delivery</td>
</tr>
<tr>
<td>Flexible</td>
<td>TIMEFRAMES</td>
<td>Strict</td>
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</table>
A SILVER BULLET
Agile will not work in certain situations

UNPLANNED
Agile planning is iterative and just-in-time

NEW
Principles behind Agile have been in place for decades

RIGID
Agile has many practices under its umbrella, not all of them need to be followed

A QUICK FIX
Transformation involves a lot of work, and it can take a long time to reap the benefits

WHAT IS AGILE NOT?
TOP 5 AGILE PRACTICES

For a Waterfall Environment
TOP 5 AGILE PRACTICES

1. Maintain a Backlog / Prioritize Requirements
2. Small Iterations
3. Daily Standups
4. Visualize the Work through Kanban Boards
5. Retrospectives

From PMI Session presented by NK Shrivastava, PMP, RMP, ACP, CSP, SPC4, ICP-ACC
• Develop a backlog to stay focused on the highest priorities at any point of time
• The backlog can replace or supplement the list of requirements
Find ways to have more frequent check-ins with the customer:

- Check-in with key customers/stakeholders
- Review current status
- Reflect on the results
- Adjust the plan and backlog accordingly
Daily Standups

Use to:
• Identify impediments
• Make quick decisions
• Eliminate other meetings

Time box
Same place
Same time

Facilitated by Scrum Master
Full team presence
Focus on 3 questions

Do NOT Use as:
• Status meeting
• Problem-solving session
• Open-ended discussion

3 Main Questions:
1. What did I do yesterday?
2. What will I do today?
3. What's in my way?
One rule:
Limit work in progress (WIP)

Visualize the Work through Kanban Boards

- Physical or digital
- Items move from left to right
- Tailor by adding columns and lanes
Three basic questions are asked to everyone in a Retrospective:

- What went well?
- What could be improved?
- What action should be taken?

Hold lessons learned several times during the project:

- Lessons learned at the end are not actionable until next project
- Team may not see any value for lessons learned at the end
- Lessons learned during the project can be immediately applied to the current project
Q: Form a triad and discuss the 3 prompts:
• What went well?
• What could be improved?
• What actions should we take?
5 STEPS TO TRANSITION

From Waterfall to Agile
### 5 STEPS TO TRANSITION TO AGILE

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
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<tbody>
<tr>
<td>01</td>
<td>Identify change leaders</td>
</tr>
<tr>
<td>02</td>
<td>Perform discovery &amp; identify goals</td>
</tr>
<tr>
<td>03</td>
<td>Invest in Agile education</td>
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<td>04</td>
<td>Setup for success</td>
</tr>
<tr>
<td>05</td>
<td>Make the transition</td>
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</table>

**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.

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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.

*From PMI Session presented by NK Shrivastava, PMP, RMP, ACP, CSP, SPC4, ICP-ACC*
01
IDENTIFY CHANGE LEADERS

Change Leader

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

Agile Coach

- Experience with OCM
- Understanding of Agile
- Extensive coaching skills
Discovery by Agile Leader with Agile Coach Support

- What is your **Vision** for **Agile** for your organization?
- What **Strategy** do you want to use to achieve that vision?
- What is the **Roadmap** to achieve the vision?
• **Educate** leaders, managers, and team members on the **Agile mindset, methods, practices and tools**

• **Collaborate** to refine operating model developed in step 2
Implement **Agile** with **Methods** and **Tools Tailored** to best fit each team

- Scrum may work best for one team, where Kanban may work for another
- Identify **Agile Champions** for each team to sustain new **Ways of Working (WOWs)**
- Start collecting, analyzing and reporting **Metrics** to see if its working
Provide **Coaching**

- Let the team realize their potential
- Help them understand the **Why** behind **Everything**

Support **Champions** to **Be Agile** vs just **Doing Agile**

- Support them to solve problems, resolve conflicts and coach the team
- Help them to establish best practices for continuous improvement

**MAKE THE TRANSITION**
SESSION RECAP

Maintain a Backlog
Prioritize Requirements

Small Iterations

Daily Standups

Visualize the Work through Kanban Boards

Retrospectives

01
IDENTIFY CHANGE LEADERS

02
PERFORM DISCOVERY & IDENTIFY GOALS

03
INVEST IN AGILE EDUCATION

04
SETUP FOR SUCCESS

05
MAKE THE TRANSITION
Q: What are your next steps for using Agile practices in your organization?

NEXT STEPS:

- Jim Project
- Migration of old user-stories
- Meeting schedule (maker-compatible)
- Backlog refinement
- Definition Ready & Definition of Done
- Decision on 1st sprint
Inspiring and leading innovation in education—one well-executed project at a time!