

So you wanna Agile

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0:00:05.3 Announcer: From the Washington DC Chapter of the Project Management Institute, this is PM Point of View, the podcast that looks at project management from all the angles. Here's your host, Kendall Lott.

Kendall Lott: Hello, PMs. And here we are with installment number two of the sneak preview of the 2023 UMD Symposium. Today we're talking Agile, but on April 20th and 21st, you could be even seeing this in so much more in-person or online. 50 sessions, buckets of PDUs and multiple tracks, people and projects, federal programs, performance management, leadership, and communications. Whoa, and wait for it, Agile DevOps, hence today's guest list. Sign up at pmsymposium.umd.edu soon and come and meet like-minded colleagues discussing practical insights for implementation, when you get back to your office or your bedroom or your over the garage office or whatever it is you have. That reminds me, you'll get that chance to come and meet people that you know, the like-minded people that you wanna be with in the flesh. It's worth the price of admission. So we'll see you at the symposium. With that, co-host Mike Hannan and I wanna start up with our guests for today's topic, so say you want a Agile. We have with us today, David Forsyth, Mike Mellane, and Caitlin Kenny. Hello to all of you. And let's get our voice cues out here so we know where everyone sounds like here. So David, how are you doing and where are you calling from?

0:01:23.1 David Forsyth: I'm David Forsyth. I'm doing great. And I'm from Washington, DC.

0:01:29.3 KL: And Mike. Mike as in Mike Mellane. Where are you calling in from today? How are you doing today?

0:01:35.6 Mike Mellane: Doing great, thank you. I am Mike Mellane. Yes, I'm calling in from Phoenix, Arizona.

0:01:40.6 KL: From Phoenix. Alright. Thank you. Nice and dry there, I assume.

0:01:44.2 MM: It is. It's quite nice.

[laughter]

0:01:46.9 MM: Full of people watching golf and football this weekend as well.

0:01:50.1 KL: We had the pleasure of a record-high low overnight number, so that was interesting. It was warmer overnight than it is in the middle of the day, so there you have it. And Caitlin, how are you doing and where are you calling in from?

0:02:02.2 Caitlin Kenny: I'm doing great. Thanks for having me today. I'm calling in from Bethesda, Maryland, so just outside Washington, DC.

0:02:09.4 KL: And Hannan, Michael Hannan. We're calling you Hannan today. Where are you

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calling in there? From Bethesda or Salt Lake?

0:02:16.5 Mike Hannan: From Bethesda. So Cate and I probably are like shouting distance from each other. Who knows?

0:02:20.9 CK: Yes. [laughter]

0:02:22.7 KL: We probably should have put you in the same room and made all of this technical stuff a little bit easier, but we managed to figure it out, right? Fail fast is what I keep hearing. So I managed to fail a few times really fast there very, very quickly this morning. So, you all have the presentations that you'll be getting into during the UMD Symposium, but I'd like each of you to lay out, not so much your presentation, but your point of view on project management and Agile that has informed what you decided to talk about in your presentation.

0:02:50.3 DF: I'm happy to jump in. Just to give a little bit about my background and point of view. I'm David Forsyth with a company called Artemis Consulting, which is a small business based in just outside DC, and we do almost entirely contractual with the federal government doing software development, and mostly with civilian agencies. Artemis is assisting agencies with digital transformation, very small scale and large scale, and a lot of that involves modernization, migrations to the cloud, things like that. Although we're a consulting company, we also actually do the actual work. Most of my team are Java developers, Python developers, people like that, which gives us a unique perspective on the practical challenges of project management and Agile in particular, because we're not just coming to it from academic or from a formalized point of view, but from a practical point of view of actually having encountered the challenges ourselves.

0:03:47.1 DF: So, what we've been doing for several years, a lot of our focus has been on helping our civilian government clients transition, usually from some other methodology to Agile, including SAFe Scrum, and in fact, a lot of challenges there. And that's mostly what my talk will be about, is the challenges we've encountered, how we've managed to get around them, and some of them that I feel are fundamental conflicts that need to be resolved between the whole concept of contracting, strictly government contracting, and the Agile methodology.

0:04:20.4 KL: Agile and conflict. Okay, there we go. Conflict with a current environment, contracting environment. Caitlin, what's your point of view that's gonna inform your presentation, that is what you're gonna offer? Oh, tell us the title of your presentation.

0:04:33.8 CK: Yeah. The title of my presentation is actually "Multi-Dimensional Portfolio Management Structure". So looking at missions, capabilities, and systems. Also probably, actually very similar to David's point of view, but looking at it from a researcher's perspective. I am actually a current PhD student at the University of Maryland. I also have a full-time day job as a defense contractor as well. But this presentation is really looking at "How do we manage for missions and capabilities within the DOD or the whole, and what does that kind of approach look like when you have these multi-dimensional portfolios?" And particularly, from the Agile standpoint, what's really challenging is the DOD's made this massive shift to try to move software development towards Agile, but the structures in place, the policies, the guidelines, etcetera, make that really difficult and challenging from a management standpoint. I was brought up, if you will, with traditional project management techniques. And eventually transitioning over into the Agile world, the Agile paradigm. And I think there's a lot of work we have to do in that area from a government standpoint

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for sure.

0:05:39.0 KL: So the crossroads of Agile and capabilities and challenges thereof. We're back to the challenges again. Yep. I thought Agile was gonna make it all easy. So now I'm just gonna sit here and listen, but it turns out, we're talking challenges. Mike, save us.

0:05:57.2 MM: Well, I would say, just a quick intro, about 30 years of IT industry experience principally as a program director, principal program manager. Very practically-oriented, coming back to David's comment, but cybersecurity, finance, human resources, supply chain, running across the various functions. And I found myself, four or five years ago, running a supply chain portfolio as we were rolling out as a broader IT organization, as Scaled Agile implementation is very broadly large. And as part of that implementation, we saw mixed, or maybe even inconclusive results, if you will. So I'm not gonna help out on the challenges part. But we saw real improvements operationally, we saw really good transparency and execution around what I call small and medium efforts. And then we ran into, in some of these larger, more complex efforts, they really honestly just struggled.

0:06:49.3 MM: And, some of those struggles were occurring before the implementation, but the implementation of Scaled Agile didn't resolve them per se. Our paper is really titled "Hybrid Project Management Successes, Missteps and Learnings". What we're really focused on is those large programs that, and then the challenges they faced and the pure Scaled Agile approach, if you will, really seemed insufficient in resolving those challenges and where we needed to reframe and recharter some things. And so, some of those programs came through successfully and others didn't. You'll have to tune in to figure out, or hear what, what we learned and what we think is critical to get some of these larger projects landed successful.

0:07:33.4 KL: So what I just heard there was, go big and sometimes also go home. So, thank you for not helping at all with that tension, that Agile creates in various environments, which are only made better when we make it bigger. So that's about the extent of my Agile knowledge other than watching Scrum teams work, which I've read is not the whole answer there. So with that, I'm gonna go over to Mike Hannan, who we're gonna officially call Hannan on this conversation.

0:08:00.8 MH: To orient the audience we've got a civilian government contract person that is coming up against challenges with Agile. We've got a defense side academic, but also a practitioner running up against some challenges in government with Agile. And then the other Mike's environment is not government, it's private sector, but very large organization in the semiconductor manufacturing industry. My guess is that the size of the organizations we're working for and the bureaucracies we're trying to navigate within, present the biggest challenges. But I wanna put that to the three panelists here. Is that true or is it truly like government procurement processes that maybe Mike has not had to deal with and he's had an easier time and fewer issues? Similarities, differences between the three environments, guys, I open it up to the floor.

0:08:49.4 DF: Well, I think there are some challenges that are probably pervasive just because, whether you're dealing with government or private sector, everyone's got a bureaucracy, even if it's a relatively small organization. I think there are some unique aspects though that come out when you have... Again, this could be either public or government, when you have a contracting relationship because part of the assumption, I think, for pure Agile, I call the academic model of Agile, is... One of the premises is a lot of cooperation. Well, there is a natural tension if you have a

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customer and a vendor. Most of the time it's one big happy family, but it is a different relationship when there's something to be exchanged back in. It's not completely consistent priorities between the vendor and provider and the customer. It's not a conflict, but it is a different situation that I don't think the original Agile model takes into account fully because a lot of the material you'll read will be talking about everyone jumping into the Scrum and everybody's available all the time and that just doesn't always happen. In addition to the fact that there's a certain accountability that has to occur when there's a client and a vendor.

0:10:02.9 MH: You just made me think of something that I'll put as a challenge to Cate here. So what David just described sounds to me like where the Scrum Guide tells us fully dedicated teams are the way to go. What I've seen in models that, especially at larger scales that flow value quite faster, is understanding how to synchronize those key resources that might be the true bottleneck of the overall system. And make sure they're giving that individual teams exactly what they need when they need it, in a focused manner, until their part is done, rather than skipping around. But what do you think about that, Cate? Do you think... What about that tension between fully-dedicated team members and the desire of the organization to share certain resources? It's maybe too much of a luxury to just give that one awesome resource to one team only for the next year or whatever?

0:11:01.2 CK: Yeah, it's funny, I think, in my day job, we run into that challenge all the time. Resource constraint is a big issue. Knowledge spaces, and centralization of that knowledge is really difficult. Ideally in Agile you have these really highly skilled cross-functional teams that have everything they need internal, but working in a large-scale complex system of systems and working across these capabilities and major portfolios, you don't always have that. And there are a lot more stakeholders to manage and a lot more dependencies. So it can definitely make that challenging for the teams internally. But I think one of the biggest challenges I see is that, the more complex the system becomes, the more communication pathways we have, the more context switching we have, if we have people split across those things. And fundamentally that's gonna increase your whip. And that's gonna affect your cycle time and your overall throughput. And that's just, that's a hard concept for people to accept and grasp, but ultimately that does slow you down in the long run. I think what you mentioned of synchronization of teams is a great example of, I think, what some of the larger scale frameworks try to do. But ultimately, I think where folks run into challenges is commitment to that idea and then execution of that in practice can be two very different things.

0:12:20.5 MH: Yeah. In fact, you just cued me up perfectly to take this over to Mike. Since you were doing Scaled Agile in a large organization environment and you came across some challenges, to what degree did you face these exact synchronization challenges across all these moving parts?

0:12:37.0 MM: Yeah, I would say, from a team dedication standpoint, I think that was readily achieved. We still obviously had to do skills, but the teams were, I think to Caitlin's point, we used to call it "T-shaped skills". We had people that had multiple skills and that helps as well. But I think we were largely, a high percentage or a high mix of our teams were fully dedicated. But the interesting thing for us, and Caitlin's comments, it was very challenging to manage the prioritization signal, into these teams and really have it funnel. And asking for a one to end priority at the top list, worked for a while, but then it breaks down 'cause there's way too many competing priorities coming into the teams and you gotta fix this. So even our business stakeholder was challenged in coordinating the conversation into, what was basically not enlarge trains, if you will.

0:13:36.4 MM: And I guess the only other thing I would say, an angle to our challenges, maybe

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somewhat related to that was just the fact, at that portfolio level we ran into organizational conflict and I felt myself translating a lot between how we were wanting to operate from an Agile, Scaled Agile perspective to the corporation who wanted to do budgeting a "different way" than the capacity based budgeting would say. We're constantly doing this translation between the broader environment of the corporation versus how we wanted to operate and it was pretty consistent. Yeah, there was a lot of translation that had to go on between how we wanted to operate and how the corporation wanted to hear from us as well.

0:14:17.8 MH: So, you touch upon budgeting as one of those conflicts where, that's a common one that the Agile world faces, where the typical bureaucratic annual budgeting process, we're refunding "projects" as opposed to ongoing product lifecycles, is fundamentally a conflict. But SAFe tries to come up with some answers for that. Did that whole dilemma itself also conflict with your prioritization challenge you just mentioned?

0:14:43.5 MM: Yeah. Well, coming back to the resource, it certainly made the resource capacity management part of that conversation much more difficult, 'cause you had projects, 60, 80 projects coming in that you had to understand the scope and scale of it and map that to your teams. We were strong advocates for capacity-based budgeting, but that fell on deaf ears. Even the folks that had sponsored the move to a Scaled Agile framework would then come back and ask for project line items. And go to a more traditional Waterfall way of looking at that. And it's definitely challenging, 'cause it was like another... It was a version of the translation I was referring to earlier, for sure.

0:15:23.8 MH: I have a quick follow-up on that. When I imagine 60 to 80 initiatives and all these synchronization, prioritization, budgeting, capacity, yeah, resourcing, all that. Was that solved more or less by you just basically sticking your finger to plug the leak in the dam every time you saw it spring?

0:15:43.4 MM: That's pretty close. Yeah. And a lot of... Even our systems, some of these more Agile-based project planning systems and there was a lot of just manual work to express prioritization into the capacity and then having more of a backlog conversation, capacity conversation versus a project line item conversation. That became a critical part of that annual budgeting conversation and priority for sure.

0:16:13.6 KL: David and I share political science background and I wanna go back to his opening comment because we went there with the concept of scale and size. And is this a dedicated staff or not? David, I heard something else in your comment about some of the conflict that might be happening here, which is that it's a principal-agent problem, it's a political science problem in other words. When you're using contractors, you have people acting on your behalf. And then there's the question of, "So how's that handled?" Are you finding that a problem? I don't know that it's just a size problem. I'm wondering, do you think that it's insurmountable in a meaningful way? Is it okay to hire people from the outside to help you get your work done? You've got your own points to the customer in the room and then you've got these hired hands.

0:16:58.8 DF: Yeah. I don't think it's unsolvable at all. And one of the things that we've been successfully solving at Artemis is bridging that gap and resolving that. I think there's maybe a fundamental challenge, but not an insurmountable one. And I think that the word I used before that is important is accountability. Of course, all organizations need to have accountability. But when you have an arrangement between, as you say, a hired hand, a consulting organization, and an

agency or a corporation, there has to be some sort of agreement before that relationship begins on "What's the arrangement? What am I getting for, for what I am?" And at least early when we were transitioning government agencies to understand Agile better, a contracting office dealing with our corporation would say, "This list of things you need to deliver." And we'll say, "Well, that's not Agile. You don't know ahead of time exactly what's going to be delivered. We're gonna work that out."

0:17:47.3 DF: And there are huge advantages to this iterative development and deciding two years ahead of time what's going to be delivered is very unsuccessful in most cases. They'll say, "Okay, so what are you delivering?" And for a while it was like, "Well, it's whatever we all agree on." And then one contracting office will say "Okay, 500 bucks and whatever we get," but in the end, that doesn't work. And I reluctantly agree they have a point. Especially if you're in a world of fixed price contract where all you have to hang on is what gets delivered. So that's something you have to work. What we've found is that, we have to find a situation where that side of the equation gives a little bit, has to have a little bit of flexibility. And that's taken time, it's taken training. And it's taken, frankly, the government people getting more acclimated to something that has been going on for a while now.

0:18:40.6 DF: But I would say that the other part of the equation that needs to give a little are what I would call the Agile evangelists, the ones who, "Okay, it's gotta go exactly by the book, literally the book." Literally what I learned in my MBA classes, "It's gotta be exactly this way." And that invites conflict as well. That's why in our company, as I said, we have the advantage where we're consultants, but we're not just doing it from an academic standpoint. We understand the practical constraints, limitations, etcetera. And I've had people, these Agile purists, when I say, "Okay, what are we gonna do on the roadmap? What are we gonna deliver in three months?" And they'll say, "That's a few Sprints away, we can't talk about that." Well, planning ahead can't be a crime. You can't be successful with planning ahead is a crime. So both sides have to give a little.

0:19:28.8 MH: Hey, so let me take that and rub with it a little bit, David. In my mind, I guess, like Cate I was brought up with traditional practice on large space systems development programs. And I saw the benefits of a lot of that, but also a lot of the downfalls and the misfires, let's say. Happened to go into software engineering before the Agile Manifesto was a thing. And we were all living and breathing these new methods that were made possible by the ability to tear things down easily and rebuild them quickly and component-based development, all that, all that good stuff. And what struck me going through all that was, the projects that failed were the ones that just didn't have very clear objectives stated, or the ones they were clearly stated, but weren't meaningful and purposeful to the people that are being asked to execute them.

0:20:13.7 MH: And I've found, if you get that right, almost no matter what method you might be in, sure, some methods are absolutely better than others. Caitlin mentioned context switching and managing width, and all these other things that the Agile world has embraced, hopefully more than just the Agile world has embraced over the years. But fundamentally, how much of this can be solved? In fact, I'm seeing this in DOD especially, "Hey, we have a clear objective. It is urgent. There is no question about what the priority is. We gotta go solve it. I don't quite know how, we may need to iterate on it. This may take a couple of attempts, but by Friday that better be solved." And it works, that guaranteed always every single time. But boy, the effectiveness just seems to spike. So, let's see. Caitlin, you're closest to the defense world here, what do you have to say about that?

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0:21:02.0 CK: Yeah. It's interesting you bring that up. It's definitely been a challenge. It's a major culture shift. That's not the way we plan our work, traditionally. When you look at the decision support system within the DOD, you have an acquisition system, you have a capabilities and integration system, you have a planning, programming and budgeting system and they all work separately and somewhat independently from each other. And so the iteration of those decisions across those cycles or those systems take a really long time to flow down. And so, I think that's how you end up in the case where you have multiple priorities that sometimes are out of date or aren't quite aligned with what the current need today is.

0:21:44.6 CK: And we see that, really, when it comes to some of the reporting structures and some of the GAO reports that are coming out. "All this Agile stuff is great, but how are you measuring it? How are you managing it? How do we know that it's actually more effective by old delivery cycles or old delivery methods?" And so it creates a really interesting paradigm shift and culture shift because it's challenging the way that we approach requirements, development, the way that we approach work breakdown, the way that we approach targeting a priority, a priority. Priority is singular. We have this bad habit of saying priorities. And priority actually just means one, you can't have multiples. And so, it's just a massive culture shift in the way that we think and the way we execute work.

0:22:30.8 MH: So have you seen the case where there's just obviously some urgent defense priority where the priority is clear, the objective is clear, the sense of purpose and achieving the objective is strong and it just gets done?

0:22:44.1 CK: Yeah. Typically we see those during periods of war, unfortunately, where we're on high alert, there's an emergent mission need. When you think back to some of the current conflicts that are ongoing, in the last couple of years, you'll see decisions getting made of, "Nope, we just have to figure this out. We have to solve this problem and we have to solve it now." I think you also see it in other cases, unfortunately, when things go wrong. When things break, when things crash, when things blow up when they're not supposed to, when people get hurt or killed. Those are areas where we tend to be reactive and storm those problems and try to solve those quickly. But unfortunately, that's a reactive shift, or that's a reactive decision model. And ultimately, that's not where I think we wanna be as a nation from a defense standpoint. Again, it just goes back to that culture shift of understanding that, defining your requirements 10 years ago, they're probably not what you need today. And your budgeting process being three years out or more, probably isn't going to align with what you need when you get there. And so there's some major shifts that have to happen from the policy and governance side in order to enable those things so that we actually can be agile, little A, in that environment.

0:24:04.1 MH: Yeah. You remind me of a saying that former Secretary of Defense, Donald Rumsfeld is quoted from early in the Iraq and Afghanistan wars. Over 20 years ago now. He said, "I don't think Al-Qaeda has a five-year budgeting cycle."

0:24:19.4 CK: Nope. [laughter]

[overlapping conversation]

0:24:22.0 CK: They don't. [chuckle]

0:24:23.8 MH: We gotta have more agility here. We gotta have more, I like to use the term power to the edge, decision-making to the edge, a bit more autonomy, a little more freedom to act.

0:24:31.2 CK: Yep.

0:24:32.3 MH: And that hits right at what David was saying earlier. Well, not if you have a procurement officer that's trying to make sure the rules are followed. So, I'm gonna take this to you, Mike. The semiconductor industry has been a very volatile space the last, especially last year or so, the macroeconomic uncertainty of course contributes to it, the COVID stuff certainly contributed, supply chain contributed, the Ukrainian war contributed. But do you see a pattern here where, in trying to get ahead of all this volatility and not going to react mode, as Caitlin said, just so you know that, we have to iterate our way through this, but in a very deliberate, concrete way with solid objectives we all can agree on, we need to protect our teams and keep them stable in the midst of all this volatility, have you seen any of that in your sector?

0:25:21.6 MM: No, absolutely. Both from, I would say a broader industry and economic perspective, which you just highlighted and then maybe some more specifics. From a company perspective, there's a lot of clarity right now on what's the most important thing that we need to be working on, which certainly helps. And so, very much helps with that regard. It's just one of the things that, part of that last conversation that, well, we'll look at our challenges, across some of these more complex things. It was really interesting to us. Obviously, it was some of the decisions or lack of decisions maybe earlier on in those phases. And the best remedies or the most impactful remedies that we saw were all methodology agnostic. It was just PM 101, I call it eat your vegetables kind of stuff, everything we know we should be doing, but sometimes through PACE. And maybe it's the natural mindset of, "We gotta go," but it's like, there is a good space to pause and reflect on what we're gonna do and then go execute. And so, I'd look at it as a balance.

0:26:23.4 MH: Well, I found something you just said there super encouraging and maybe a huge lesson for all of us listening here. And that is, in the face of all this volatility and uncertainty, we don't have to choose react mode, we don't have to go into mad scramble mode, as I like to say. I forget exactly how you just said it, it helped make prioritizations even more clear. I don't think that that's normal. I don't think most organizations operate that way, certainly not the ones I tend to see. But they can choose a different way. And offer their team some stability in the midst of all this tumult and actually drive some real success forward, even though the broader environment is still giving us all these challenges. One more thing with all this. I think it was you David, who talked about the purists.

0:27:09.0 DF: No offense to the Agile coaches. Some of my best friends are Agile coaches.

[laughter]

0:27:14.2 CK: I'm not a, purist, so I'm not offended.

[laughter]

0:27:18.7 MH: Purity by itself sounds nice. But you make me think of a story. It was early in my own self-employment, part of my career and I was trying to get one of my first clients, it was really

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important to try and land this and go on with my career trajectory. And this CIO was very grumpy, very gruff. It was his boss that was high up in the state government that was forcing him to talk to me in the first place. So he really didn't have much patience. And he gets on the call and he says, "Look, this is gonna be a very quick call. In fact, I have exactly one question for you. All of you consultants come in with some default solution that you have in your back-pocket that is the one you turn to no matter what the problem is. What's yours? And I said, "Well, believe it or not, sir, I actually don't have one." He goes, "Nope, nope. Now you're lying. All of you come with some sort of angle or bent or preference or all you have is a hammer, everything looks like a nail kind of philosophy."

0:28:18.5 MH: And I said, "Well, honestly, sir, that's not me. In fact, that's exactly what I'm here to try and combat. I think there's goodness in a lot of these things that are grounded in sound management science, but being zealous on one over another blinds us to that sometimes." And he said, "Okay, prove it." And I said, "Well, do you have a copy of my book right there?" 'Cause I happen to know that his boss had put one on his desk. He says, "Yeah." I said, "Open up to chapter nine." And so he does. And the title of chapter nine was "Fight the Zealotry". So I don't have any problem with purity. I do have a problem with zealotry, when it works against practical ability to achieve real business results. So I'm curious, what do you guys... Let's see, let's open it up, who wants to comment on this dilemma of zealotry versus taking really solid things grounded in good management science, but maybe in a way that is not anywhere in any guide, maybe hasn't been tried yet, might not be a good idea, it might not work?

0:29:13.1 CK: I'll take that one. My other hat, in addition to PhD student is an Agile coach. So I'm not offended, I'm not a purist. But I think for us, in the teams that I get the opportunity to work with, I think that change is hard and humans have a really difficult time when they're told to change. I don't like being told what to do and I'm sure most other people don't either. So it definitely helps, I think, in the standpoint of helping to meet folks where they're at and helping to understand each other's problems and what you're trying to solve. Because chances are really good that if you're working on a complex system or a complex problem, you have a good understanding of what your challenges are and just helping people to break down those barriers that they think are immovable or unchangeable.

0:29:58.2 CK: So there's lots of different approaches and ways to do that. And Agile is really great at that inspection and adaptation piece, that full transparency piece using data to help you make decisions. And so it's really great in that aspect. But I think sometimes it gets a bad rap because folks think that you have to be committed to one particular framework or one particular approach in order to be successful. And just speaking from my own experience, we use anything and everything if it's gonna help our teams. If we wanna try something different, we help facilitate that and help them figure that out and then reflect upon how well that worked or didn't work. I think that the benefit or the goodness across all of them, there isn't one silver bullet solution to this and each organization is going to be unique in what those teams need in order to be successful.

0:30:43.7 DF: That's really well put, Cate. And I think the best implementations reflect what you described, which don't always happen in organizations. But I think the key is, as you're going through, particularly if you're varying from either or any of the methodologies that people might be more comfortable with, explain as you go, explain as you go why there's a benefit to this. And there's a cliché now, trust the process and don't completely... If someone says "Trust the process" and doesn't give you any reason why, that's probably a little bit of a red flag because it might mean

that's a zealot...

[overlapping conversation]

0:31:16.5 MH: I love that.

0:31:16.9 DF: It might mean a person just radical cliché somewhere. But I get very frustrated if people think that the objective of the endeavor is to do Agile. No, the objective is whatever the real objective is. Agile is one of the ways to get there. And it's very often the right way to get there, some version of it is. But if it feels like we're here to do Agile, not to build a spaceship or develop a website or solve a problem, that's probably a red flag. Now, if there's someone who's resisting using that methodology and we all think that it's a good methodology, just explain it, explain how "This is how we get to the actual objective, and maybe trust us for a little bit, if you don't get it yet and you'll see how it works."

0:32:00.1 KL: David, you just said something that threw up a flag though for me. You said it's, maybe the tension is around something that they're not comfortable with. So the question is, is the measure of the approach to take based on people's comfort and current understanding, which you resolve by saying "Let's help them understand better. Explain as you go"? Or is there in fact some level of objective reality that some methods are just better in certain cases than in my mind you just let the methodology off the hook? Or is there in fact some level of objective reality that some methods are just better in certain cases? That is in my mind, you may have just let the methodology off the hook. It's like "Whatever I'm comfortable with," and if they don't get it, just explain it louder.

0:32:42.8 DF: Yeah, that's not quite. But another example that I see a lot is even not just among the zealots, but for people like me who absolutely think that Agile applies to a great many projects, particularly software development that I work with, that fits hand in glove with that in almost all cases. I think it is dangerous to say if large traditional organizations, in my case, usually government, who have been working waterfall forever, that's all they know and they have some reasons to do so. If people think the challenge is talk them into Agile, I don't think that's necessarily the right approach. You do want to explain, but talking them into, assuming they're completely wrong in educating them or gravitating them is the answer. That's not the right approach either, because they usually have at least semblance of a point.

0:33:36.1 MM: So that's where I get back to, everybody involved has to give a little bit... I don't think there's any pure methodology that works best all the time. So thinking of the people who might not be comfortable as your adversary to be conquering, I think, is incorrect. But simply thinking that educating them and with enough education, they will come over to your side or your point of view completely, also is probably not always correct because there's often a point, like my point about accountability. And if you're in a one-year contract, you can't just say, "Oh, there'll always be another release, there'll always be another iteration." Well, there won't. And when they say, "Excuse me, but my contract says I lose all my developers on May the 3rd, exactly May the 3rd. That feels a little bit Waterfall-ish." And so you have to accommodate that within the iterative approach because they're right about the constraint, you need to take into consideration.

0:34:24.5 MH: Hey Mike, I wanna hear from you on this topic, but I'm gonna ask you to put an interesting twist in the middle of it. Let's take the opposite side. What about teams that genuinely

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need the scaffolding? "Hey, this is new to me, just give me the guide and I'll follow it. I'm sure it ain't perfect, but let me just start with something I can follow." SAFe is known for having lots of structure, lots of roles, lots of interacting moving parts and all the fancy diagrams that they have. And you have said actually you've gotten some benefit from that structure, especially at scale. So make the case for maybe not zealotry, but maybe a little bit of purity.

0:35:02.9 MM: I'll do my best. Some of my observations experiences are really similar to what Caitlin and David shared. And I would just say, not surprisingly as we began the implementation, somewhat to your comments there, Mike, with, people were learning the process, they were in their heads a little bit trying to check boxes, if you will. There was a lot of that over a couple of quarters where we're just getting oriented to what we were doing.

0:35:27.2 MH: Was that people's genuine desire to just learn something new or was that people just going through the motions to appear compliant?

0:35:34.1 MM: Interesting question and gets to where, I think, where we may be now. I think in the beginning we see the value, we think we can... "This will help." I think there was a lot of momentum, even with some of our direct business stakeholders. And so we observed some of those benefits that you mentioned again. I think, four or five years into it, we now have the second or third generation of people in the process managing it. I think my concern at this point is that, we've lost the why we're doing it. It's very robotic and mechanistic, to your point. And so, when we talked about some of those larger situational, or the larger complex programs where we saw challenges, a lot of that, that pause that I referred to earlier, just I think Caitlin mentioned it and to a degree, Dave, it's like we had to... Her recommendation and coaching is just like, "Hey, this is big and complex. Take a situational view of everything around you and tailor your approach because you can't shoehorn your problem into a one framework per se." And I think that's where many cases we fell back into a hybrid approach is what we observed. The coaching we're now giving is, it's some things of these scale in particular, in terms of the initiatives, just require that situational, engage our brains, it's more art than science at that point.

0:36:55.7 MH: What I'm hearing there is, you actually did go from, it may have been been genuine learning or genuine desire to learn initially, but still it was like "The solution is SAFe, what's the problem?" But now you're saying, "The solution may include parts of SAFe, but let's understand the problem and make sure we know what we're trying to solve." Fantastic.

0:37:13.5 MM: Exactly. Yeah.

0:37:16.9 KL: Well, I wanted to kick in here with a novice's question, 'cause I think some of our listeners may not be as well-informed as the four of you are. I learned a little bit about Agile from Mike now probably 20 years ago or 15 years ago when he first started teaching me. And then I ran into some of this Scaled Agile and I got... I love it, 'cause I see pictures and process and parts that are moving around and it's all very exciting. So then my organizational design development brain kicks in and I wanna fix it by the way. I wanna fix it. I just gotta fix all those parts. But we've had guests before and I've had clients and I have colleagues that talk about Agile transformation. And I gotta tell you, I get the word transformation is change and I'm in with the change management. But no, I don't get what Agile transformation really means. And I would love to know, is it just those of us who are the unwashed that don't know what it means? Or is there any chance that there is a variation in its interpretation out there somewhere? What does it mean to have an Agile

transformation?

0:38:14.0 CK: I'll take that one. I think it's misleading. Transformation implies that there's an end, like, "I'm gonna declare victory. We're Agile. Yay." And that's not really true. The way that we think about it with our teams is, it's a journey and we're all on this journey together and some of us are at different point and that's okay. Some of us are really early in this journey and asking a lot of really great questions and presenting a lot of really hard problems that we just don't know how to solve. And some of us are further on this journey and very comfortable with the frameworks and very comfortable with the way that you can implement these things, very comfortable with that thinking or acting in certain ways. That's normal. And so we continuously... Again, it's all about continuous improvement, we continuously come back to our teams to check in with them to figure out where they are on this journey. And it's neverending. It's continuous. It's not "Tomorrow I'm gonna declare Agile transformation done, and peace out." That's not how that works.

0:39:20.9 KL: So Caitlin, what I'm hearing there is it's like a saturation of learning about understanding how to do Agile. So for you, the concept of transformation is you never get there, but it's that the organization begins to use more and more of it because it makes more and more sense to the people using it. It's a function of people being saturated, being dense with the knowledge, understanding and then executing with it.

0:39:41.9 CK: I think it's been, in some of those fundamental principles from the Agile manifesto. And I think that you need both, but I think that depending on where you're coming in the problem space, you're going to address those things in different ways. And so when I say it's a journey, I see both for myself and our teams, we flip between doing and being and we're continuously trying to improve and work both those things hand-in-hand.

0:40:10.1 MH: I love that. That's a great way to think about it. It also gives people a little bit of the space they need to find their place on that journey. Because even the most expert among us hasn't... There's always things yet to be mastered, yet to be discovered, yet to be improved. And so, obviously if we haven't learned something yet, we can't be doing it yet. So to give ourselves a chance to actually learn it and then be it, as you said. So that's... Hopefully our listeners here, if you're a little bit earlier on your Agile journey especially and you're feeling like everyone is, the train has left the station and you weren't on it. Not true. You've got a perspective, it's valid. In fact, that's part of the Agile values is, really respecting those closest to the work and give them the autonomy to govern how they do their work, not just follow some rote method.

0:41:00.7 MH: By the way, a quick funny story to throw in here. Kendall, when you and I were partnering together 10 years ago on some VA work, there was a great guy that ran the IT PMO at the time, but he made a classic mistake where he initiated an 18-month Agile transformation. And 18 months into this Agile transformation, there was a conference that he was the keynote speaker. And what he said was, "Ladies and gentlemen, after 18 months into our Agile transformation, I am hereby proud to declare that we are fully Agile buzzword compliant." He was basically owning the fact that he goofed and calling for a reset, right?

0:41:40.9 KL: Well, the good news is that she hit us with some gestalt there, which is that the journey is the whole thing anyway, so it didn't really matter. Gentlemen, tell me what you think about Agile transformation. Again, for those of us that are perhaps not as sophisticated in it, we keep hearing about it.

[pause]

0:42:13.1 DF: Well, that's something... It's a phrase we use sometimes, but I would agree with Caitlin, it's a little bit misleading, if you think that there's a journey where on a certain date you become Agile or you're completely compliant or in some way. And I think the way to think of it is in more recursive way to use a term from development. So the process itself of transitioning, transforming, should follow the same philosophy as Agile development, that is fail fast. So you're trying to become... You got this transformation, everyone's committed to it. Well, you try some things, don't try to wait until you know everything, implement some methods, see what works, what doesn't. Stick with things even if they're challenging. But if something isn't gonna work in your environment, take a look at it. Try to use the principles from the methodology. But maybe if there are some specific implementations that don't quite work right now, maybe you back open that a little bit, you find some compromise.

0:43:10.3 DF: One thing I've found is that, one of the problems with starting off a major effort and doing an Agile transformation is that, Agile is not as easy and not as effective when you're initiating a brand new project. In my case, we do software development, so brand new application or even a modernization where it's a brand new site. 'Cause that initial MVP, which is part of what Agile is all about, it's tough because usually there's a date by which you have something to deliver, something that is a thing. And once you've delivered that and now you're in the phase where you're constantly improving it, much more conducive to Agile. Maybe that's unfortunate because it means that early in the timeline is where you're gonna find some things that may feel like they fit very well and you have to trust that it's gonna make more sense later, Agile still works pre-MVP, but there are some more challenges there.

0:44:00.8 MH: Mike, you wanna jump in here?

0:44:02.4 MM: Yeah, I'll jump in there. Those are great comments and great reflections. I would just add really quickly, I would say our... The organization and the leader of our coaches, if you will, that was driving the Scaled Agile implementation or transformation, he had a tagline which resonated with me, which was, "Hey, mindset, skillset, toolset," to make sure that we had the right priorities. And I think the transformation behind your question, Kendall, was a lot of it is around the mindset. And so... 'Cause I think skillset and toolset are much more tangible and things like that. And so, as a very specific example and playing off Caitlin's journey, comment, even this simple idea of focusing on outcomes and business value over just output has been a journey. It's like, how do we get good at talking about business value and outcomes versus just the output of what we deliver? And to be perfectly transparent, that translates even to some of our business folks. "Give me widget A" versus, "So why?" Anyway, it's just a very small example, but it's a journey in and of itself.

0:45:10.2 MH: Yeah. And by the way, a lot of us in the... Going back long before Agile, the Agile Manifesto was signed, we had this debate inside of traditional PM communities about outputs versus outcomes. And a lot of people said, "Well, I get that one is sort of a result that you want, that you can clearly discern as desirable and sought after in advance. But really, aren't they kind of the same thing? Do we have to nitpick and split hairs?" And it was fascinating to be part of that discussion because they're not at all the same thing. And to describe a business outcome in terms that don't actually mention the solution is quite difficult for a lot of people. Take for example, your

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typical, "My project is to implement a new financial system from my organization." Well, no, your project is to solve some cashflow management problems and some financial management efficiency problems and a bunch of other problems. And those outcomes, we should be very clear about. The fact that you have a system in place and people might actually be using it, it's not an outcome. So even that, training people to basically separate solution, the solution to give you the outcome you want versus the outcome we want, it's a bit of a trick I think even for Agileists. Kendall, you said you wanted to take us home here.

0:46:27.7 KL: At the beginning, you guys opened with some of the inherent tensions in Agile. In fact, part of your presentations are gonna be cued around the different lenses of the tensions that are created by trying to use Agile or needing to use Agile, particularly at scale. I think one of the things I'm intrigued with is, how are you guys seeing the next step in terms of beginning to relieve those tensions or addressing those tensions? What are some of the higher level things people can be thinking about as they begin to take on Agile transformations or as they're trying to be part of teams that are going at scale?

0:47:00.2 MM: Good question. I would say trying to be like a glass is half full at times, some of those corporate challenges and where you're butting up against a financial process, it requires a lot of patience on our part. And those may not be insurmountable, if you will, but I don't think it decreases the value of how we plan and execute. And so, I think it's a little bit of, at least in our particular circumstances, is recognizing the change that you can make and realize those things that may be not be the high value. And don't focus on those, or take the long game on those as well. I think that that's been our perspective anyway when we're managing this.

0:47:42.9 MH: Cate, you wanna chime in?

0:47:44.5 CK: Yeah. I wholeheartedly agree with those comments. I think that inviting folks on the journey, if you will, with you is really critically important. And I think sometimes, especially DOD, the contracting folks get a bad rap or the acquisition folks get a bad rap for not being open to these new approaches or new ways of doing business. And just from my own experience and some of the research that we're working on, the success stories come in when you invite those folks that are early in the journey with you, or you invite those folks that are later in the journey with you. And so, helping to have those conversations and understand the limitations that they're working up against as well, I think, is critically important. Policy and governance and everything else aside, everybody's trying to do the right thing and they're trying to work through the existing systems. And when those existing systems make those jobs hard, pushing back on those things, asking questions and figuring out how to change them is the part that is the most challenging. But I think being partners on that journey, not just retreating to respective corners, I think, is where you find success.

0:48:53.7 MH: I love that. David?

0:48:56.5 DF: Yeah. And I think one thing that, some of this gets overlooked, maybe because there's sometimes such a... The idea of a short term mentality in Agile... It is, you're doing what's great, you're not really supposed to think about things down the road. But what things people often ignore and I've seen success when they do address it, is sometimes you have to actually change some things that are broader, like the organization, the culture of the organization, the way you think about even human resources and the way people relate to each other from a reporting standpoint. If you're gonna commit to this long-term, those are big things to change. But what I've

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found what I've seen successful on organizations both government and corporate is, you actually take into account what needs to happen in terms of interpersonal accountability, incentives, even factoring into, you'd be surprised how many employee objectives when you're going to your review at the end of the year, for people who spend all their time doing Agile, has nothing in there that even touches Agile. Not only don't they mention it, but some of the things that are in there are actually contradictory to Agile. Some of those deeper cultural things, if you're really committed to it, I think, it really helps when you take that into account and change those things as well.

0:50:10.9 KL: That was just another whole episode and a whole can of a lot of worms right there. Mike, what did you get out of this today?

0:50:18.4 MH: Yeah. I heard some common themes emerge, even though we have two folks from government, but very different defense and civilian branches of government. And then, also from the high-tech manufacturing space. And what I heard from all three of you and it conforms to some of what I've seen too, is the challenges are mostly organizational, cultural. I love the mindset first quote you had, Mike. And meeting people where they are, that this is a journey that we have to honor where people are, not just because it's more effective, but because the whole premise of the Agile credo is, trust people, trust the team, give the team autonomy. Clearly we have to also give the team some guardrails and some tools and make sure our objectives are clear, so they're not just doing whatever the heck they want, whether it helps the organization thrive or not. We want the organization to thrive. As Cate said, trust that people actually have genuine intent. It's really rare we find just evil saboteurs trying to just knock down everything we're trying to build. I won't say they're 100% non-existent, but let's not design our systems for them. Because hopefully they're just the distinct minority.

0:51:37.6 CK: Okay. [chuckle]

0:51:39.0 MH: And that we have to be flexible that there are principles that are non-negotiable just like gravity, there are certain laws of physics, laws of nature that apply here. Like the way the human brain works, and the way teams work. But outside of that, experiment like crazy. I heard David say fail fast. Let's live that. Because if we're failing fast, we're learning fast, then that's the whole point. Failure's not the only teacher, but it sure is a good one. It sure is an effective one. Those are all my key takeaways, guys, that I just thought was a rich discussion. I thank you all.

0:52:11.7 KL: I appreciate it as well. I managed to collect some great words, some great, great phrases. Priority just means one, what a great reminder. Power to the edge. Fight the zealotry. Flip between being and doing. And I'm with you. The journey milestones we have here are mindset, skillset, toolset. And kudos to the boss that's been told, of course, trust the teams. I'm very, very happy to have heard that. 'Cause one of my phrases is to promote autonomy whenever possible. So I'm glad to hear that there was an alignment to your thinking. Thank you, Mike, Caitlin and David, I think we may have taken a long walk around the destinations of your presentations. But for our listening audience, if you wanna hear their real punchlines, you need to get registered at UMD and then you can come and meet them in-person and perhaps the other presenters in-person.

0:53:00.1 Announcer: Thank you all for joining us today. And with that, I'll give our final outro. PMPs are reminded that if you've listened to this whole conversation, grab yourself a PDU by going to PMI's PDU Reporting Center and select online or digital media and manually enter provider code number 4634 and select M Powered Strategies. And enter the name of the episode PMPOV0107.

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Yes. Say you want an Agile and select ways of working in the new Talent Train. I am your sadly less than fully Agile co-host Kendall Lott signing off with Mike Hannan and reminding you to register for limited in-person seats at the 2023 UMD Symposium. And if you see me there, come up and tell me you've heard an episode. And until next time, it's not just scope, but keep on asking why and get it done.

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0:53:53.6 Announcer: This has been a Final Milestone production, sponsored by M Powered Strategies. Final Milestone.