

# FIRST STEPS TOWARD AGILITY

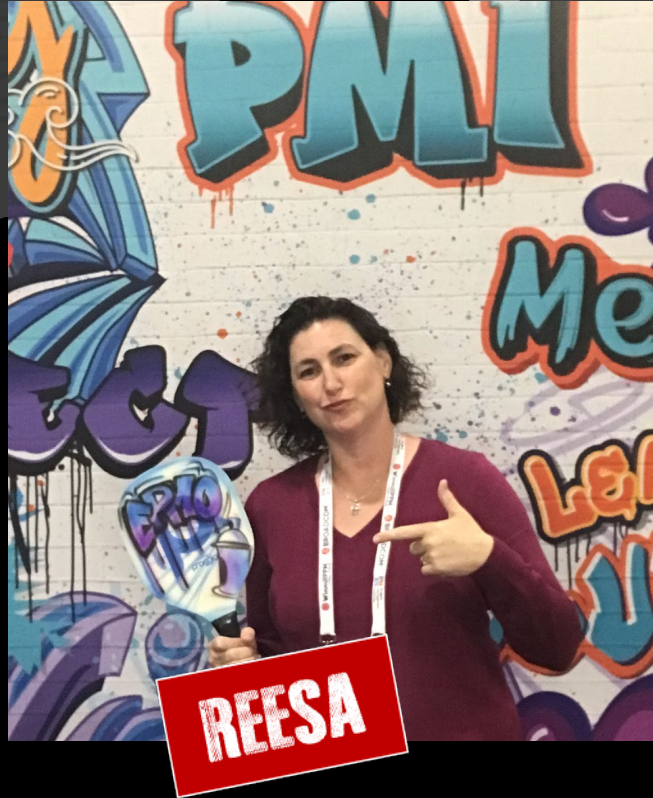
ANDREW BALDWIN | REESA FICKETT  
SDCOE Enterprise Project Management Office

NOVEMBER 2023  
CITE Conference

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."

# SDCOE EPMO

- 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



# DISCUSS

## 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

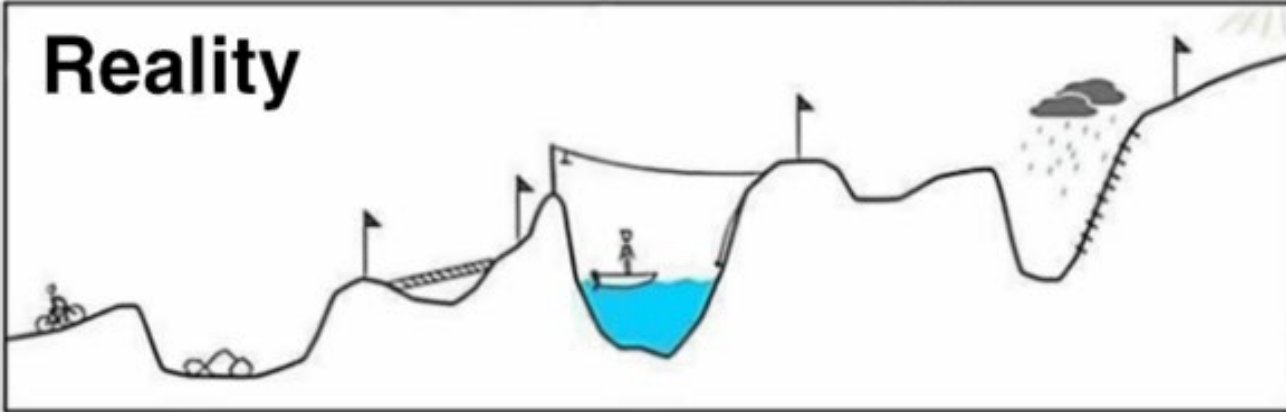
What is Agile NOT?



## 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



Waterfall design

Waterfall deliver



## Agile can Improve:

- Customer experience
- Flexibility
- Product quality
- Productivity
- Team morale
- Project visibility



Agile  
Iteration1

Agile  
Iteration 2

Agile  
Iteration n

Agile  
Iteration  
n+1

Agile  
deliver



## Agile can Reduce:

- Risk
- Scope creep
- Time to market

# WHY AGILE?

# AGILE VS

# WATER FALL

**Flexible or undefined**



**REQUIREMENTS**

**Clearly defined**

**Iterative**

**DEVELOPMENT**

**Rigid**

**Incremental**

**DELIVERY**

**All at the end**

**Frequent**

**FEEDBACK**

**Only after delivery**

**Flexible**

**TIMEFRAMES**

**Strict**

### **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**

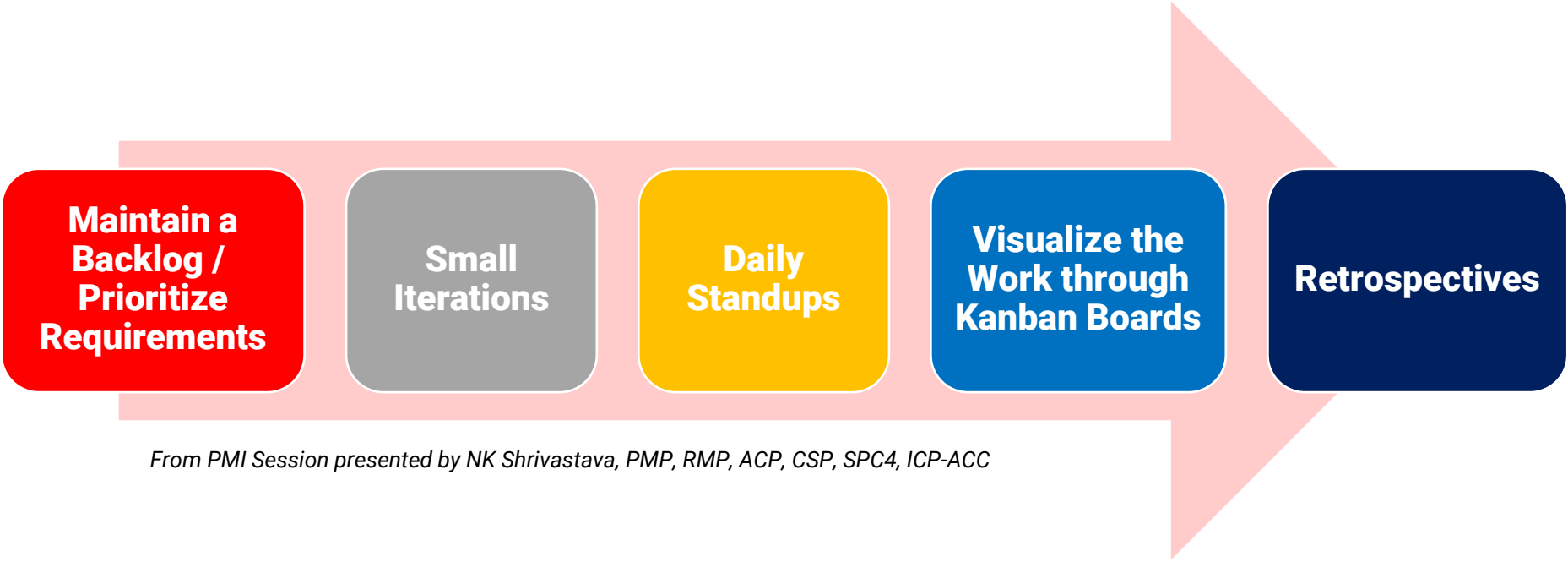
**Transformation involves a lot of work, and it can take a long time to reap the benefits**

**WHAT IS AGILE NOT?**

# TOP 5 AGILE PRACTICES

For a Waterfall Environment





**Maintain a  
Backlog /  
Prioritize  
Requirements**

**Small  
Iterations**

**Daily  
Standups**

**Visualize the  
Work through  
Kanban Boards**

**Retrospectives**

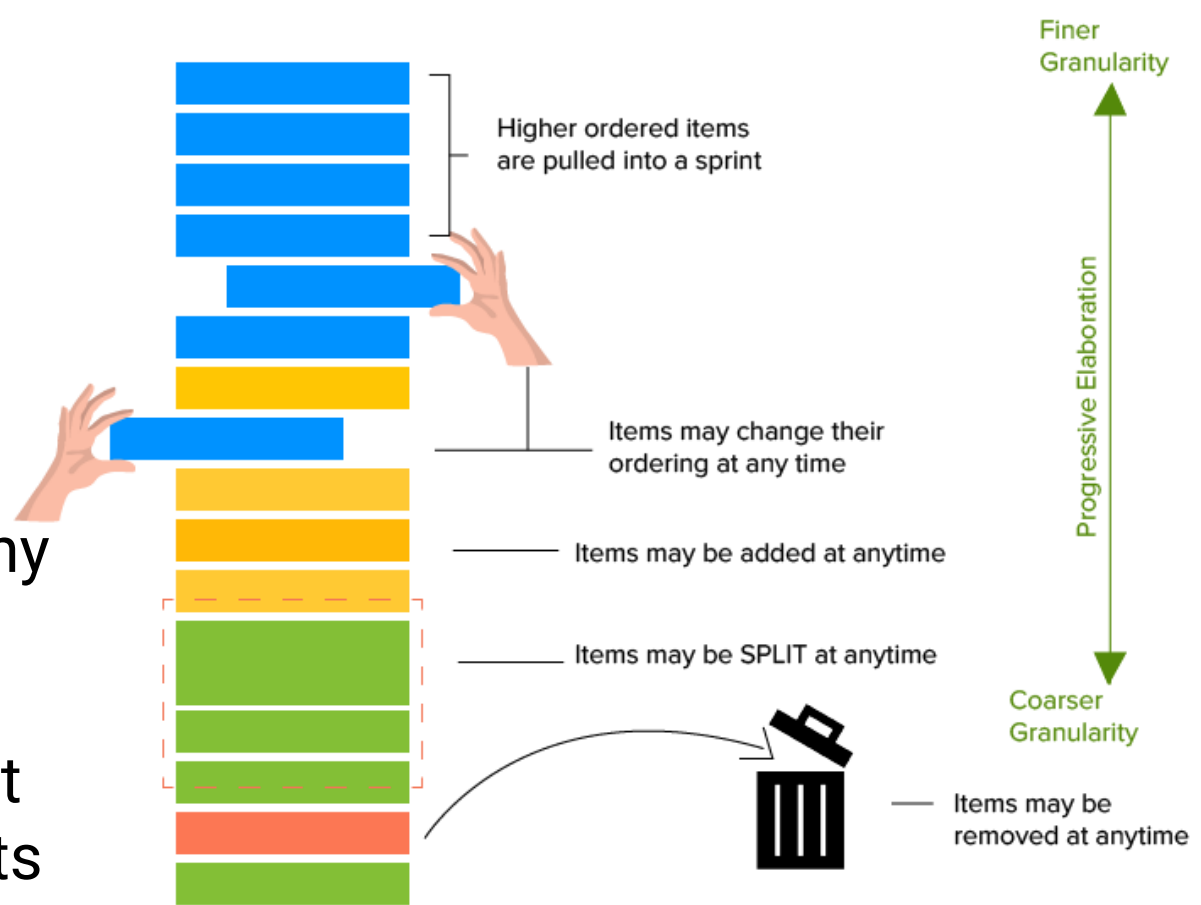
*From PMI Session presented by NK Shrivastava, PMP, RMP, ACP, CSP, SPC4, ICP-ACC*



## **TOP 5 AGILE PRACTICES**

## Maintain a Backlog / Prioritize Requirements

- 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

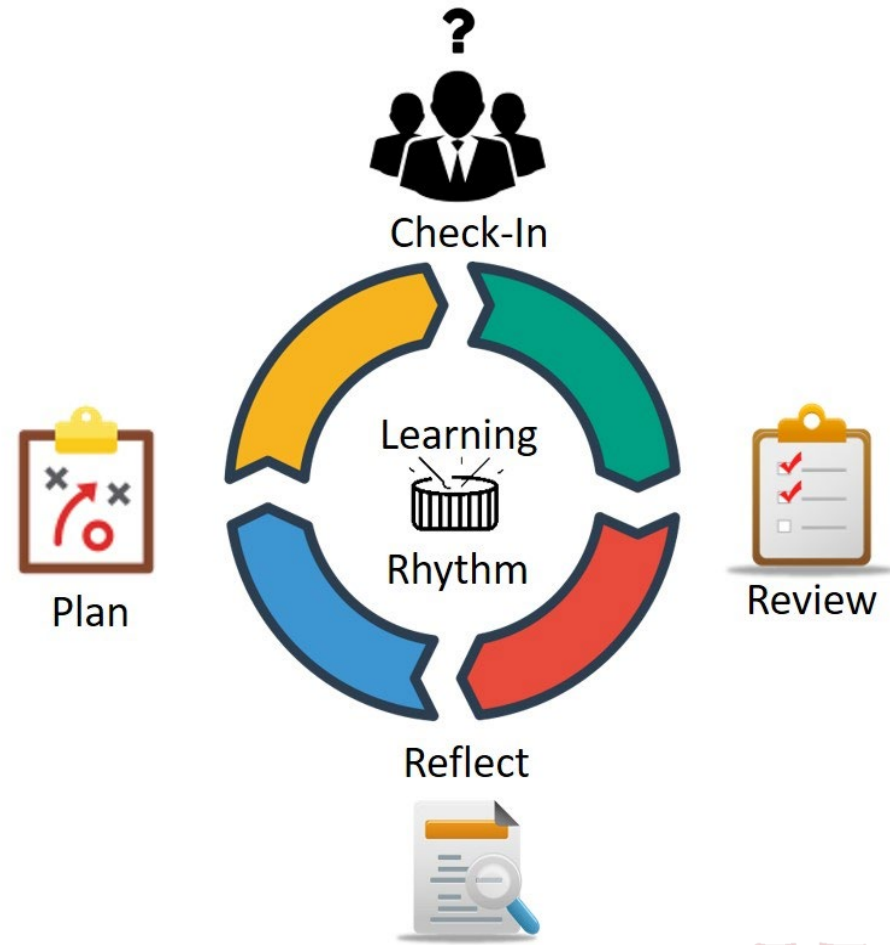


# MAINTAIN A BACKLOG

## Small Iterations

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



# SMALL ITERATIONS

## Daily Standups



Time box



Same place



Same time

### Use to:

- Identify impediments
- Make quick decisions
- Eliminate other meetings



Facilitated by  
Scrum Master



Full team  
presence

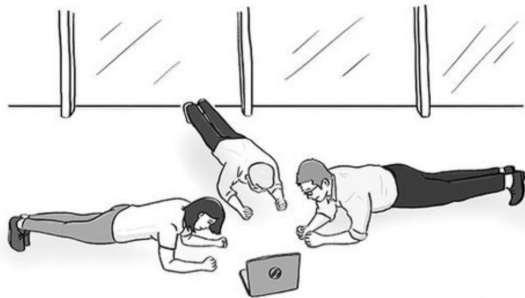


Focus on 3  
questions

### Do **NOT** Use as:

- Status meeting
- Problem-solving session
- Open-ended discussion

#### HOW TO RUN SHORT & EFFECTIVE MEETINGS



### 3 Main Questions:

1. What did I do yesterday?
2. What will I do today?
3. What's in my way?

# DAILY STANDUPS

## Visualize the Work through Kanban Boards

- Physical or digital
- Items move from left to right
- Tailor by adding columns and lanes



One rule:

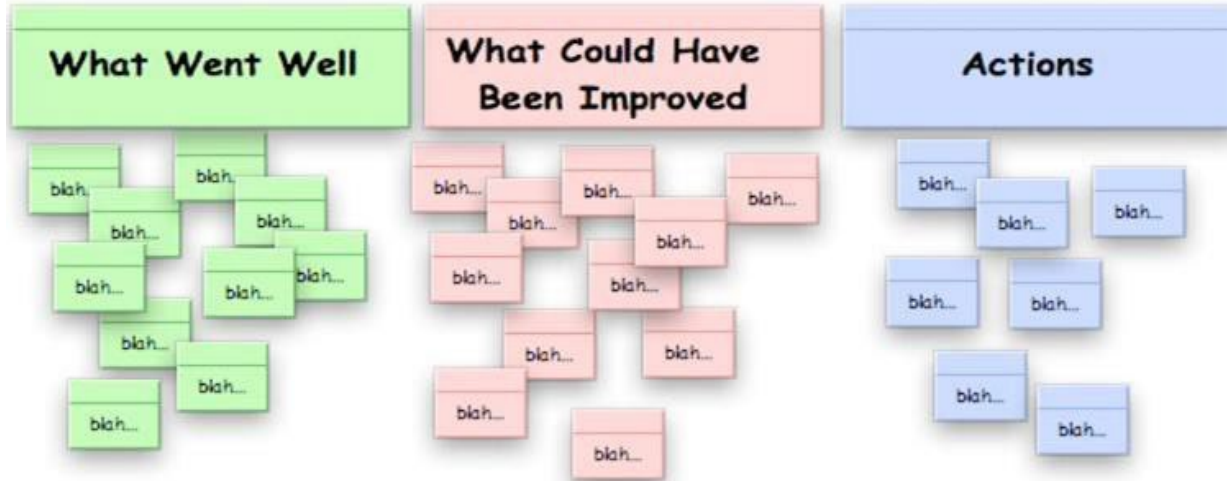
**Limit work in progress (WIP)**

## KANBAN BOARDS

## Retrospectives

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



**Three basic questions are asked to everyone in a Retrospective:**

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



# CONDUCT A RETROSPECTIVE

**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

# 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.

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*

# 5 STEPS TO TRANSITION TO AGILE

01

IDENTIFY  
CHANGE  
LEADERS

## Change Leader

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



LEAD AND  
INFLUENCE  
OTHERS



ANTICIPATE  
AND RESPOND  
TO CHANGE  
WITH AGILITY



BUILD AND  
SUSTAIN  
MOMENTUM  
AND FOCUS



COMMUNICATE  
EFFECTIVELY  
AND  
COLLABORATE



BUILD TRUST  
AND  
DEMONSTRATE  
EMPATHY



IDENTIFY AND  
OVERCOME  
BARRIERS TO  
CHANGE



SET THE VISION,  
AND BRING  
OTHERS  
ONBOARD



HOLD THE TEAM  
AND/OR YOUR  
COLLEAGUES  
TOGETHER



TAKE RISKS, BE  
CREATIVE,  
INNOVATIVE  
AND DECISIVE

## Agile Coach

- Experience with OCM
- Understanding of Agile
- Extensive coaching skills

**IDENTIFY CHANGE LEADERS**

02

PERFORM  
DISCOVERY &  
IDENTIFY GOALS

## Discovery by Agile Leader with Agile Coach Support



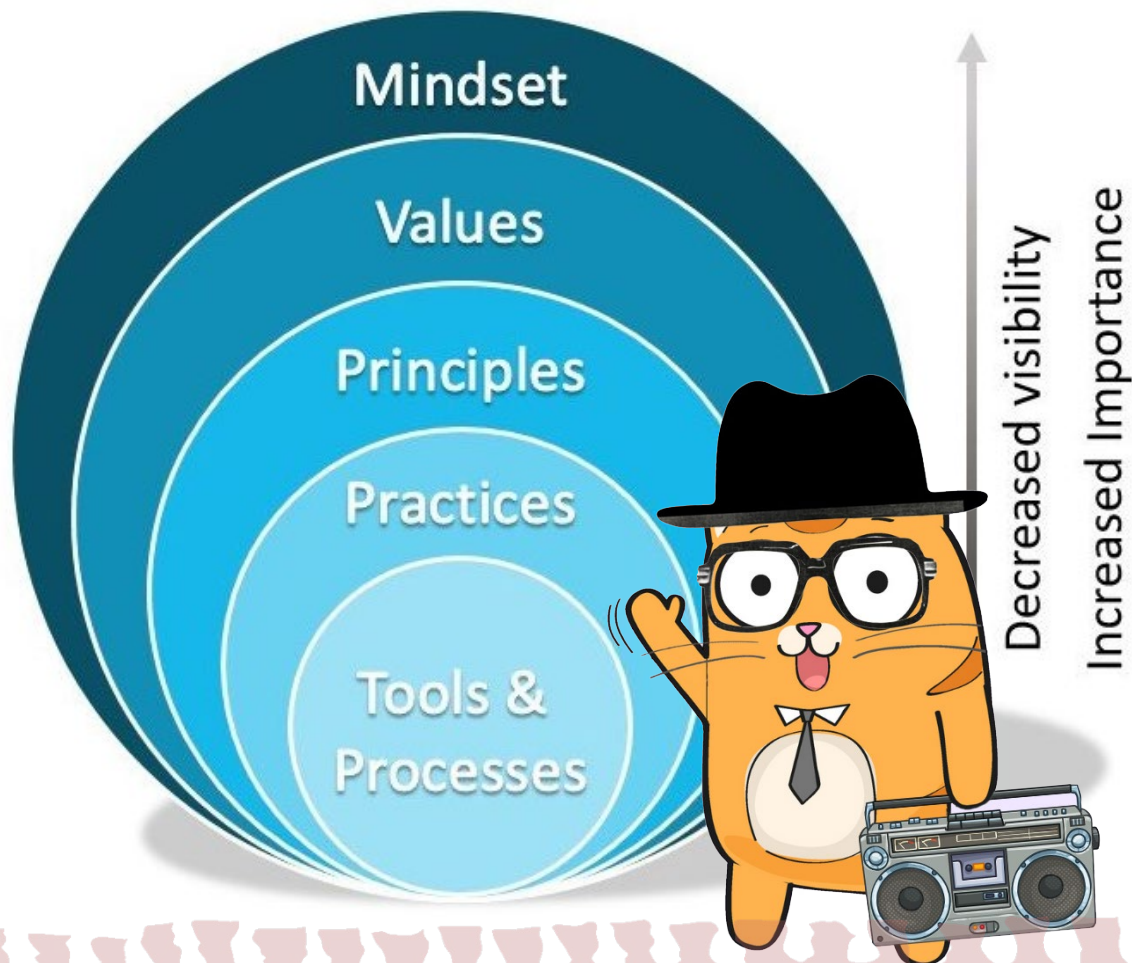
- What is your **Vision** for **Agile** for your organization?
- What **Strategy** do you want to use to achieve that vision?
- What is the **Roadmap** to achieve the vision?

**IDENTIFY GOALS**

# 03

## INVEST IN AGILE EDUCATION

- **Educate** leaders, managers, and team members on the **Agile mindset, methods, practices** and **tools**
- **Collaborate** to refine operating model developed in step 2



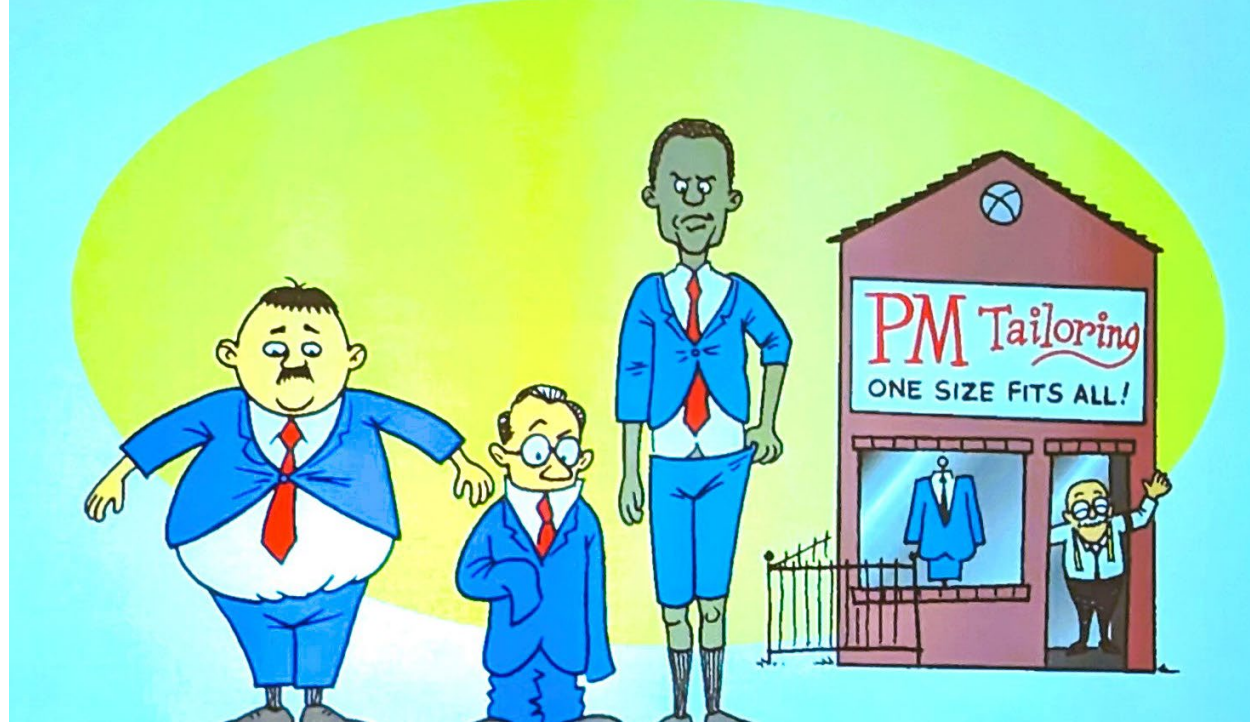
INVEST IN **AGILE** EDUCATION



# 04

SETUP FOR  
SUCCESS

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

**SETUP FOR SUCCESS**

# 05

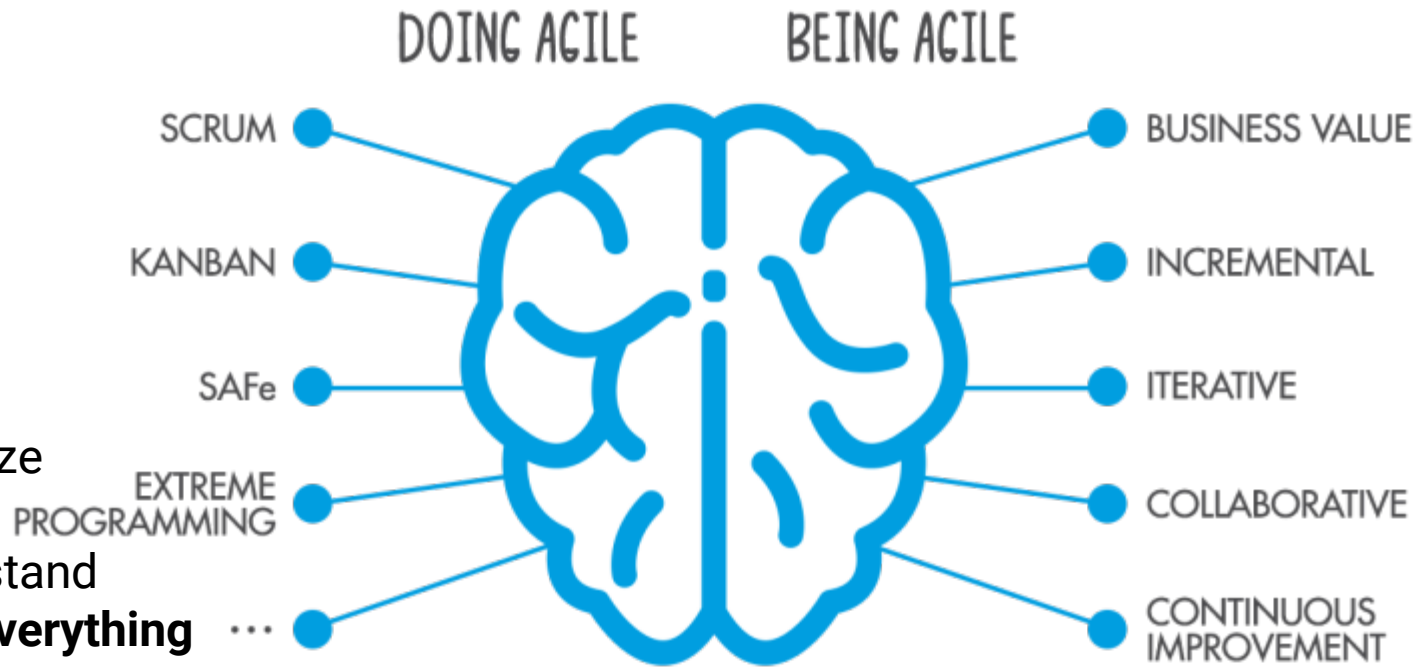
MAKE THE  
TRANSITION

## 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

# DISCUSS

## NEXT STEPS:

- Jim Project
- Migration of old user-stories
- Meeting schedule (maker-compatible)
- Backlog refinement
- Definition Ready & Definition of Done
- Decision on 1st sprint

Name

**Q:** What are your next steps for using Agile practices in your organization?

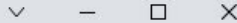


<https://sdcoe.net/EPMO>



[epmo@sdcoe.net](mailto:epmo@sdcoe.net)

Project Management - San Diego x +



SCHOOLS

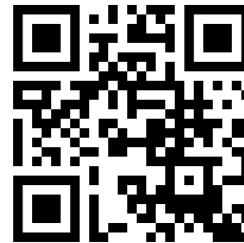
EDUCATORS

SPECIAL POPULATIONS

SUPPORTING STUDENTS

ADMINISTRATIVE SERVICES

**Inspiring and leading innovation  
in education—one well-executed  
project at a time!**



**SDCOE  
EPMO**