Organically Growing Internal Coaches
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Agile 2009 Conference
August 24-28, 2009
Chicago, Illinois
Outcomes

• Understand Intuit’s “Agile Done Right” (ADR) to see if it is applicable to your organization

• Understand the syllabus of topics for coach training or advanced training for agile enthusiasts

• Understand some of the tools & templates that Intuit uses to help its coaches
Agenda

• Coach Training – What we are solving for
• Training Performance Objectives
• Training Overview
• The Value of a Coach

About the Training

• ADR Fundamentals
  – Selecting & customizing the process
  – ADR Mindset & Principles
  – Heart of the ADR Model – Iteration 0, Recurring Iterations (Scrum)
  – Meeting-Driven Conceptual Model

About ADR

• Training Topics Revisited
• Coaches Toolkit
  – Iteration 0 Meetings
  – Recurring Meetings
  – Assessments
• Summary
Coach Training – What we are solving for

A critical mass of excellent internal, project-embedded SW practitioners & coaches

that can customize & facilitate the usage of the Agile Done Right (ADR) process

to repeatedly & predictably produce high quality products

especially on projects with rapidly changing or unknown customer or technology requirements
Performance Objectives

At the end of this training, the “new coach” will be able to:

• Sell the value of agile to the troops & senior managers
• Understand common adoption resistance patterns & reduction strategies
• Use strategies to avoid the most common implementation mistakes
• Explain how to prepare & to facilitate each of the dozen meetings (e.g. who to invite, time management techniques, input requirements, output measurements)
  – Special emphasis on SW Process Selection & Kickoff, Process Customization, Done Definition, Story Point Estimation, & Release Launch
• Use rules-of-thumb regarding key agile management practices, such as iteration length, size of team, # stories/iteration, etc
• Recognize “bad” user stories and know how to fix them
• Use measures to improve ScrumMaster’s personal performance
• Set up a War Room & Scrum Board
• Optimize work with distributed agile teams
• Describe how to effectively integrate ADR projects with corporate standard tools

Prerequisites
• Experienced a successful agile project, or
• Is a trained Scrum Master, and
• Has good general coaching or facilitation skills,
• Good Management of Change skills

Training will provide the knowledge & skills that an experienced Agilist needs to coach a project
Training Overview

- Two Day multimedia training (multiple ways to learn)

- Topics Include:
  - A model for understanding & explaining ADR
  - Selling Agile
  - Major areas of resistance and strategies to resolve them
  - How to use the Coaches Toolkit
  - How to drive a dozen different key meetings leading up to the launch & during each iteration
  - Creating a War Room
  - Rules of thumb for customizing projects
  - Coach tips throughout
  - Agile Tools

- After training Support
  - Coaches Toolkit
  - Master Coach
  - Coaches Community

The new coach walks out with knowledge PLUS the materials & support they need to coach
The Value of a Coach

**Business Value**

- Repeatable, lower-risk projects by selecting & customizing the right process
- Improved project quality & schedule confidence by executing the process right
- Greater productivity, fewer obstacles, lower costs by doing what works & avoiding what doesn’t

**Coach Added Value**

- Improved project quality & schedule confidence

**Responsibilities include:**

1. **Working with & supporting the team in achieving their project goal**
   - Co-planning & facilitating key meetings
   - Consulting with team members & analyzing data to recommend & implement improvements
   - Advising management of significant, potentially risky deviations from ADR standard practices

**Coach required for all teams**

- **Full-time coach** for teams new to ADR; engaged on a daily or weekly basis
- **Part-time coach** for experienced teams

**Master Coaches**

- Train & mentor other coaches
- Are “regular” coaches of project teams too; never let the tools get rusty – keep at least one foot in the trenches

**Not solving for the Perfect Process**

SW Coaches have already proven to accelerate business value & project success

Agile Coaches do the same
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6 Slides
SW Development Framework Selection
(What are you optimizing for?)

There is flexibility with

“Waterfall-like” &
ADR
To

Traditional SW Engineering mindset

Requires an Agile mindset

Agile Principles & Practices in a more standard Project Management Framework

Customize Your Process

Agile Project Management

Stories & Story Point Estimation

Light Req’s with traditional Estimation

Iterative Waterfall with some Agile practices

Iterative Waterfall

Waterfall with Iterations

Waterfall Type Processes

Customize Your Process

Choose the best methodology based on business conditions and project characteristics - Agile is more & more frequently the right choice

Agile practices can be implemented from a book Agile mindset shifts are more quickly achieved with the help of a coach

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Agile-Done-Right Mindset & Principles

**Agile Manifesto**

- Individuals and Interactions over processes and tools
- Working Software over comprehensive documentation
- Customer Collaboration over contract negotiation
- Responding to Change over following a plan

*While there is value in the items on the right, we value the items on the left more.*

**Agile Principles**

1. Early Value
2. Change Welcome
3. Frequent Delivery
4. Daily Collaboration
5. Motivate & Trust
6. Face to Face
7. Working SW
8. Sustainable Pace
9. Technical Excellence
10. K.I.S.S.
11. Self-organize
12. Reflect & Adjust

The “difference that makes the difference” is the Agile mindset shift. The Agile Manifesto captures that spirit with each point being brought to life with actual Intuit stories.
The heart of ADR is "Iteration 0" + "Recurring Iterations". Iteration 0 consists of Architecture, Requirements, UI, & Dev Infrastructure.
Meeting-Driven Model

"Coaches Toolkit"
Prep Instructions
Checklists
Agenda
Meeting Materials
Tool Interactions
Examples
Resources

Eliminate Process-speak; Everybody "gets" Meetings
Resources provided to "roll your own"
Scrum Process

Vision: ROI, Releases, Milestones

Emerging, prioritized requirements

Sized in Story Points

Sized in Task Hours

Daily Standup Meetings

Product Owner

Cross Functional Scrum Team

New learnings, Unfinished stories, Defects

ADR adds “just enough” extra structure to the standard Scrum Process to make it more viable at Intuit

Product Release Backlog

Iteration Backlog

3 Weeks of Development

Demo & Retrospective

New functionality is demonstrated at end of Sprint
“Lessons Learned” weaved into the process model; With the initial help of a coach – it becomes “business as usual”
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4 Slides

DR Fundamentals
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- Heart of the ADR Model – Iteration 0, Recurring Iterations (Scrum)
- Meeting-Driven Conceptual Model
Training includes a huge set of ADR topics with supporting materials & taught in many different formats
The new coach walks away with a “holy grail” of materials that are easily navigable with an interactive, hot linked Mindmap.
ADR Tools & Templates

- Coaches Toolkit
- Internet Repository
- Vendor Tools
- Iteration Length Selection Tool
- Team Survey Processing Tool
- Scrum in a Quickbase
- Scrum in a Spreadsheet
- Capacity Planning Spreadsheet
- ScrumMaster & Product Owner Checklists
- Outlook Appointment text
- Meeting Agenda Templates
- Retrospective Template
- Team Survey Template
- Story & Iteration “Done” Template
- Code Jam Checklist
- Scrum Room Banner Text
Summary

- **Coaches** are key to **accelerating product development** excellence
- **Coach training** is necessary to sustain the coaching model
- **Agile Done Right (ADR)** consists of a small set of customizations to the Scrum model that help optimize its use at Intuit. Key elements include:
  - **Iteration 0** – Architecture/High Level Design, User Centered Design Work, User Story Refinement & Story Point Estimation, Infrastructure and Planning Prep
  - **Recurring Iterations** – the Mid-Iteration Review and Thin Slice Burdened Activities Meetings are included to ensure activities happen that may get lost in the grind of getting stories done
- **Meetings** as a **conceptual process model** makes the methodology **easy** for everyone to understand
- The **Coaches Toolkit** with its templates, checklists, meeting materials, actual Intuit examples, etc makes the process easy to recall, understand, and execute