



PROJECT MANAGEMENT CENTER FOR EXCELLENCE

A.J. CLARK SCHOOL OF ENGINEERING
Civil & Environmental Engineering Department



The TAO of How

Jeff Dalton

2018 Project Management Symposium



Jeff Dalton
Chief Evangelist,
AgileCxO.org

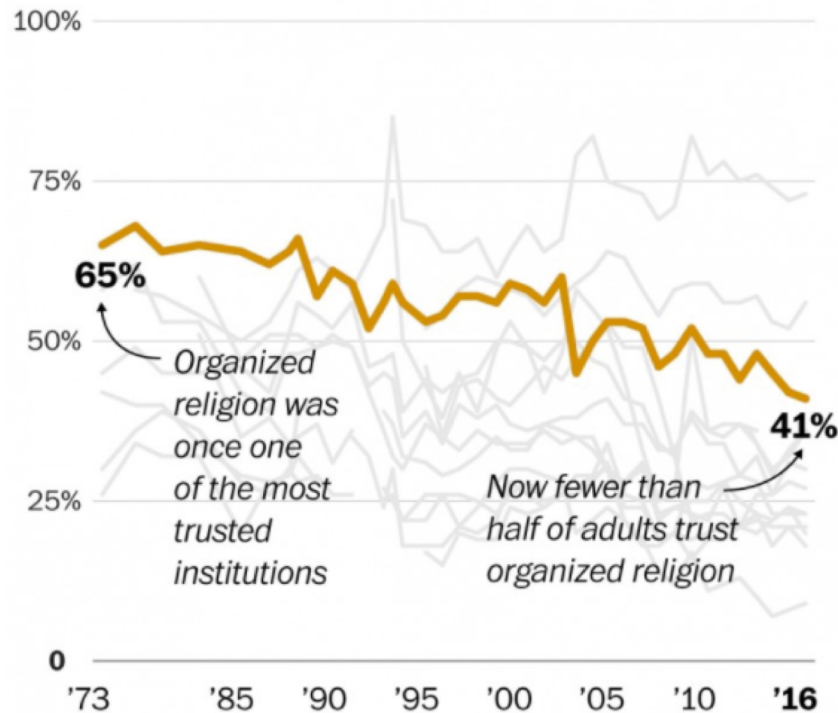




Gallup polls of U.S. adults over that period asked “how much confidence you, yourself, have in each” of the following. The results below were the combined percentage of those answering a “great deal” or “quite a lot”.

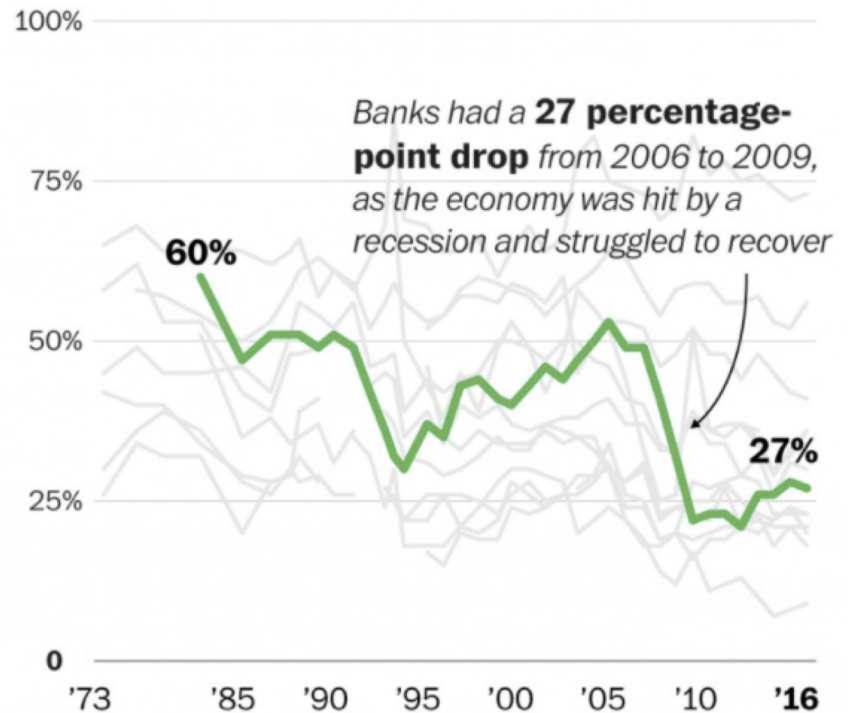
COMMUNITY

The church or organized religion

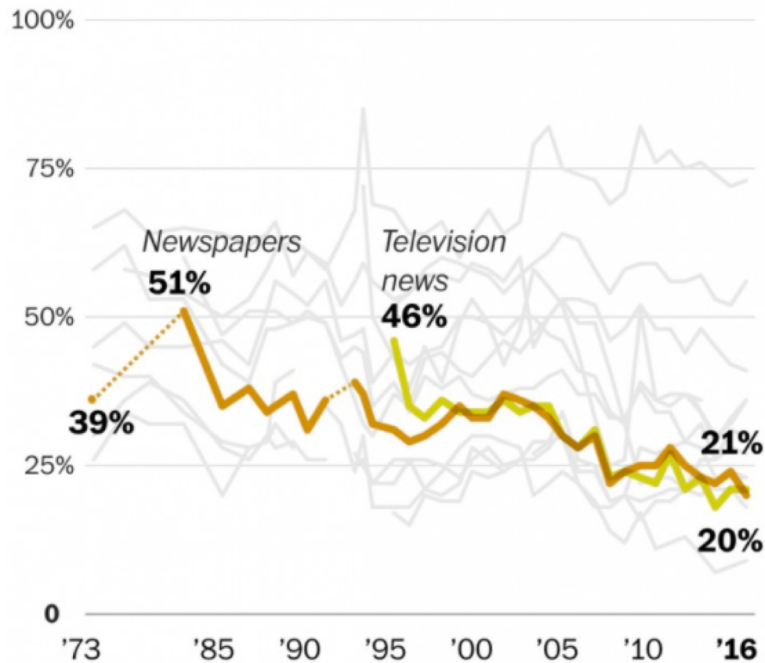


ECONOMY

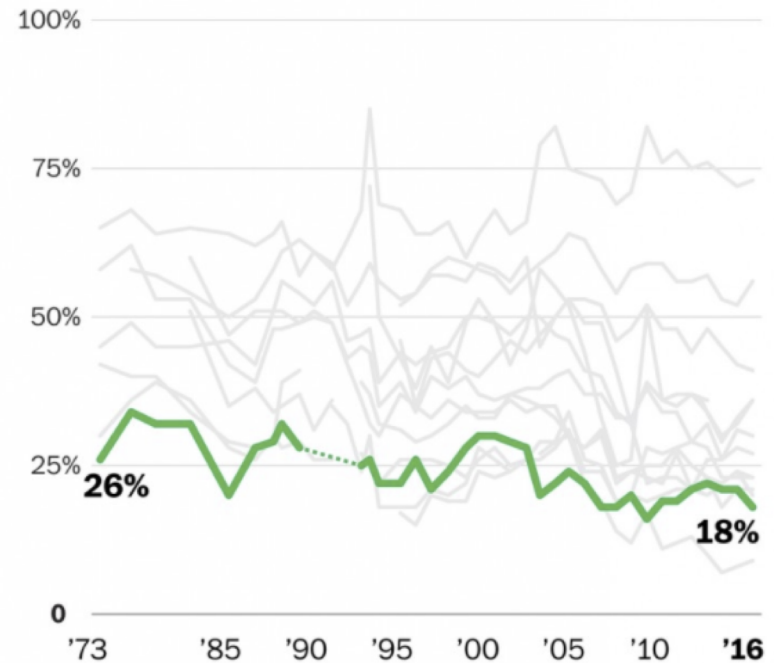
Banks



Media



Big business

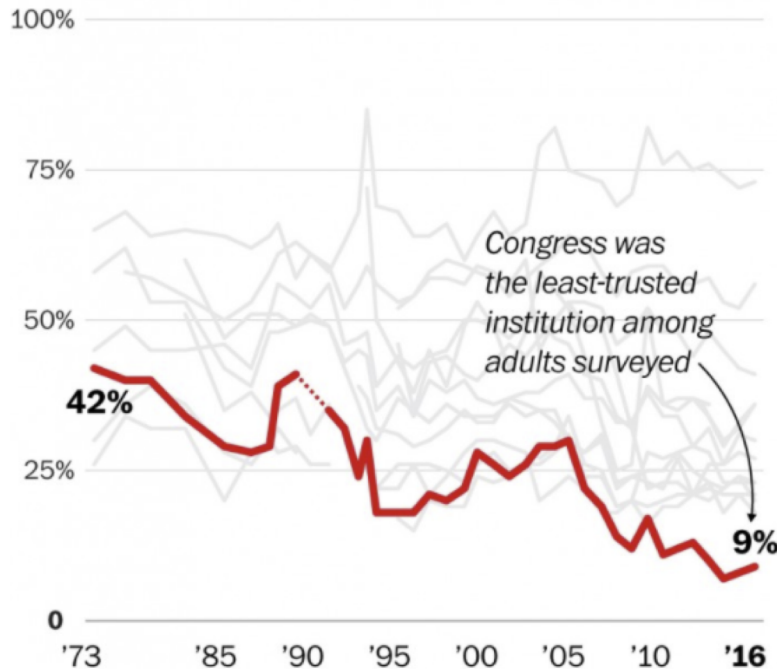


Survey methods varied over time, with the latest poll conducted June 1-5, 2016, among 1,027 adults reached through a random national sample of cellular and landline phones. The margin of sampling error is plus or minus four percentage points. Surveys from 1989 through 2015 were conducted by telephone, while surveys from 1973 through 1988 were conducted face to face.

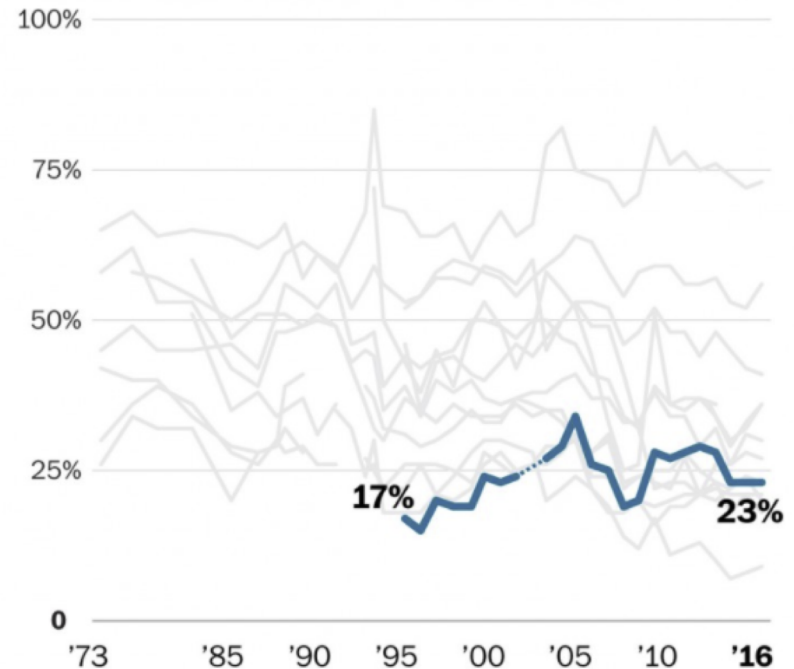
Source: Gallup Organization

AARON STECKELBERG / THE WASHINGTON POST

Congress



The criminal justice system



Survey methods varied over time, with the latest poll conducted June 1-5, 2016, among 1,027 adults reached through a random national sample of cellular and landline phones. The margin of sampling error is plus or minus four percentage points. Surveys from 1989 through 2015 were conducted by telephone, while surveys from 1973 through 1988 were conducted face to face.

The “Ability Models”

Management Policies (including Agile Values) tell us “why.”

For example:

“To work here you must follow the process”

“To ensure on-time delivery, all team members will conform to plans”

“In order to have high-quality, 100% of code is unit tested”

“Teams will adopt methods that support transparency, collaboration, and fail fast” so we can be more agile.”

These are “**Why-Ability**” Models. They masquerade as a total solution, but they’re not enough.

The “Ability Models”

Methods, Processes, and Frameworks tell us “What.”

For example:

- Capability Maturity Model Integration (CMMI) and its 356 practices
- PMBOK
- ISO 9001
- ITIL
- Test Maturity Model Integration (TMMI)
- Scrum, Extreme Programming

These are “**What-Ability**” Models. They also masquerade as a solution, and they’re not enough.

How-ability: The Agile Performance Hierarchy



Behavior changes as teams grow

守 破 離

shu

obey
fundamentals
repetition

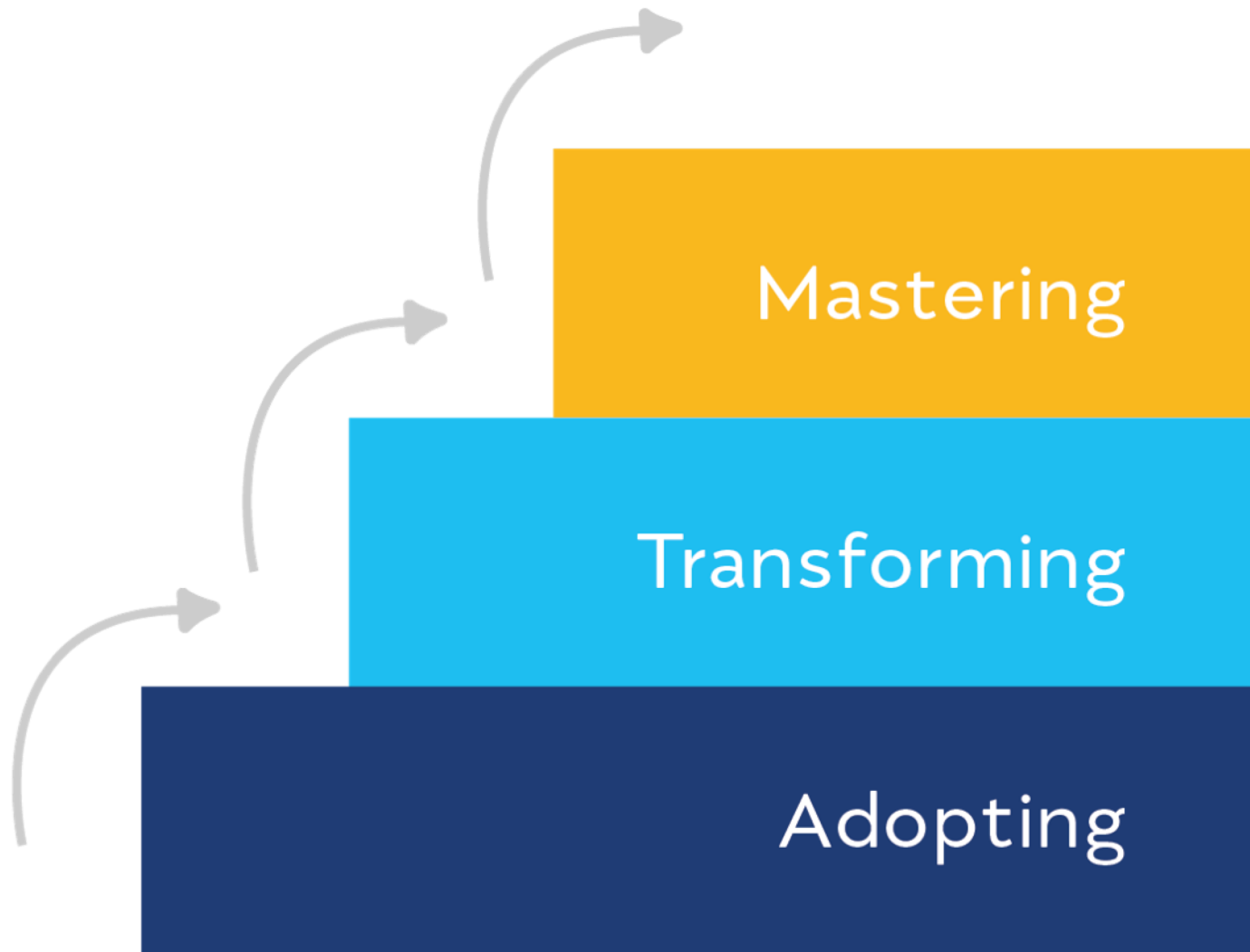
ha

detatch
self recognition
innovation

ri

separate
creative technique
transendence

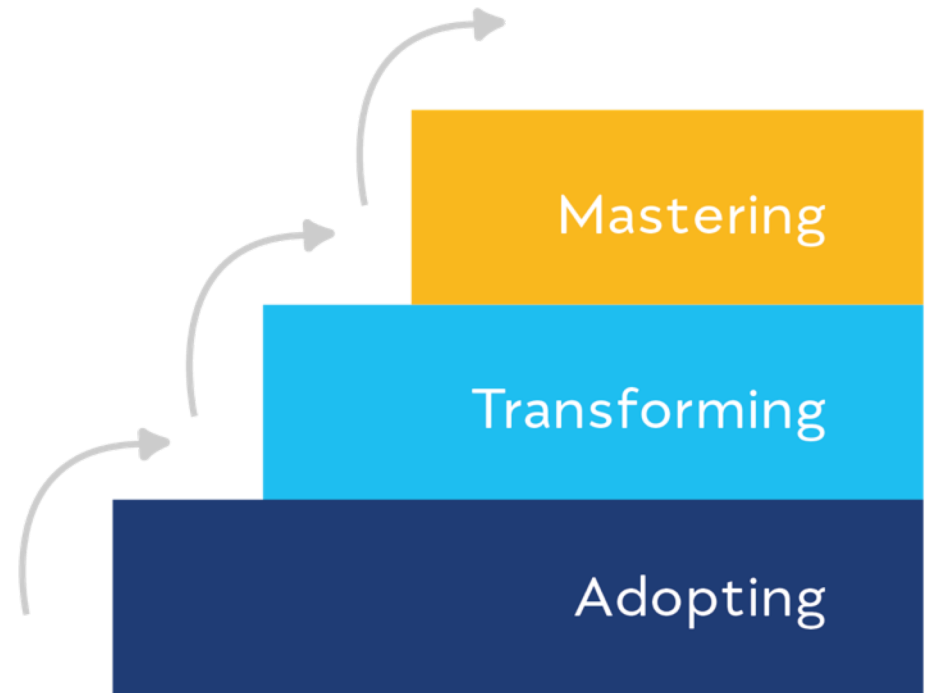
Behavior is “How-ability”



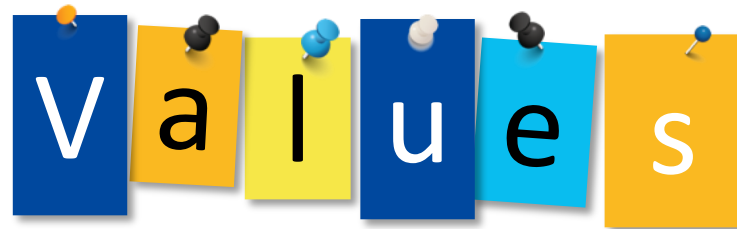
How-ability: The Agile Performance Holarchy



Leading

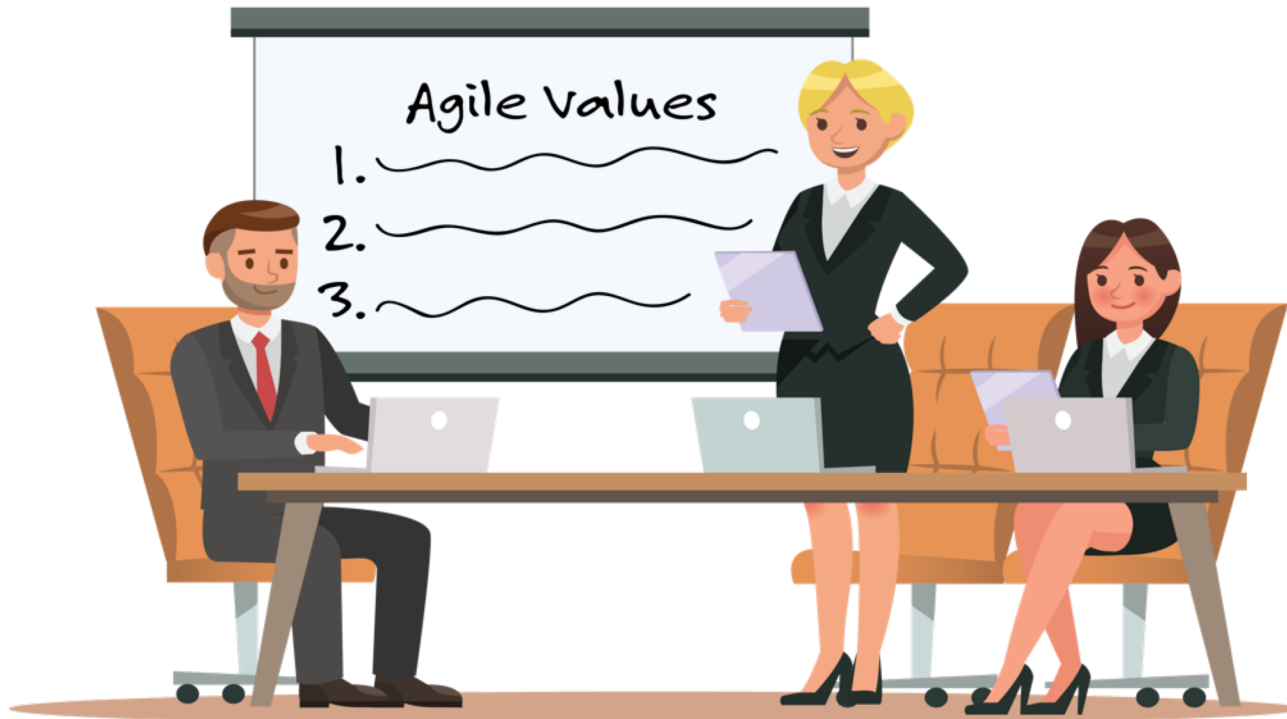


Leading



- > Openness
- > Focus
- > Commitment
- > Respect
- > Visibility
- > Sense of Humor
- > Courage
- > Fail Fast

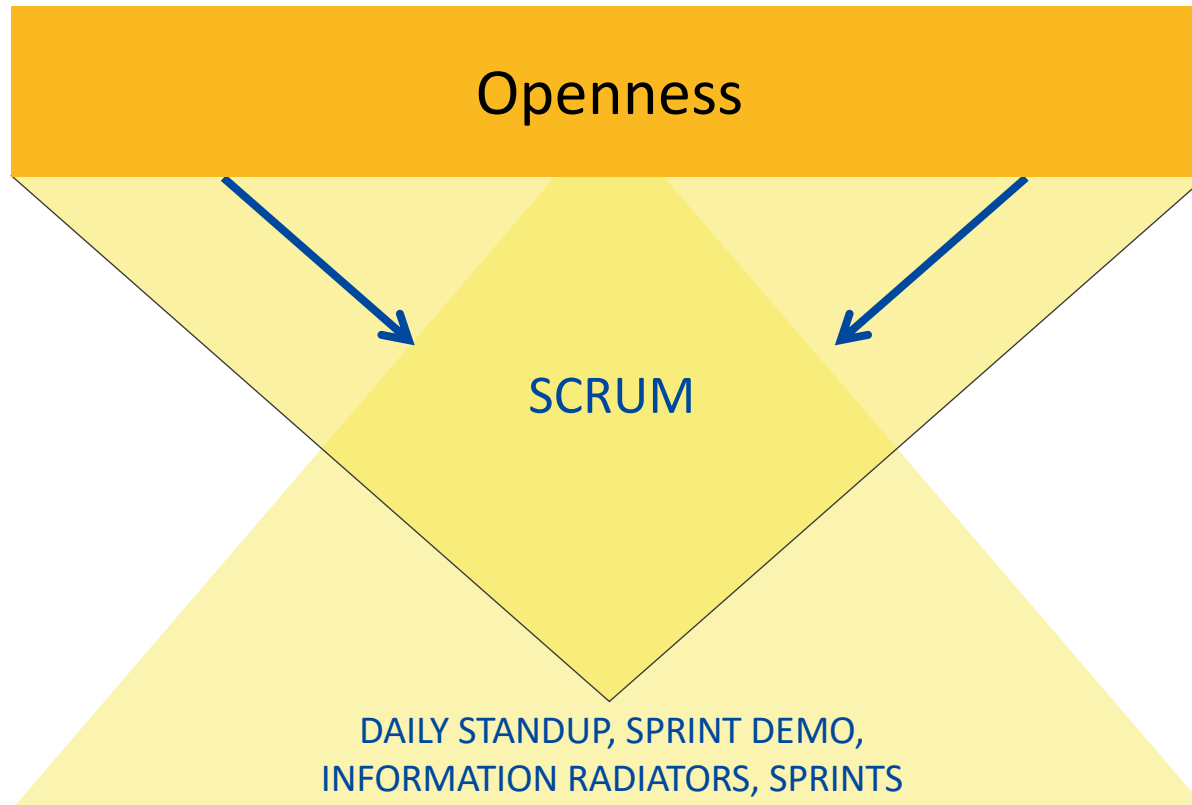
Leading



*As an agile leader,
I will to define, deploy, project, deploy, and sustain agile values,
So that my team understands the expectations for organizational agility*

Leading

How-ability Model

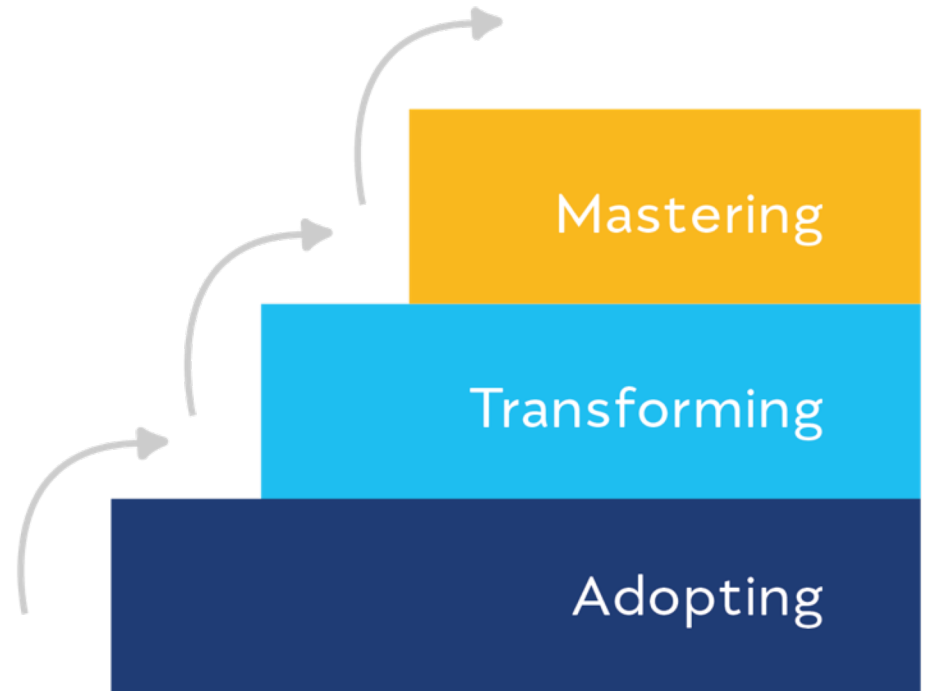


Leading: Valuing

Objective	Adopting (Shu)	Transforming (Ha)	Mastering (Ri)
As an Agile Leader, I want to define, implement, and sustain Agile Values So my teams understand the expectations of an Agile organization	1. Agile values are defined 2. Agile roles and authorities are defined 3. Agile ceremonies and techniques are defined 4. Agile teams are trained	5. Essential stakeholders are engaged using agile values 6. Agile Leaders are trained to live Agile values 7. Agile values are displayed so they are prominent throughout the organization	8. All Agile leaders are engaged according to agile values 9. Visual management systems are used to display penetration of your agile values 10. Agile values are reevaluated, adjusted, and improved over time

*As an agile leader,
I will to define, deploy, project, deploy, and sustain agile values,
So that my team understands the expectations for organizational agility*

Providing





Providing



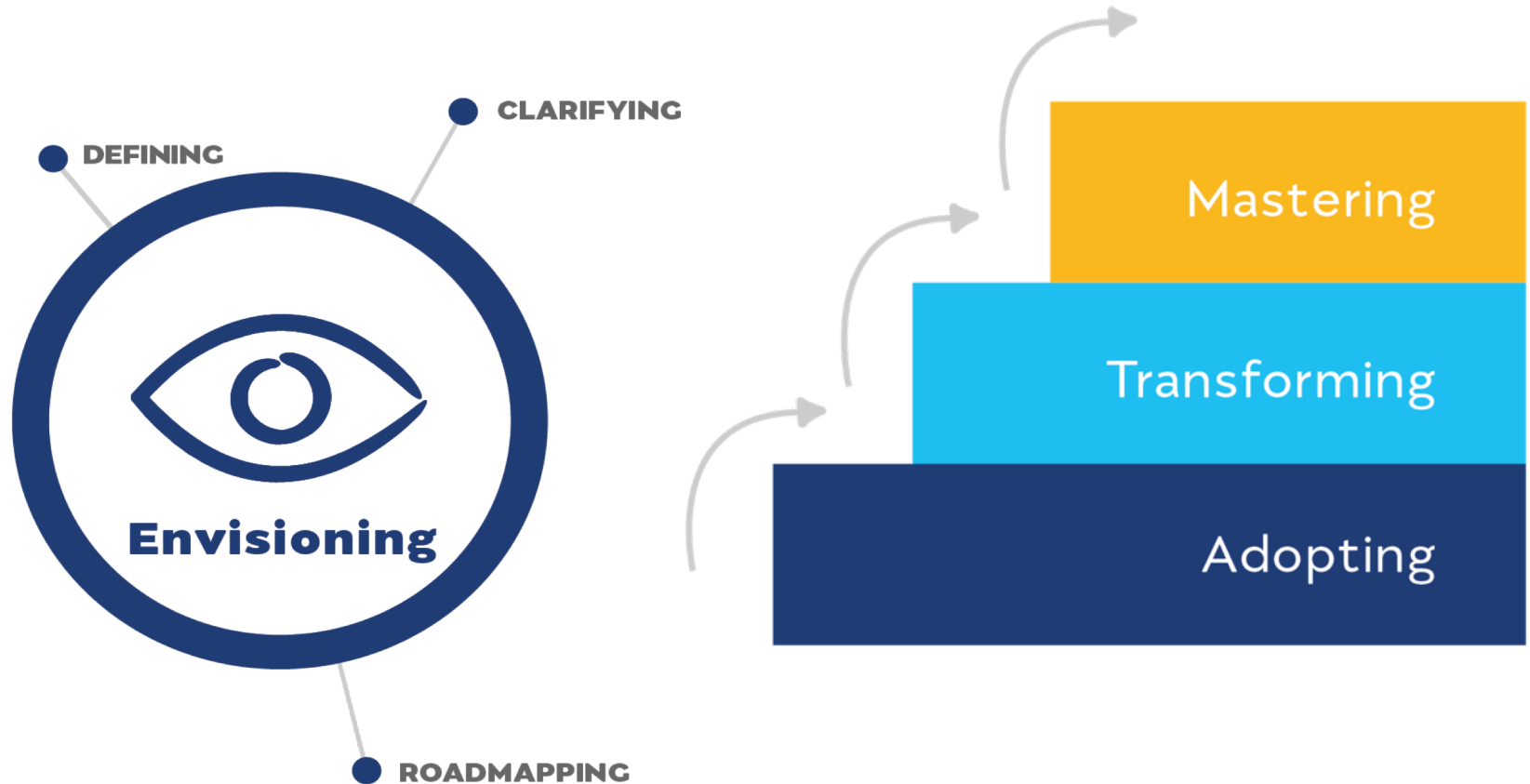
*As an agile leader,
I want to define relationships and agreements between teams and internal/external partners and suppliers,
So that I can extend the capabilities of my agile teams.*

Providing: Partnering

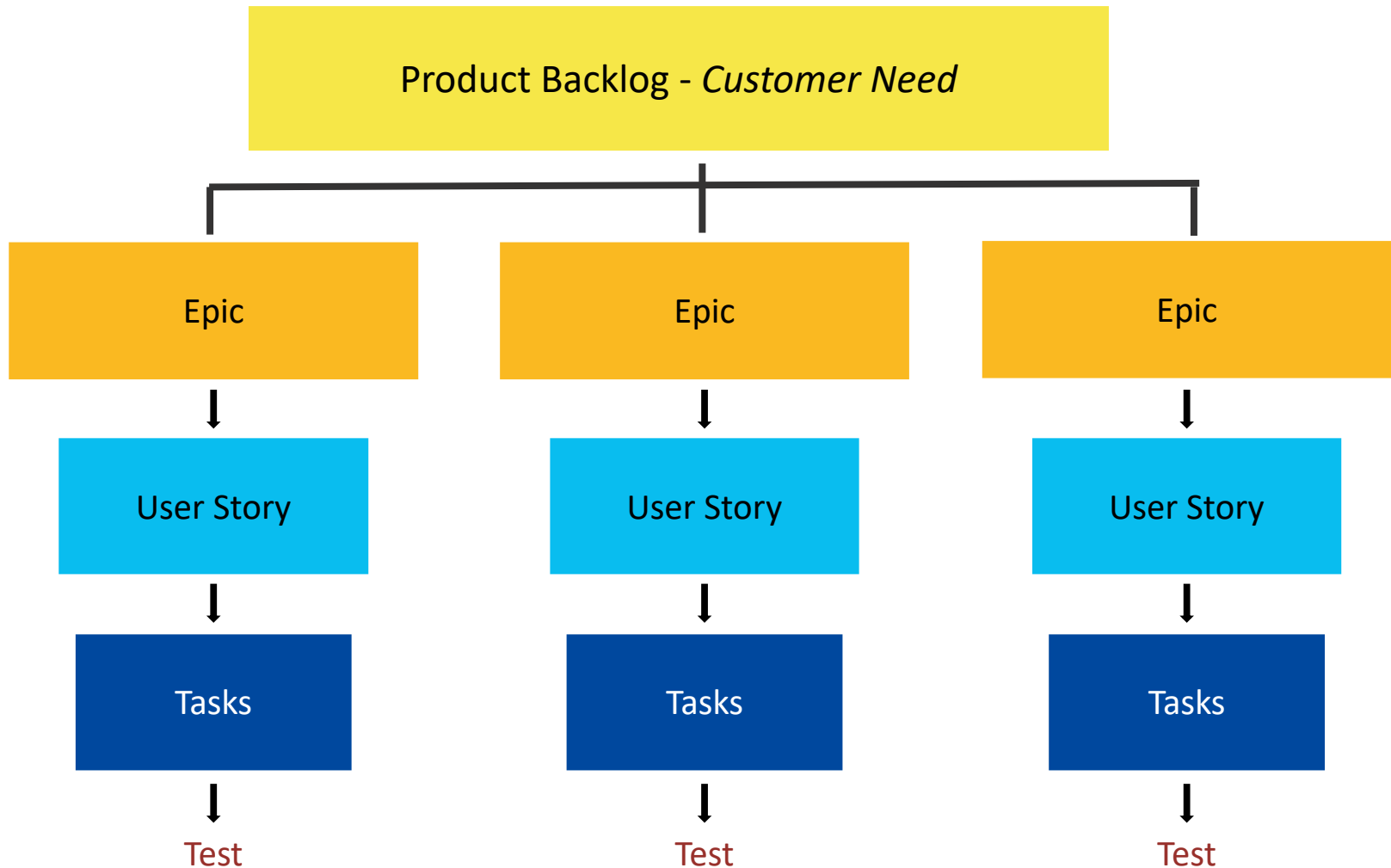
Adopting (Shu)	Transforming (Ha)	Mastering (Ri)
1. Multiple potential Agile Partners identified	5. All key stakeholders are engaged	
2. Evaluation on Agile Partners was performed using criteria	6. Training provided for internal stakeholders on agreement alignment with Agile methods, lifecycles, deliverables, and contracts.	8. Partner evaluation survey performed post agreement
3. Establish agreement with Partner that aligns with Agile methods and lifecycles	7. Ensure partner agreement aligns with Agile methods, lifecycles, and deliverables	9. Preferred partners are known and understood
4. Develop partner communication plan		10. Deploy agreements to all suppliers and partners that interact with delivery teams

*As an agile leader,
I want to define relationships and agreements between teams and internal/external partners and suppliers,
So that I can extend the capabilities of my agile teams.*

Envisioning



Envisioning



Envisioning



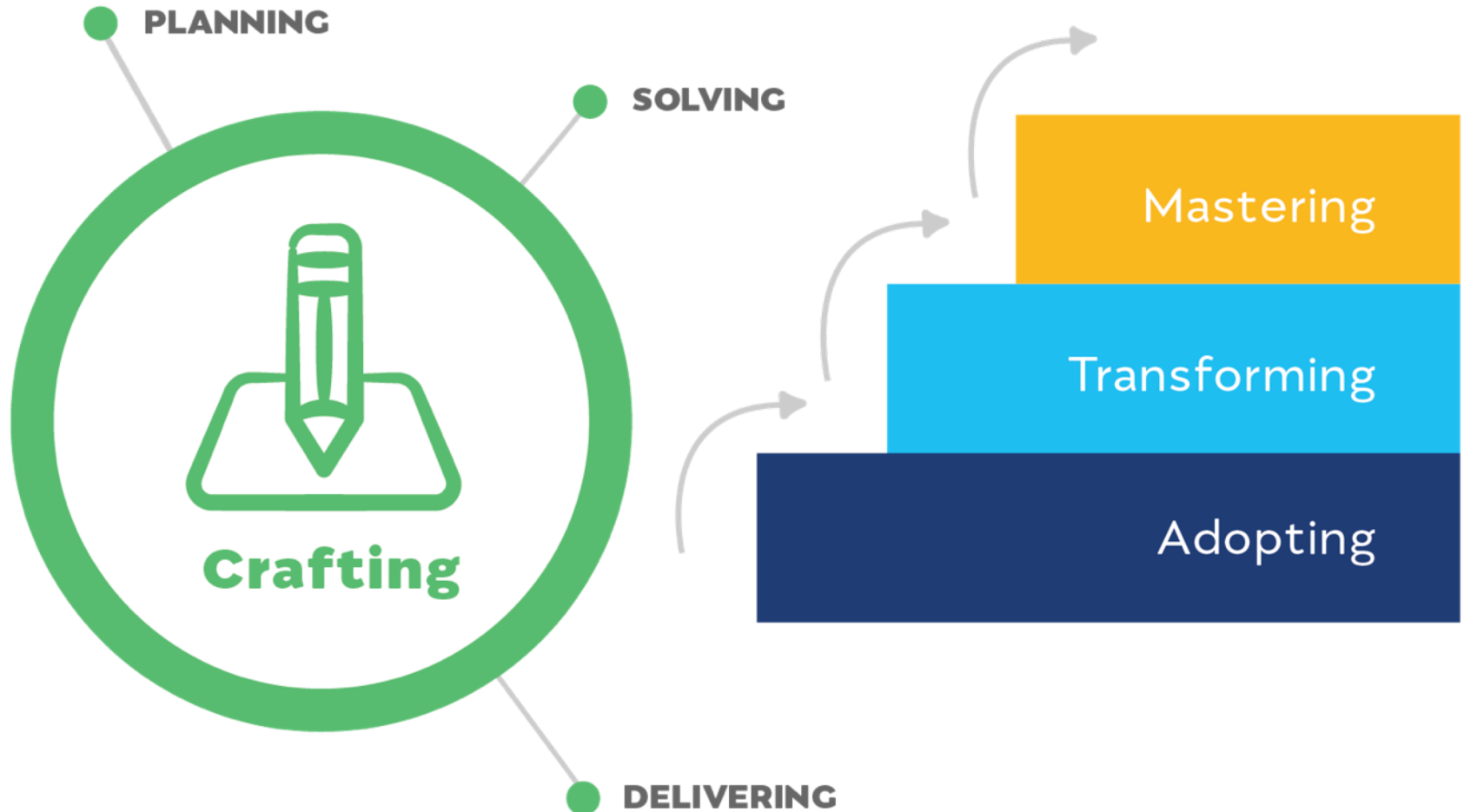
*As a Product Owner,
I want to transform customer needs from the product backlog into epics and user stories,
So that agile teams can develop the product in an iterative and incremental fashion.*

Envisioning: Clarifying

Adopting (shu)	Transforming (ha)	Mastering (Ri)
1. Agile team members are trained 2. Product Backlog representing Roadmap consists of requirements and epics	3. Product Owner engages with Agile team 4. Product Backlog consists of epics and user stories 5. Product Backlog items prioritized, sized and tagged to a Release	6. All Product Owners engage with respective Agile teams 7. Product Backlog consists of epics, user stories, acceptance criteria, and definition of done 8. Clarifying ceremonies and techniques are improved and expanded over time

*As a Product Owner,
I want to transform customer needs from the product backlog into epics and user stories,
So that agile teams can develop the product in an iterative and incremental fashion.*

Crafting





Crafting

Craftsmanship, it ain't just for coding anymore

- > Think about something you own or like that has craftsmanship



Lean Startup, it's not just for startups anymore

- > Lean Startup should be the core of any craftsmanship initiative



Ceremonies, if one doesn't exist, craft your own

- > Turn process into behavior by applying agile values



Crafting

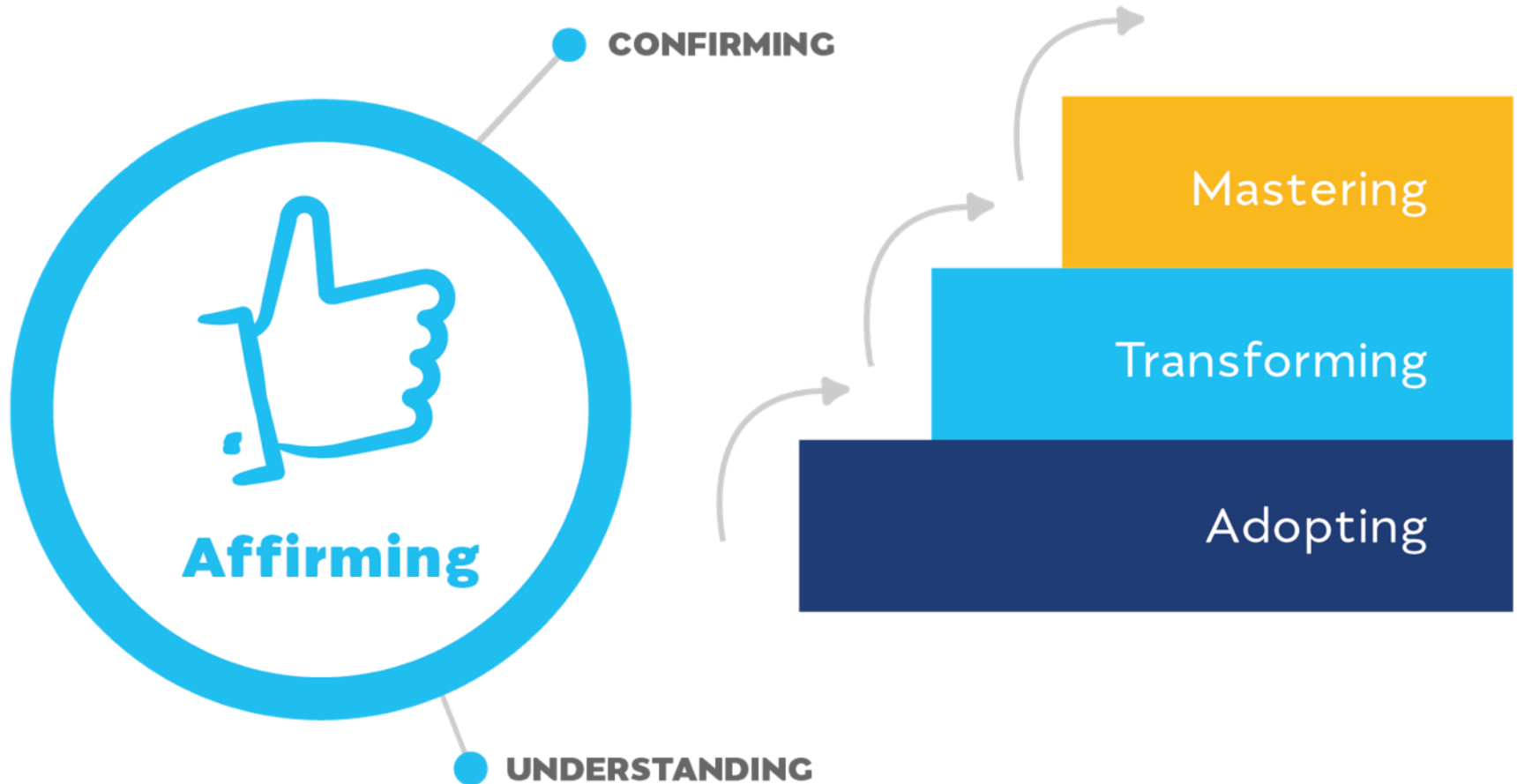


*As an agile leader,
I want team members to integrate and test the solution effectively,
So that it meets the needs of the customer and end-user.*

Crafting: Delivering

Adopting (Shu)	Transforming (Ha)	Mastering (Ri)
<ul style="list-style-type: none">1. Projects use defined delivery ceremonies and techniques2. Agile Values are demonstrated during delivery3. Project team members are trained in the defined delivery ceremonies and techniques	<ul style="list-style-type: none">4. Essential delivery stakeholders engage with projects using Agile Values5. Agile Leaders are trained in the delivery ceremonies and techniques6. All projects use defined delivery ceremonies and techniques	<ul style="list-style-type: none">7. Projects select delivery ceremonies and techniques based on project needs8. Agile Leaders engage with projects using Agile Values9. Delivery ceremonies and techniques are improved and expanded over time

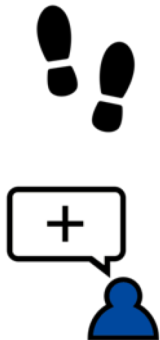
Affirming



Affirming

Confirming

- > As an agile leader,
- > I want to visit, observe, and evaluate my Agile Teams,
- > so I can **confirm** their adoption of agile values and techniques



Go to the Gemba!
“Walk the Talk”
Team Feedback

Understanding

- > As an agile leader,
- > I want to collect, analyze, and report useful metrics,
- > so I can **understand** the performance of my Agile Teams



Goal, Question, Metric
Information Radiators
Retrospectives



Affirming



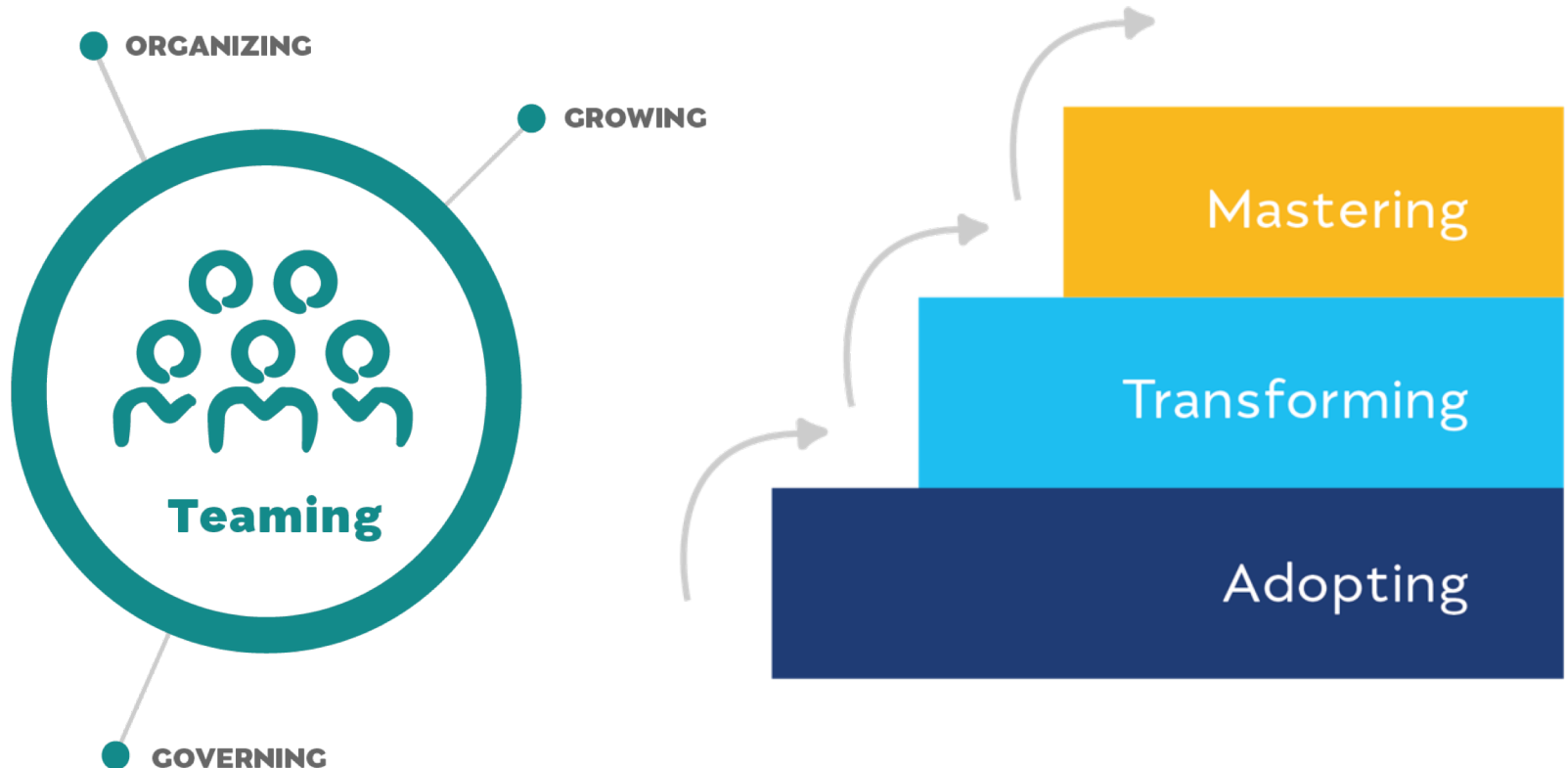
*As an agile Leader,
I want to evaluate how well team members adhere to agile values, frameworks, and techniques,
So that I can understand where there are opportunities to improve team performance.*

Affirming: Confirming

Adopting (Shu)	Transforming (Ha)	Mastering (Ri)
<ul style="list-style-type: none">1. Agile Coach is assigned to each Agile Team2. Agile Coaches are regularly observing and evaluating Agile Teams3. Agile Coaches are regularly providing feedback to Agile Teams and Agile Leaders	<ul style="list-style-type: none">4. Agile Leaders regularly observe their Agile Teams5. Agile Teams identify and implement performance improvements based on the feedback they receive from Agile Coaches and Agile Leadership	<ul style="list-style-type: none">6. Agile Coaches identify best practices and team improvements that can be shared across Agile Teams7. Enterprise Retrospectives utilize feedback from Agile Coaches and Agile Leaders to improve performance across Agile Teams8. Agile Leaders use data to confirm that their Agile Teams are adopting Agile values and techniques

*As an agile Leader,
I want to evaluate how well team members adhere to agile values, frameworks, and techniques,
So that I can understand where there are opportunities to improve team performance.*

Teaming



Teaming



VS



Roles are “energized” by exercising accountabilities*

* Derived from Holacracy by Brian Robertson © 2005

Teaming

Julie	Jeff	Ross	Julie	Rob	Patty
Planner	Instructor	Coder	Facilitator	Marketer	Cataloger
Scoping and estimating projects	Designing training materials	Selecting technologies	Scrum Mastering	Creating Market Buzz	Maintaining Service Catalog
Identifying Risks	Delivering classes	Designing Solutions	Facilitating Workshops	Conducting Sales Calls	Processing Change Requests to catalog
Tailoring Plans	Capturing Feedback	Writing Unit Test Cases	Leading Peer Reviews	Maintaining the CRM	Evolving Proposal Template
Specifying Measures	Assessing effectiveness	Codifying Solutions	Resolving Impediments		Controlling
Defining Environment		Leading Spring Demos			
		Attending Agile Ceremonies			

Teaming



*As an agile leader,
I want to support an infrastructure of people, processes, and tools,
So that agile teams have everything needed to be successful.*

Teaming: Organizing

Adopting (Shu)	Transforming (Ha)	Mastering (Ri)
1. Physical space and culture is conducive to team collaboration, communication and focus	4. Teams establish charters consistent with the culture and values of the agile organization	8. Teams self organize based on the organizational Agile culture defined and Leaders can measure performance
2. Teams have the right mix of cross functional experience necessary to support agile development	5. Cermonies and techniques are available to all projects	9. Projects optimize performance using accessible tools and techniques that are visible organizationally
3. Teams establish standards and ground rules	6. Teams begin to own their agile environment	10. Agile teams integrate or synchronize with other teams and groups as needed to become a Team of Teams
	7. Team environments reflect agile values	

*As an agile leader,
I want to support an infrastructure of people, processes, and tools,
So that agile teams have everything needed to be successful.*

The Agile Performance Hierarchy



Evaluating Your Organization

		Foundational Agile Keys			Performance Levels		
Performance Circle	Holon	1 - Roles	2 - Ceremonies / Techniques	3 - Actions	Adopting	Transforming	Mastering
Crafting	Planning	Yes	Yes	Yes	Adopting Outcomes	Transforming Outcomes	Mastering Outcomes
	Solving	Yes	Yes	Yes	Adopting Outcomes	Transforming Outcomes	Mastering Outcomes
	Delivering	Yes	Yes	Yes	Adopting Outcomes	Transforming Outcomes	Mastering Outcomes
Color Key:		Green = Foundational Agile Key Verified			Bronze = Adopting	Silver = Transforming	Gold = Mastering

The Adopting Performance Level for has been **achieved** for Crafting

Behavior changes as teams grow

守 破 離

shu

obey
fundamentals
repetition

ha

detach
self recognition
innovation

ri

separate
creative technique
transcendence

Behavior is what makes us GREAT!

AgileCxO.org



> Agile Leadership Podcast series



> The Agile Performance Hierarchy



> Agile leadership blog



> Agile leadership lightning lessons



> Performance models, training, and certifications for agile organizations

Thank you!



Thank you for attending!

Visit AgileCxO.org

For more information about Assessments,
Certifications, and Training: agileleader@agilecxo.org