


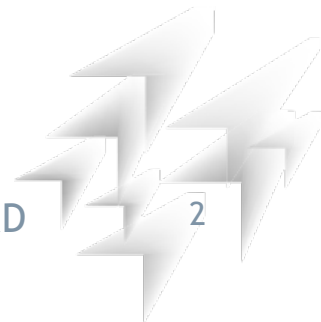
TAKING  
**COOPERATION**  
FORWARD

 June 2020

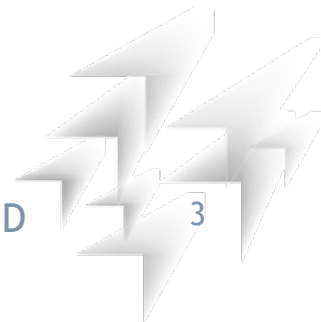
 **Agility**

 CHAIN REACTIONS, Bernhard Kölmel

1. Definition
2. Agile Manifesto
3. Development of agility
4. Agility vs. Agile Project Management
5. Waterfall vs. Agility
6. The framework trap
7. Escaping the framework trap
8. The agile Journey
9. Customer centricity
10. Employees
11. The importance of collaboration
12. Handling uncertainties
13. Agile methods
14. Continuous learning
15. Thinking approaches
16. Idea Pipeline



17. Priorization of ideas
18. Measuring success
19. OKR
20. Suitable industries for Agile
21. More or less suitable industries for Agile
22. Practice example (IBM)
23. Data and Facts
24. Stage-Gate
25. Software Applications



# 1. DEFINITION



lat. agilis = maneuverable, active, flexible

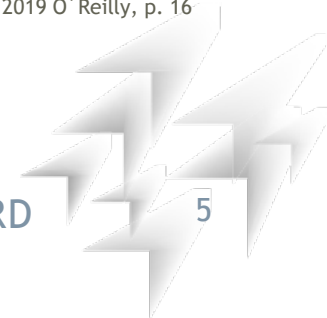
<https://www.duden.de/rechtschreibung/agil>, retrieved on  
03.08.2019



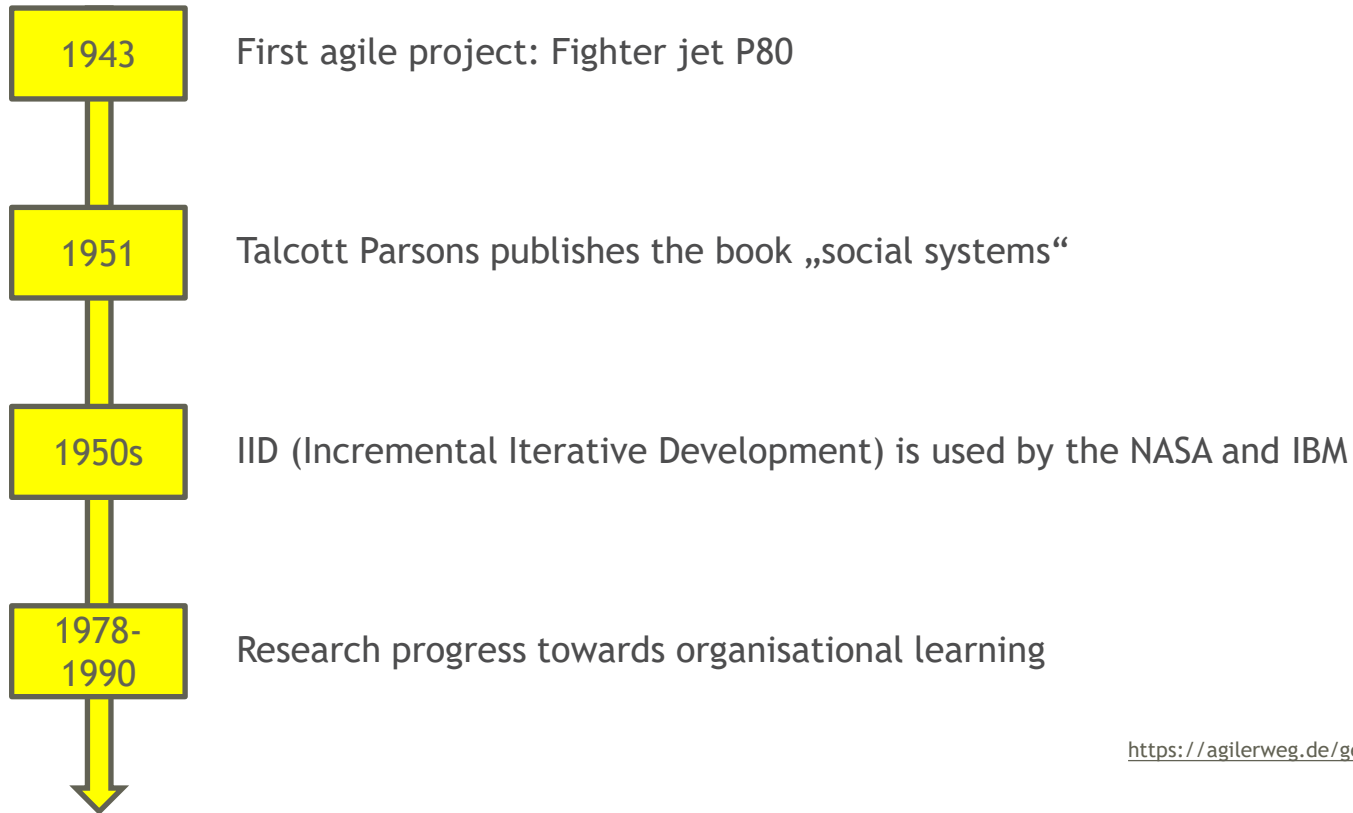
## 2. AGILE MANIFESTO

Individuals and interactions <u>over</u> processes and tools	Working software <u>over</u> comprehensive documentation
Customer collaboration <u>over</u> contract negotiation	Responding to change <u>over</u> following a plan

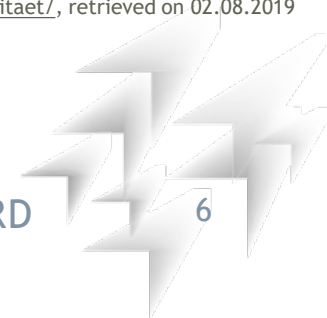
Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 16



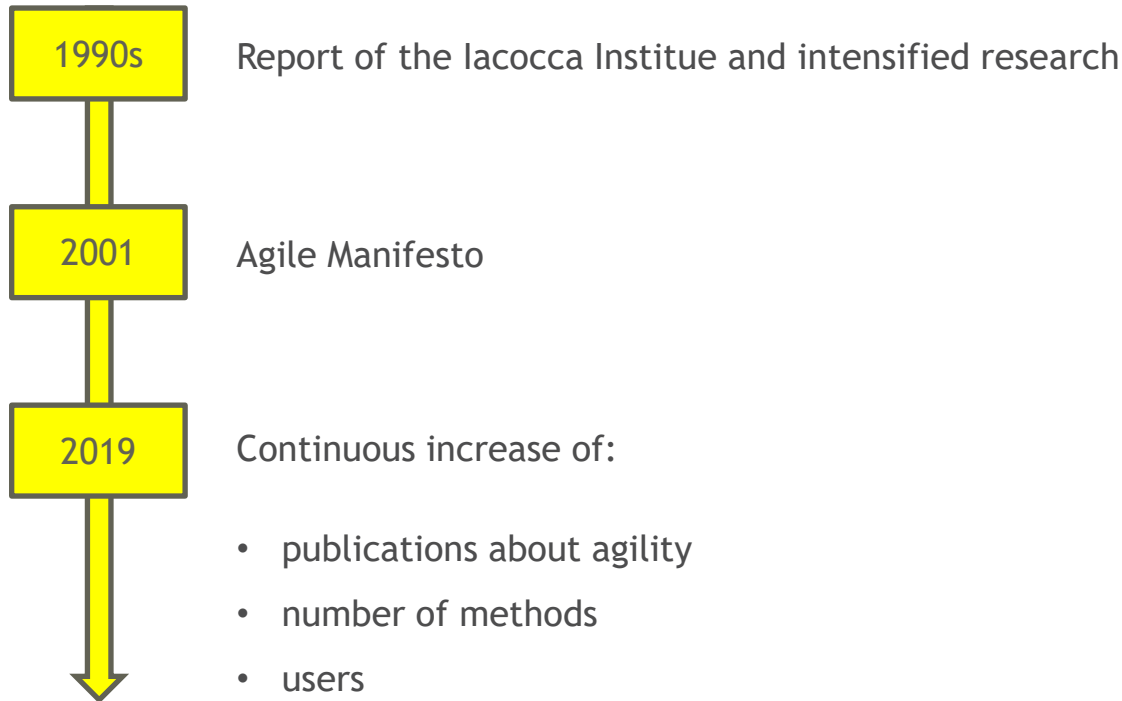
### 3. DEVELOPMENT OF AGILITY



<https://agilerweg.de/geschichte-der-agilitaet/>, retrieved on 02.08.2019



### 3. DEVELOPMENT OF AGILITY



<https://agilerweg.de/geschichte-der-agilitaet/>, retrieved on 02.08.2019



## 4. AGILITY VS. AGILE PROJECT MANAGEMENT

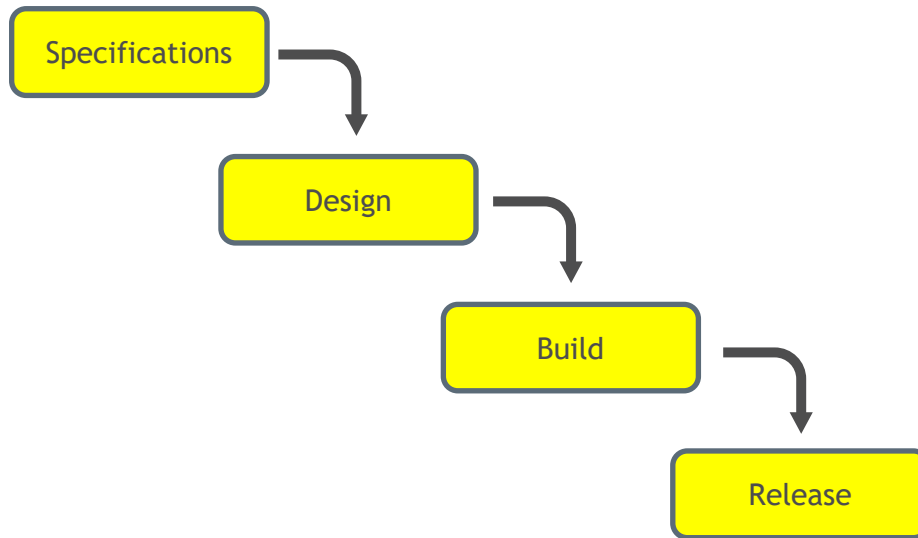
- Agile methods aren't true project management methods in the real sense
- Projects are defined by:
  - ⇒ Uniqueness
  - ⇒ Time restrictions
  - ⇒ Cost restrictions
  - ⇒ Personnel restrictions
  - ⇒ Defined result
- Agile methods are defined by:
  - ⇒ Don't focus on delivering a unique result
  - ⇒ They rather focus on a continuous flow and improvement and enlargement of a product in many partial deliveries

Source: Komus Ayelt; Kuberg Moritz: Status Quo Agile (2017) p. 7





# 5. WATERFALL VS. AGILITY



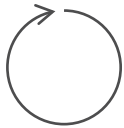
- Each stage is executed by a different team with different skills
- The plan for the product is created by a team of business experts
  - ⇒ They hand it out to the design stage
- It takes months or years until the product is finished
- The result is what initially was planned (in theory)

Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 21-22



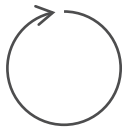
## 5. WATERFALL VS. AGILITY

Release



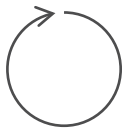
- Cross functional team with all necessary skills
- Release of small outputs in a consistent period of time => time boxes

Release



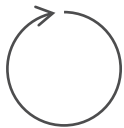
- Present and release the output to the target group and gain feedback  
=> Leads to iterations

Release



- The finished product often deviates from the initial plan

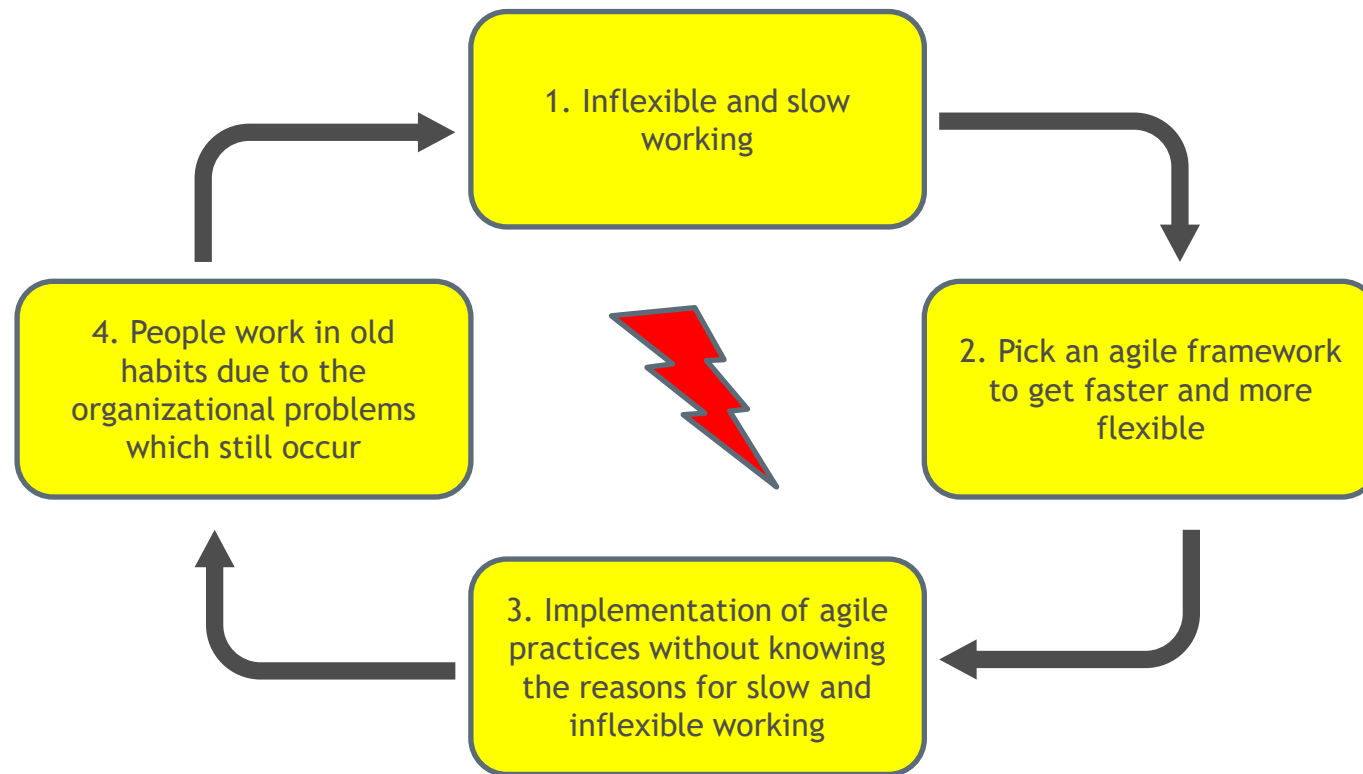
Release



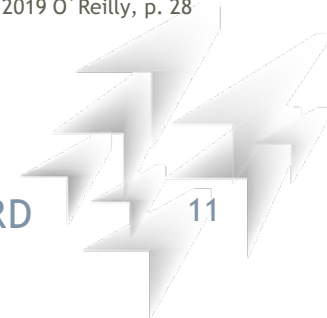
Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 21-22



# 6. FRAMEWORK TRAP



Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 28



## 7. ESCAPING THE FRAMEWORK TRAP

### 1. Make it count:

- Establish own goals and challenges
- It is not possible to implement an agile framework like an add on without analysing the current working situation
  - ⇒ What is good?
  - ⇒ What is bad?

### **Ask questions like:**

- ⇒ Why don't we reach the goals with our current way of working?
- ⇒ What is the desired future state of our team or organization?
- ⇒ What is the current state of our team or organization?

**PRIORITY**

Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 31-32



## 7. ESCAPING THE FRAMEWORK TRAP

### 2. Making it your own:

- Define the values and principles which help to reach the goals
- The Agile Manifesto can be a good option if it is specific enough for the organization
- Adapt agile guiding principles

### Ask questions like:

⇒ How can we frame the values and principles of Agile in a way that will help our team or organization meet its goals?



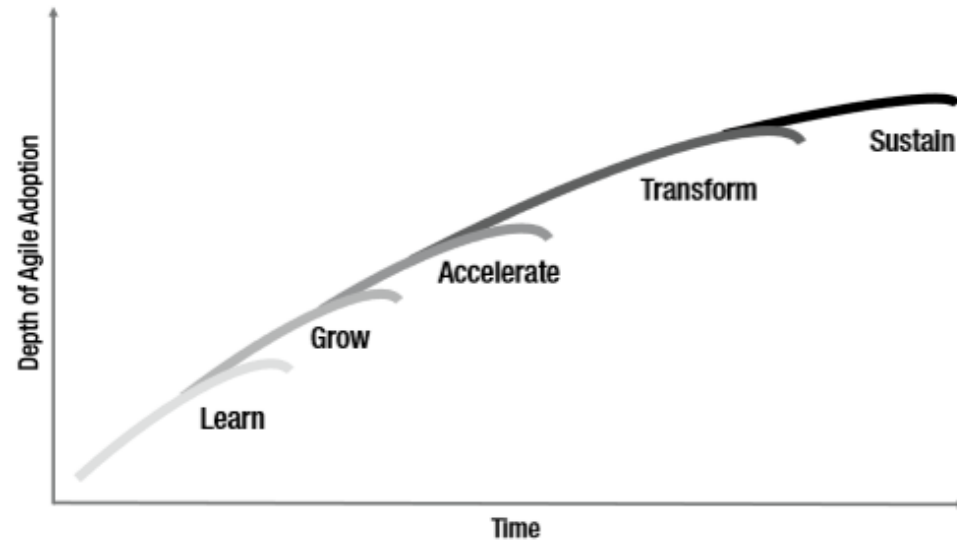
Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 33-35



# 8. THE AGILE JOURNEY



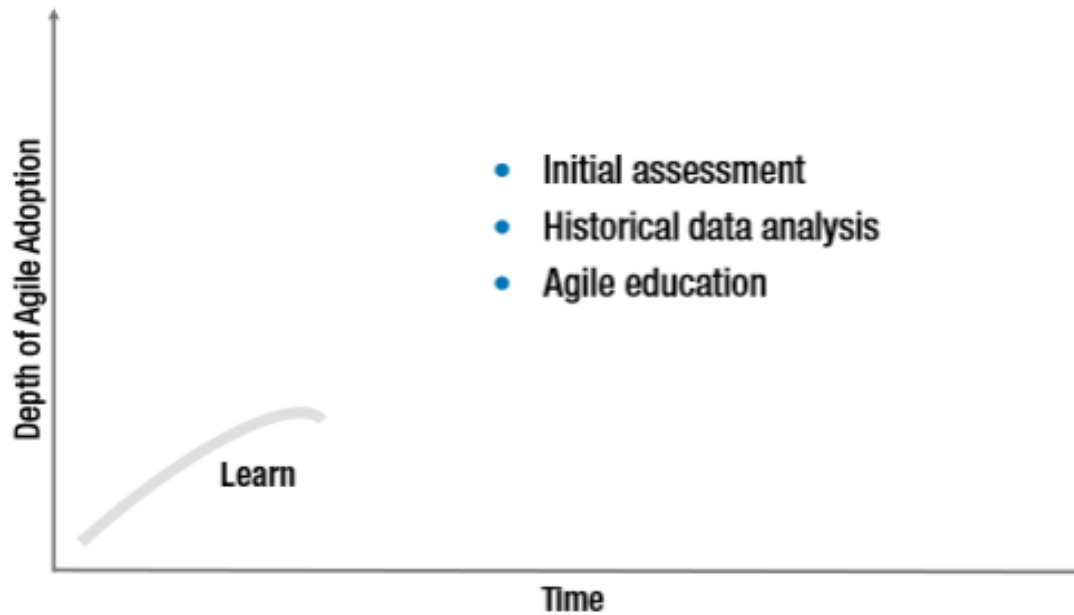
- In order to adopt agile, an incremental approach is used
- This journey can be differentiated in:
  - Learn
  - Grow
  - Accelerate
  - Transform
  - Sustain
- With every step the depth of agile adoption increases



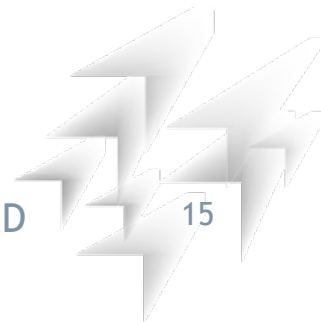
Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



# 8. THE AGILE JOURNEY: LEARN



Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017

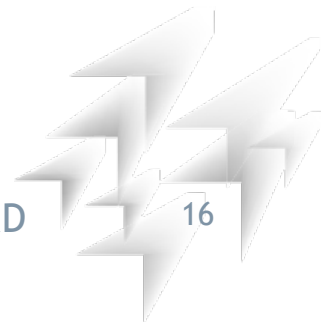


## 8. THE AGILE JOURNEY: LEARN



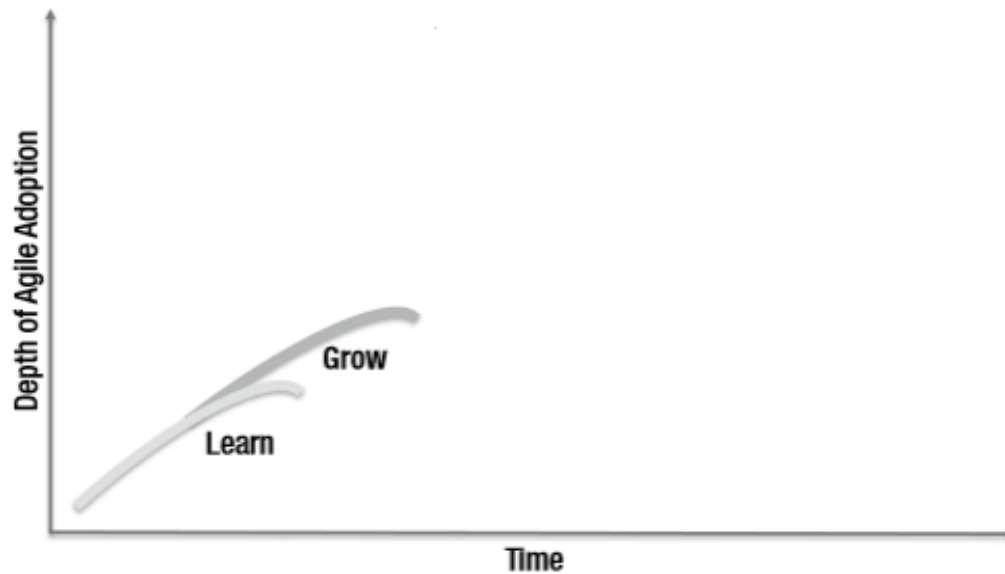
- This increment is focused on:
  - Understanding the enterprise focus on value, learning about people (employees) and offering learning
  - It starts with a baseline to understand where the enterprise is from an Agile perspective
  - There are interviews from key leaders to gauge the enterprise's focus on customer value and employee engagement.
    - Value based questions focused on how value is measured today and how that value is validated along the way with customer feedback, including base-lining existing data (delivery time etc.)
    - Employee-based questions focused on level of collaboration, ownership, motivation, enthusiasm, trust and safety

Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017

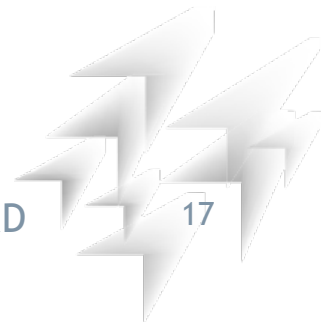




# 8. THE AGILE JOURNEY: GROW



Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017

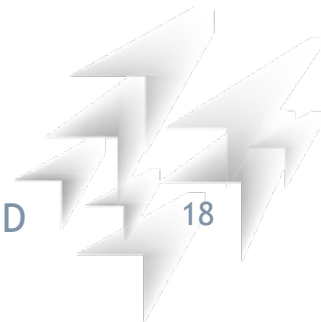


## 8. THE AGILE JOURNEY: GROW

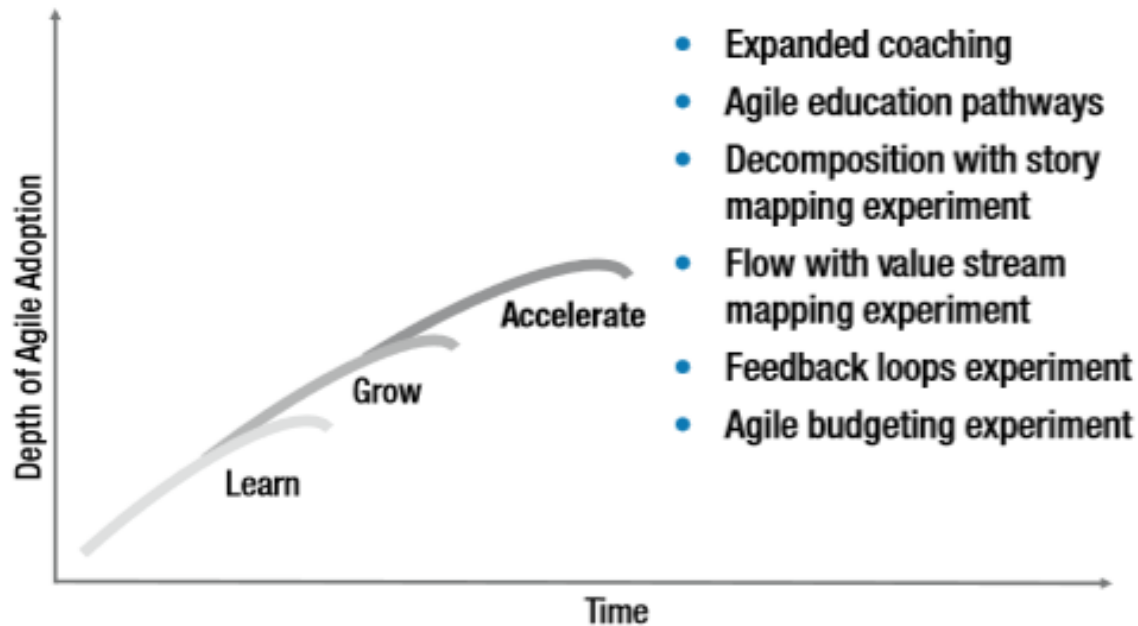


- Grow is focused on education and experimentation
- Components of this step are:
  - Coaching teams using pull signals
  - Agile coaching pathway
  - Self-organizing team experiment
  - Agile meetups and book clubs
  - Enterprise idea pipeline experiment
  - Cost of delay experiment

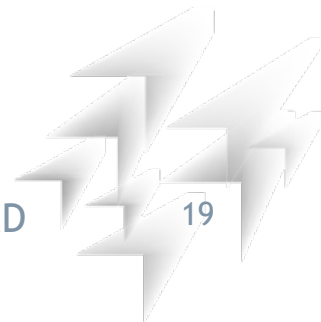
Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



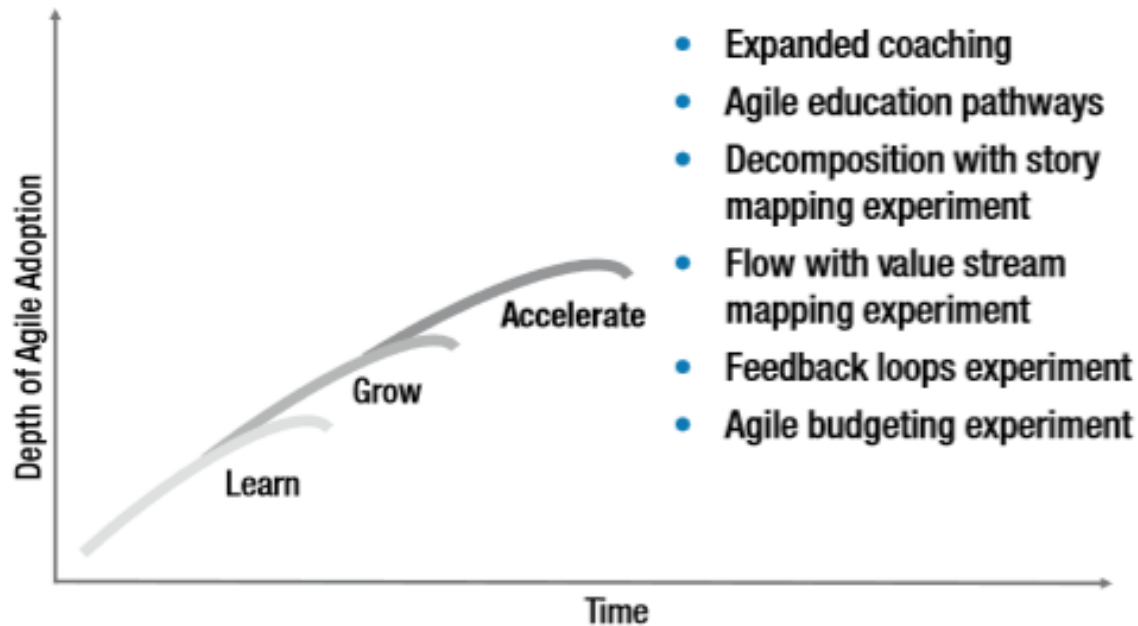
# 8. THE AGILE JOURNEY: ACCELERATE



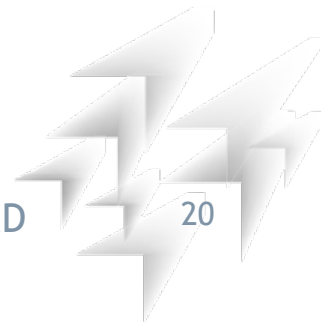
Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



# 8. THE AGILE JOURNEY: ACCELERATE



Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017

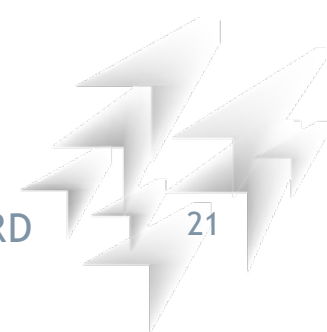


## 8. THE AGILE JOURNEY: ACCELERATE

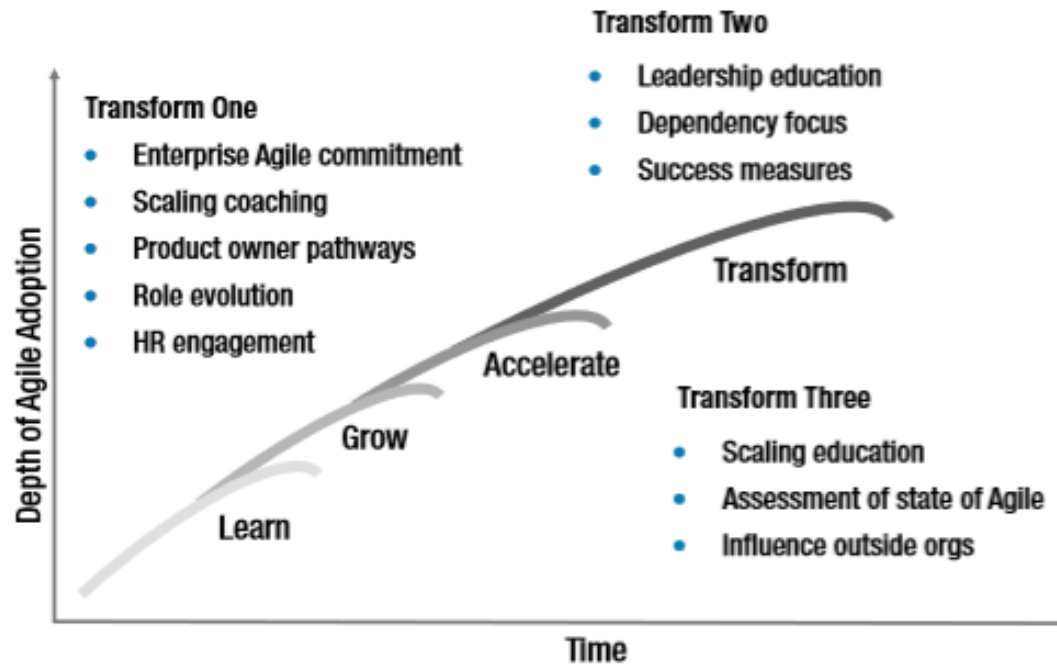


- In this step the expanded coaching and experimentation is accelerated by using the pull system
  - Further education in the form of an Agile Practitioner Pathway (APP)
    - Covering of at least eight topics over a period of similar weeks
    - Topics include the discovery mindset, increasing customer value through faster delivery (optimization of the end-to-end flow) and enhancing quality through fast feedback loops
    - After learning a topic the cohorts applied the knowledge to their own teams for greater learning
- ⇒ Experiments in the early stages of the Agile transformation are a good way to find out what works for and the enterprise

Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



# 8. THE AGILE JOURNEY: TRANSFORM



Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



# 8. THE AGILE JOURNEY: TRANSFORM

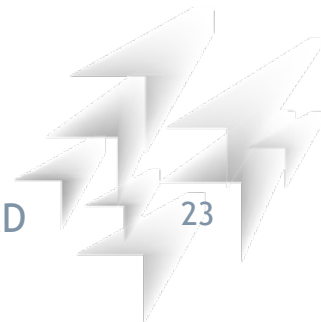


The transformation is divided into three increments

## Transform 1:

- Focus on role evolution
  - e.g. moving from project managers to Scrum Masters
- Scaling coaching
- Education for product owner
  - Understanding customer with personas
  - Identifying value with Costs of delay (CoD)

Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



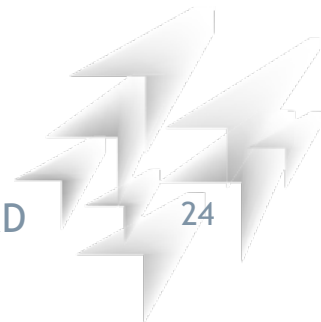
# 8. THE AGILE JOURNEY: TRANSFORM



## Transform 1:

- HR engagement
  - Understanding elements of embracing employees
  - Building trust
  - Intrinsic motivation
  - Promoting collaboration
- Commitment to agile across the company

Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017





## 8. THE AGILE JOURNEY: TRANSFORM



### Transform 2:

- Leadership education
  - Dependency focus
  - Success measures or establishing of an enterprise dashboard
    - Measures for the customer satisfaction, driving with CoD, tracking end-to-end lead times, and customer revenue
    - Employee satisfaction
- ⇒ Education for executives and managers should focus on understanding their role in an Agile enterprise, how to support the use of an enterprise idea pipeline, and how to engage with their teams using the language of customer value

Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



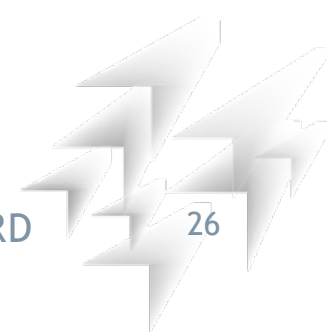
## 8. THE AGILE JOURNEY: TRANSFORM



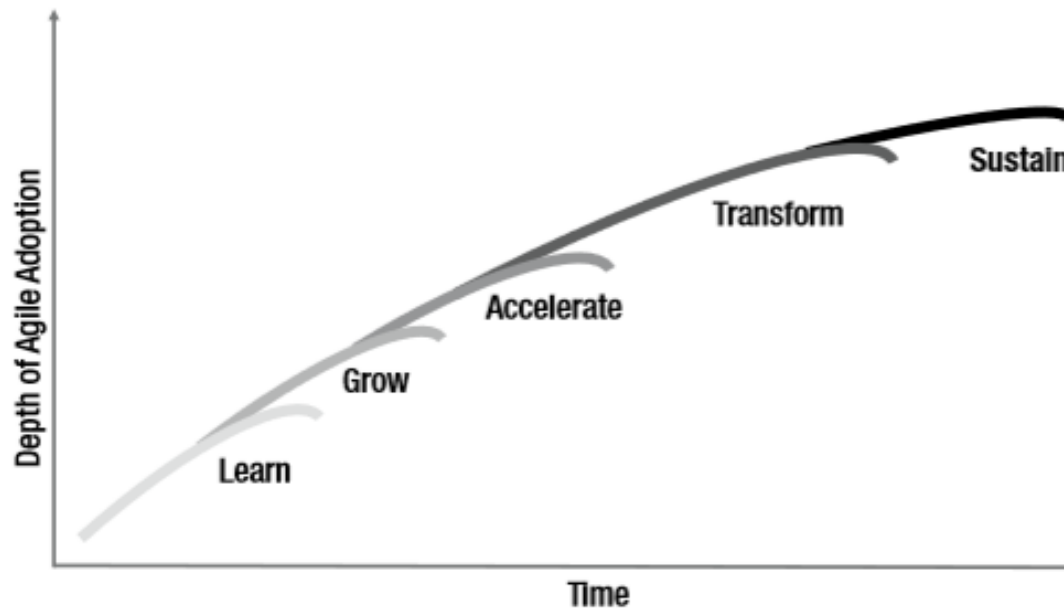
### Transform 3:

- Scaling education
- Assessment of state of agile
  - Using the agile assessment survey to gauge the current level of the agile mindset in the enterprise
- Influence outside organisations to align with agile

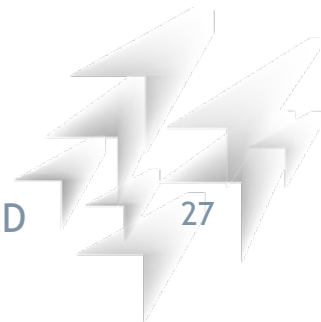
Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



# 8. THE AGILE JOURNEY: SUSTAIN



Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017

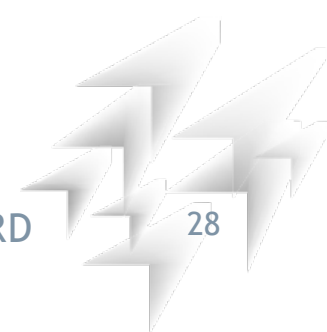


## 8. THE AGILE JOURNEY: SUSTAIN



- This step lasts indefinitely with peaks and troughs of effort depending on the shifting needs of the enterprise and leadership changes
- The focus on agile concepts, practices and mindset remains in place
- Periodic assessment
- Continued coaching
- Continued education
- Introducing practices

Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



# 9. CUSTOMER CENTRICITY



## Escaping the First Law of Organizational Gravity:

- This leads to a huge hurdle if a company seeks for customer centricity because:
    - Leaders get insulated from interaction with the customers
    - No equipment to react on fast and accelerating changes in customers needs and goals
- ⇒ Even if agile practices get implemented successfully it is no real agility because the distance between leaders and customers is too far

Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 40



# 9. CUSTOMER CENTRICITY



## Escaping the First Law of Organizational Gravity:

### How can this problem get solved?

- Introduce a formally shared responsibility for customer support over functions and levels
- It is the job of everyone to know the customer

### What are the benefits?

- Improved ability to deliver valuable products and features
- Spend less time for speculations because of talking directly to the customer
- No misses of ship dates and deadlines
- No meetings required to talk about customers

Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 40-41



# 9. CUSTOMER CENTRICITY



## The speed-factor:

Often organizations think that Agile means to increase the speed of execution ⚡

### Wrong question:

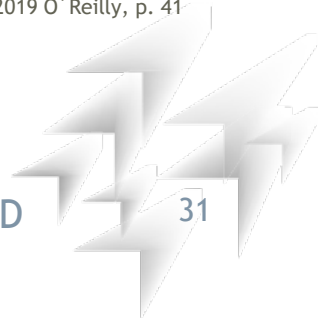
„How quickly are we doing as much work as possible?”

### Right question:

„How quickly are we able to deliver value to our customers?”

⇒ Speed is measured from the customer point of view

Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 41



# 9. CUSTOMER CENTRICITY



**Working software over comprehensive documentation:** (Part of the Agile Manifesto)

⇒ focus on the things that deliver immediate value to the customers

⇒ Receive immediate feedback whether the needs and goals are fulfilled or not

Type of deliverable	Working software	Comprehensive documentation
Software product	Minimum viable product/ functional prototype	Product specifications or documetation
Marketing campaign	Social media message tests	Yearly marketing plan
Book	Sample chapter	Proposal
Cake	Test bake	Recipe

Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 43-44





## 9. CUSTOMER CENTRICITY



Signals, which show that you are on the right track:

1. Customers are surprising you
2. Organizational and team leaders are asking customer-centric questions in meetings
3. You are incorporating customer feedback into every step of your process, from initial idea through execution

Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 52-54



## 9. CUSTOMER CENTRICITY



Signals, which show that you are not on the right track:

1. Direct interaction with customers is seen as low-status drudgery or is outsourced
2. New products or services are framed as „innovations“ or „disruptions“
3. The only customer feedback that travels through the organization is positive customer feedback
4. The progress of your agile journey is measured only by operational metrics like adoption or velocity

Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 54-55



# 10. EMPLOYEES



Main statement:

Individuals and interactions over processes and tools!

- Employees are the driving force of the company
- Unsatisfied employees will not solve problems effectively  
⇒ success of the company ↓
- Values if employees matter = COMETS

Source: Mario E. Moreira: The Agile Enterprise, 2017 Apress, p. 63



# 10. EMPLOYEES (COMETS)

**C** ollaboration

**O** wnership

**M** otivation

**E** mpowerment, **E** nthusiasm

**T** rust

**S** afety



Source: Mario E. Moreira: The Agile Enterprise, 2017 Apress, p. 65



# 10. EMPLOYEES

## Collaboration:

- Will be explained in chapter eleven

## Ownership:

- They have the authority and the resources to work effectively
- Clear definition of the authority area
- Lead to employees which:
  - ⇒ are pride
  - ⇒ are engaged
  - ⇒ bring more quality to their work

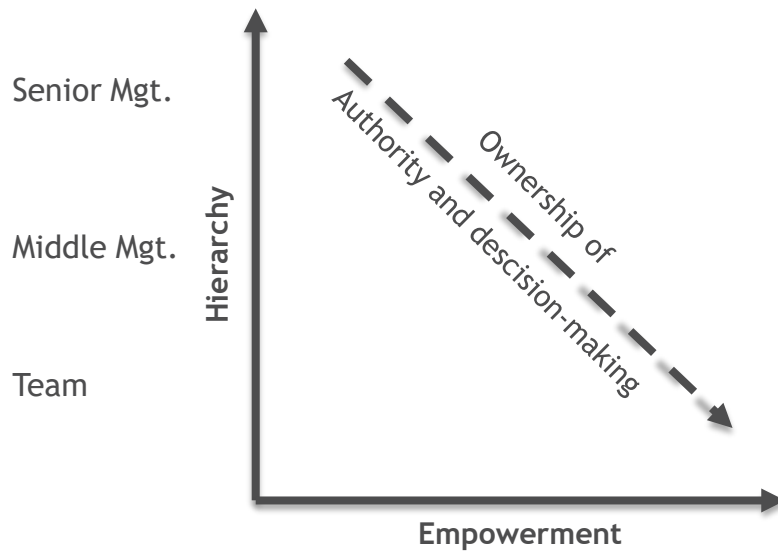
Source: Mario E. Moreira: The Agile Enterprise, 2017 Apress, p. 68



# 10. EMPLOYEES

## Ownership:

- Shift of decision making to the lowest possible level



Source: Mario E. Moreira: The Agile Enterprise, 2017 Apress, p. 68-69



# 10. EMPLOYEES

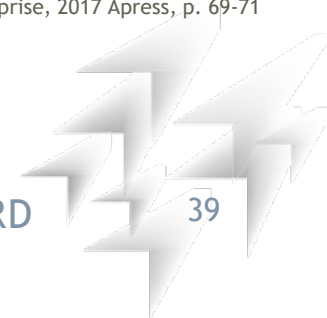
## Motivation:

- Key factor for success



Extrinsic Motivation	Intrinsic Motivation
<ul style="list-style-type: none"><li>• Caused by external factors</li><li>• e.g. money, grades, recognition, celebrity</li><li>• Only relevant for a short period of time</li></ul>	<ul style="list-style-type: none"><li>• Comes from the inside of an employee</li><li>• e.g. interest, enjoyment, pride</li><li>• Lead to more creativity, innovative products, high quality of products</li></ul>

Source: Mario E. Moreira: The Agile Enterprise, 2017 Apress, p. 69-71

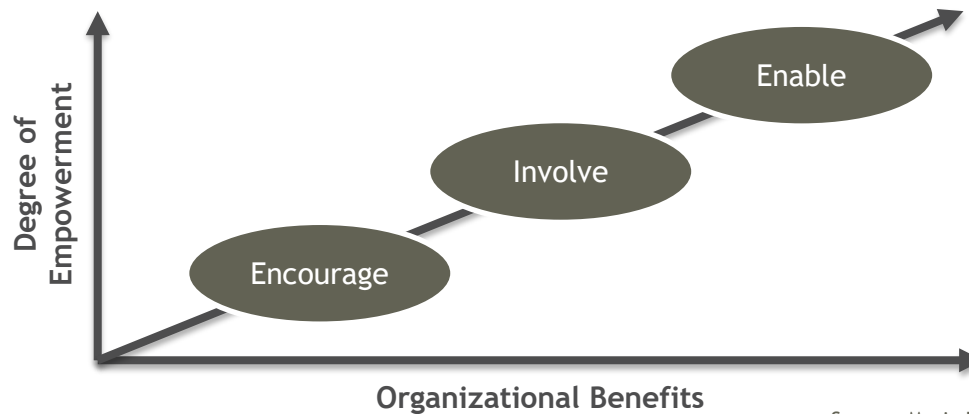


# 10. EMPLOYEES



## Empowerment:

- Should be a core value and no trend
- Employees are able to organize and change the way of working and working environment
- Team members are allowed to develop the product according to own ideas



Source: Mario E. Moreira: The Agile Enterprise, 2017 Apress, p. 71-72





# 10. EMPLOYEES



## Trust:

“Build projects around motivated individuals. Give them the environment and support they need and trust them to get the job done.”

- To give trust instead of earn trust increases the productivity
- Team members
  - ⇒ can rely to each other that the work gets done.
  - ⇒ ask for help if necessary.
- Faults are human and have to be accepted
- Trust is the heart of healthy relationships, teams and organizations

Source: Mario E. Moreira: The Agile Enterprise, 2017 Apress, p. 72-74



# 10. EMPLOYEES



## Safety:

- Create an environment where ideas are shared, options are discussed and methodical risks are taken

### Physical safety:

- No physical hazards
- Standard workplace after government regulations

### Psychological safety:

- Core for enterprise effectiveness
- Team members:
  - ⇒ take interpersonal risks
  - ⇒ are vulnerable in front of each other

High-performing team

Source: Mario E. Moreira: The Agile Enterprise, 2017 Apress, p. 74-75



# 10. EMPLOYEES



## Results of COMETS:

- Engaged employees
- Empowered to make decisions
- Motivate themselves
- Motivate each other
- Willing to contribute innovative ideas
- Willing to go the extra mile
- More passion for their work

Source: Mario E. Moreira: The Agile Enterprise, 2017 Apress, p. 63



# 11. THE IMPORTANCE OF COLLABORATION



## Basic goal:

- Small & cross-functional teams which collaborate

## What is often the case by introducing collaboration:

- Dotted lines get added to the organigram
- Creation of an open-office plan
- No thoughts about:
  - Why is cross functional collaboration important for the company and the customers?
  - What impeded in the past?

Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 57



# 11. THE IMPORTANCE OF COLLABORATION



## Further problems:

- Building a team and having meetings doesn't guarantee collaboration

## Necessary parameters:

- Openness
- Vulnerability
- Willingness to share ownership over ideas

Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 57-58



# 11. THE IMPORTANCE OF COLLABORATION



Collaborate early and often (**Second guiding principle!**)

Upfront strategic conversations



Downstream tactical discussions



Creating process



Delivering process

Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 58



# 11. THE IMPORTANCE OF COLLABORATION



## Benefits:

- Discover new and unseen solutions
- Ensure that strategy and tactics remain as planned
- Adjust the course if necessary

## Additional hints:

- It might be helpful for organizations to define what collaboration means in detail
- It is necessary to find the frame which is well suited for the respective goals and needs of the organization

Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 58



# 11. THE IMPORTANCE OF COLLABORATION



## Escaping the Second Law of Organizational Gravity:

„Individuals in an organization will prioritize the work that they can complete most easily within the comfort of their own team or silo.”

### Exemplary situation:

- The employee has a task received from the boss which should be finished at a certain time
- Input from another teams would increase the quality of the task, but they have their own tasks to do and much more significant, they may undermine the work or want credits for the work

⇒ Simple reason people react like this:

⇒ **Minimizing the risk**

Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 58-59





# 11. THE IMPORTANCE OF COLLABORATION



## Escaping the Second Law of Organizational Gravity:

### Solution: (In theory)

- Empowered
- autonomous and
- crossfunctional teams with everybody which is necessary for every task.

### Solution: (In practice)

- Create a culture of collaboration across teams

Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 59-60



# 11. THE IMPORTANCE OF COLLABORATION



## Moving from a Report and Critique Culture to a Collaborative Culture

- Some organizations think that working in a team means less time and less efficiency
- In addition even if they've introduced agile practices they can only imagine having more meetings when thinking on collaboration
  - ⇒ shift from report and critique culture to collaborative culture necessary

### Report and critique culture:

- Teams work on tasks and tell other teams in meetings about the completed task
- Contributions of other teams are seen and felt as critique, because of the already finished task

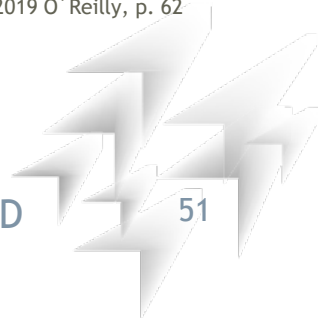
Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 60-61



# 11. THE IMPORTANCE OF COLLABORATION

Report and critique culture	Collaborative agile culture
Meetings are a chance to present work that has already been completed	Meetings are a chance to share ideas and make decisions about works in progress
Interaction with people from other teams or functions is inefficient and to be avoided unless there is an immediate tactical dependency to be resolved	Interaction with people from other teams or functions is seen as a way to get out ahead of potential future dependencies and conflicts
Each team has distinct and at times conflicting goals	The goals of the teams are aligned under overall company and customer goals

Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 62



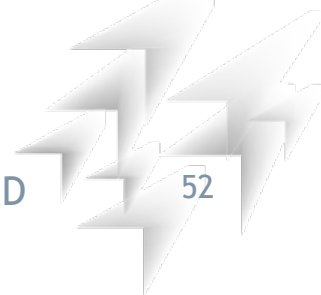
# 11. THE IMPORTANCE OF COLLABORATION



## Signals, which show that you are on the right track:

1. People from different teams and functions spend time together outside of formally scheduled, transactional meetings
2. Collaboration is taking place around upstream strategy as well as downstream tactics
3. Nobody can really remember whose idea that was in the first place
4. Anybody on your team can take a sick day without work grinding to a halt

Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 72-74



# 11. THE IMPORTANCE OF COLLABORATION



Signals, which show that you are not on the right track:

1. Your meetings fell like elementary school book reports
2. Everything shared between teams is finished and polished
3. Your inbox is full of requests for asynchronous feedback

Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 74-76



# 12. HANDLING UNCERTAINTIES



## Escaping the Third Law of Organizational Gravity:

### Complete solution:

- ⇒ Senior leaders need to understand that room for changes is an inextricable part of a project
  - ⇒ Adjusting the course should be seen a foresight and not like a regrettable instance of failure

### Example:

- ⇒ Replace years-long planning cycles and introduce shorter planning cycles of for example a quarterly cycles
- or
- ⇒ Add review dates to years-long planning to reflect the last quarter year

Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 80



# 12. HANDLING UNCERTAINTIES



## Escaping the Third Law of Organizational Gravity:

### Benefits:

- Recognize
  - ⇒ New initiatives from company leaders
  - ⇒ Market or regulatory changes
  - ⇒ New information about the customers
  - ⇒ What was done and what wasn't done?
- Look ahead and meet adjustments if necessary

Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 80



## 12. HANDLING UNCERTAINTIES



### Agile is uncertain too!

Some organizations think, if they implement agile practices in a fast-changing world, that these practices work forever and never need to be changed.

⇒ It is also necessary to plan for uncertainties in the agile approach

### What is often thought:

„The project will be great, because we are doing agile.”

### How it can be solved:

- Introduce a shared ownership over processes
- Establish a culture of trust and transparency the speak freely about things which are not working and why

Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 85-86





# 12. HANDLING UNCERTAINTIES



**Signals, which show that you are on the right track:**

1. You and your team feel a little bit uncertain and out of your depth most of the time
2. You are regularly killing off projects that are not creating value for your customers
3. When specific agile practices are not working for your team, you work together to change them

Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 72-74



# 12. HANDLING UNCERTAINTIES



Signals, which show that you are not on the right track:

1. Your organization demands 100 % certainty before committing to a decision
2. You are withholding important information until the next yearly planning or budgeting meeting
3. You are working a certain way „because it´s agile“- and that´s it

Source: Matt LeMay: Agile for everybody, 2019 O´Reilly, p. 74-76





# 13. AGILE METHODS

## Scrum (most widely practiced agile method)

Characteristics:

- Development method
- Organized in sprints with a constant duration (iterations)
  - ⇒ Achieve early and regular results
- Consists out of three roles (Product Owner, Scrum Master, Development Team)
- Runs in four phases
  1. Sprint Planning =>
  2. Daily Scrum =>
  3. Sprint Review =>
  4. Sprint Retrospective

Source: <https://www.wibas.com/de/scrum/>, retrieved on 30.08.2019



# 13. AGILE METHODS



## Scrum

### Roles:

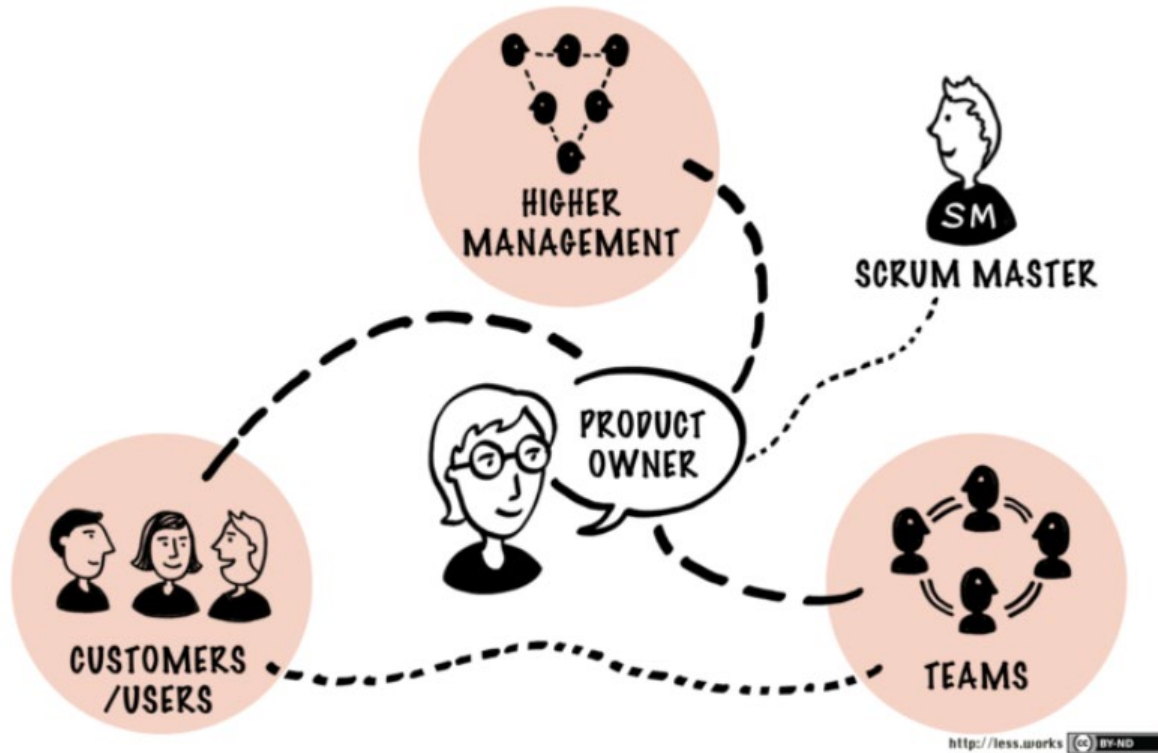
- Product Owner
  - ⇒ Is executed by only one person
  - ⇒ Responsible for the success of the product
  - ⇒ Has the authority to decide what will be developed
  - ⇒ Responsible for the requirements and their prioritisation
    - ⇒ Is called Product Backlog
  - ⇒ Checks the requirements at the end of each sprint
  - ⇒ Communicates with four groups of people (see next slide)

Source: <https://www.wibas.com/de/scrum/>, retrieved on 30.08.2019

Source: <https://agile.coach/2018/product-owner-scrum-im-detail/>, retrieved on 30.08.2019



# 13. AGILE METHODS



Source: <https://agile.coach/2018/product-owner-scrum-im-detail/>, retrieved on 30.08.2019



# 13. AGILE METHODS



- Scrum Master
  - ⇒ Responsible that the team works operative and productiv
  - ⇒ Protects the team from negative influences
  - ⇒ Moderates meetings if necessary
  - ⇒ Helps the product owner if methodical questions occur
  - ⇒ Helps everyone to understand scrum
- Development Team
  - ⇒ Develops the product
  - ⇒ Responsible for achieving the requirements of each sprint

Source: [https://www.it-agile.de/fileadmin/agile\\_review/individuellartikel/Was\\_MachtDerScrumMasterDenGanzenTagArtikelagilereview201501hw.pdf](https://www.it-agile.de/fileadmin/agile_review/individuellartikel/Was_MachtDerScrumMasterDenGanzenTagArtikelagilereview201501hw.pdf), retrieved on 30.08.2019

Source: <https://www.wibas.com/de/scrums/>, retrieved on 30.08.2019



# 13. AGILE METHODS



## Sprints (time boxed iterations)

### Characteristics:

- At the beginning of a sprint:
  - Prioritized list of requirements => **Product Backlog**
  - The development team selects as many requirements as they can fulfill during one sprint
- Defined period of time (max. four weeks)
- Participation of the customer
- Receive feedback at the end of each iteration
- Integrate and adapt the feedback for the further work progress

Source: <https://www.wibas.com/de/scrum/>, retrieved on 30.08.2019

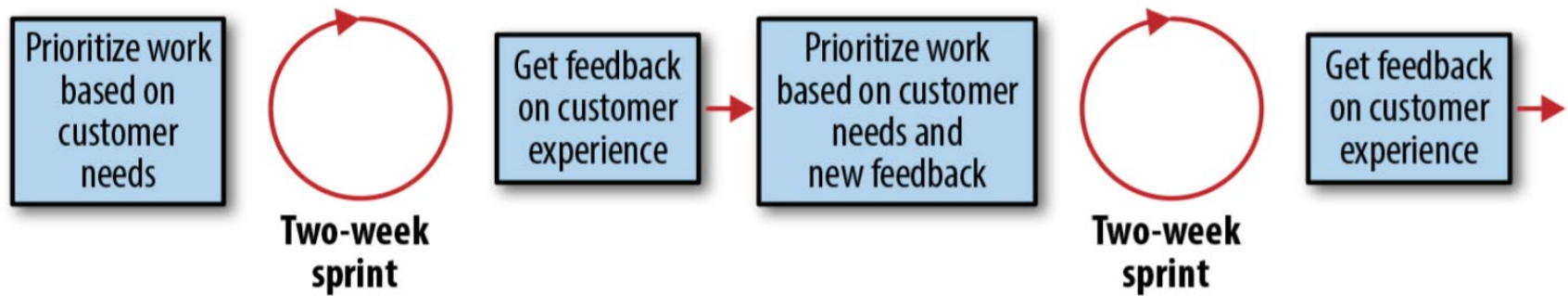
Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 47-48



# 13. AGILE METHODS



Sprints (time boxed iterations)



Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 47-48

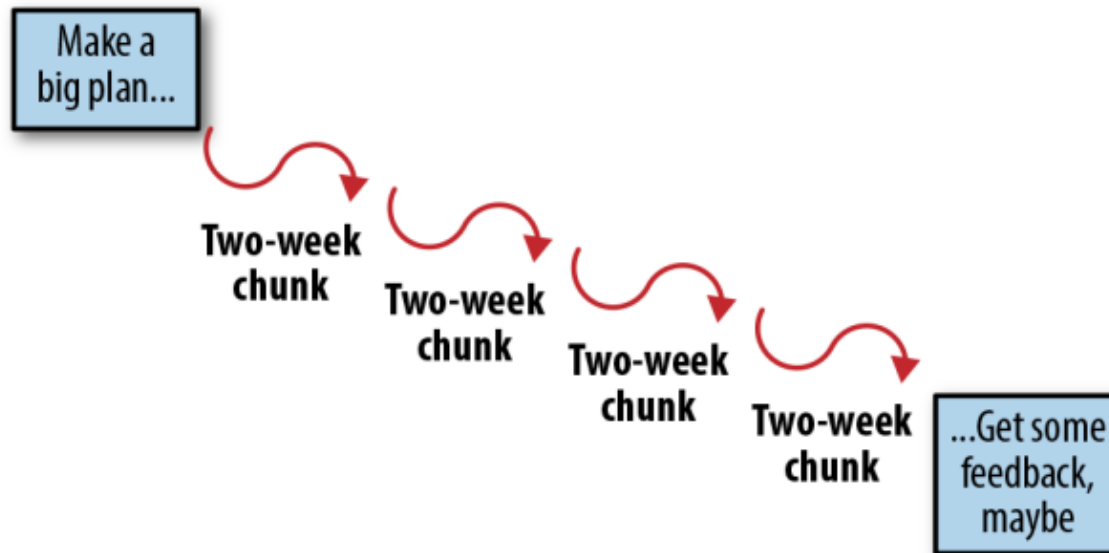




# 13. AGILE METHODS



How sprints should not be done:



Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 47



# 13. AGILE METHODS



## 1. Sprint Planning

- Time boxed (defined duration) with for example eight hours for a four-week sprint
- Scrum Master:
  - leads the Sprint Planning
- Product Owner:
  - names the sprint goal and prioritises the requirements in the Product Backlog
- Development Team:
  - decides how many requirements they can work on

Source: <https://www.projektmagazin.de/glossarterm/sprint-planning>, retrieved on 31.08.2019



# 13. AGILE METHODS



## 1. Sprint Planning

Result:

- Sprint Backlog which includes:
  - > Plan for the sprint
  - > Chosen requirements of the development team
  - > Information which are necessary to achieve the sprint goal
    - ⇒ Is regularly updated by the development team during the sprint

Source: <https://www.projektmagazin.de/glossarterm/sprint-backlog>, retrieved on 31.08.2019

Source: <https://www.projektmagazin.de/glossarterm/sprint-planning>, retrieved on 31.08.2019



# 13. AGILE METHODS



## 2. Daily stand up/ Daily scrum

Rules:

- Every day-meeting
- Time boxed max. 15 minutes
- No one is sitting during the meeting
- Every team member answers three questions:
  - ⇒ What did I do yesterday that helped the team meet its goals?
  - ⇒ What will I do today to help the team meet its goals?
  - ⇒ Do I see any impediments that prevent me or the team from meeting our goals?
- Short version: What did you do yesterday, what will you do today, and do you have any blockers?

Source: Matt LeMay: Agile for everybody, 2019 O'Reilly, p. 69-70



# 13. AGILE METHODS



## 3. Sprint Review

- Time boxed with for example eight hours for a four-week sprint
- Scrum Master:
  - Organizes and leads the sprint review
- Product Owner:
  - Confirms wheter the defintion of done is fulfilled
- Development Team:
  - Reports about the sprint and what they´ve achieved

Source: <https://www.projektmagazin.de/glossarterm/sprint-review>, retrieved on 31.08.2019



# 13. AGILE METHODS



## 3. Sprint Review

- At the end:
  - Product Owner
    - > Updates th Product Backlog (delete, prioritize and define new requirements)
  - All participants
    - > Think about the next tasks which should be done
    - > Prepare the next sprint planning under consideration of:
      - ⇒ Market development
      - ⇒ Budget
      - ⇒ Schedule

Source: <https://www.projektmagazin.de/glossarterm/sprint-review>, retrieved on 31.08.2019



# 13. AGILE METHODS



## 4. Sprint Retrospective

- Time boxed with for example three hours for a four-week sprint
- Takes place after the Sprint Review and before the Sprint Planning
- Scrum Master:
  - Organizes and leads the sprint retrospective
- Guiding questions:
  - What positive and negative experiences have we had in the past sprint?
  - What would we like to improve?
  - How can we implement these improvements?

Source: <https://www.projektmagazin.de/glossarterm/sprint-retrospektive>, retrieved on 31.08.2019



# 13. AGILE METHODS



## Benefits:

- The most important requirements get done first which leads to usefull result in the early phase of a project
  - ⇒ In addition „finishing something“ and product quality will be a routine instead of a drama
- Regulary results reduce the risk to fail
- Feedback of the customer eliminates waste
  - ⇒ It is known what needs to be done and what needs to be corrected

Source: <https://www.wibas.com/de/scrum/>, retrieved on 30.08.2019





# 13. AGILE METHODS



## Lean Canvas:

- The Lean Canvas is an actionable and entrepreneurial business plan adapted to focus on immediate problems and opportunities
- It provides meaningful, yet concise information suited for an Agile culture
- It is a one-page, straightforward way to map business elements to a problem

<b>PROBLEM</b>	<b>SOLUTION</b>	<b>UNIQUE VALUE PROPOSITION</b>	<b>UNFAIR ADVANTAGE</b>	<b>CUSTOMER SEGMENTS</b>
<b>Existing Alternatives</b>	<b>KEY METRICS</b>	<b>High-Level Concept</b>	<b>CHANNELS</b>	<b>Early Adopters</b>
<b>COST STRUCTURE</b>		<b>REVENUE STREAMS</b>		

Lean Canvas

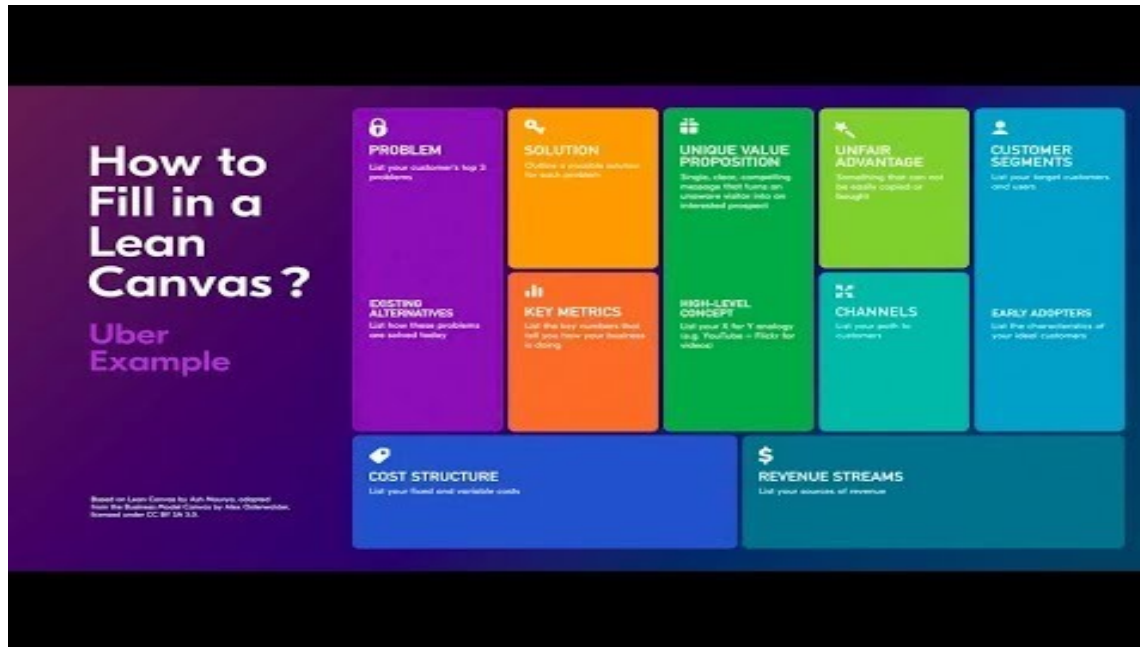
Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



# 13. AGILE METHODS



Lean Canvas:



Source: <https://www.youtube.com/watch?v=pvIN9STpzCQ>, retrieved on 02.09.2019



# 13. AGILE METHODS



## Story Mapping

### Definition

“*Story mapping points you at options that help validate customer value.*” (JP Beaudry)

- A story map is a visual representation of the user journey which an enterprise seeks to bring to life, it is used to develop a minimal viable product (MVP)
- Instead of attempting to build the full idea it is better to build only a portion of it to gain customer feedback
- Big ideas should be decomposed and executed in smaller increments
- Benefits of bringing an idea to market incrementally:
  - user story mapping provides overview, clarity and consensus
  - To better understand the market needs
  - Reduction of technical changes
  - every stage of development can be tested

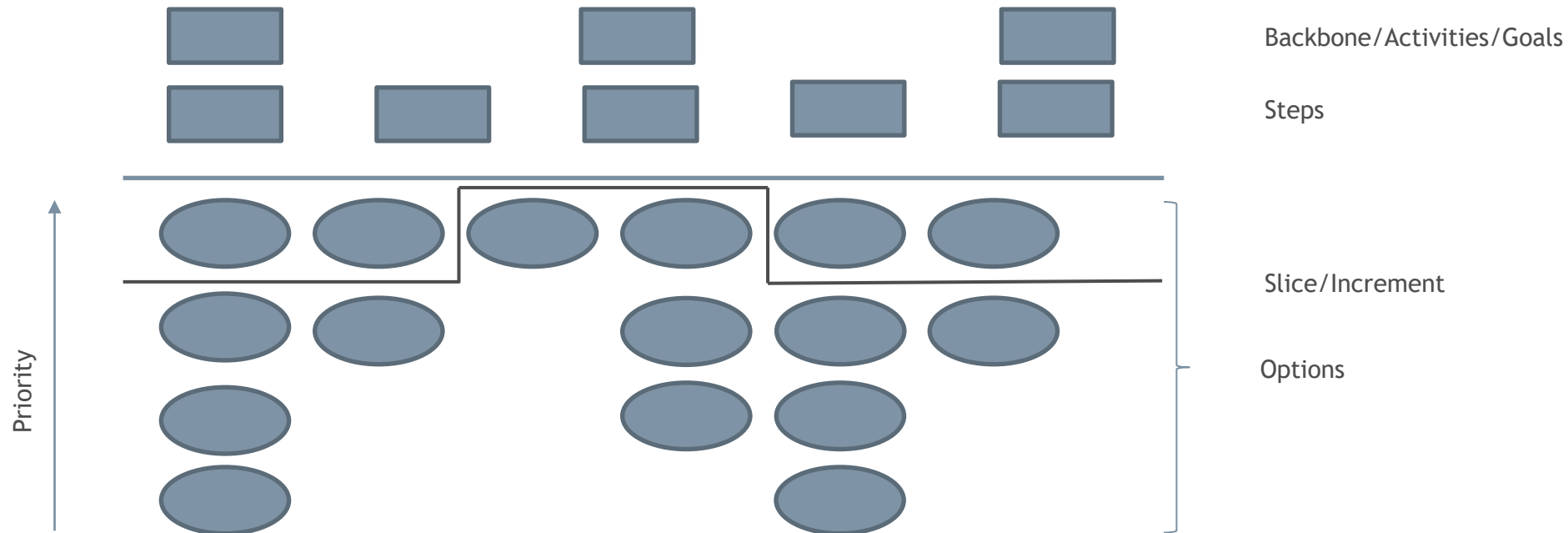
Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



# 13. AGILE METHODS



## Story Mapping Approach



Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017





## 13. AGILE METHODS

### Story Mapping:

#### Approach:

1. Determine the User Experience Backbone (Activities and Goals)
2. Determine the steps
3. Identify the options
4. Prioritize the options
5. Cut the increment

Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



# 13. AGILE METHODS



## Six Prism technique:

### Definition

- The six-prism technique allows to consider different ways to carve the increment of a story map considering value, geography, risk, stakeholder, urgency and necessity

### Value

- Asks which piece do customer value most

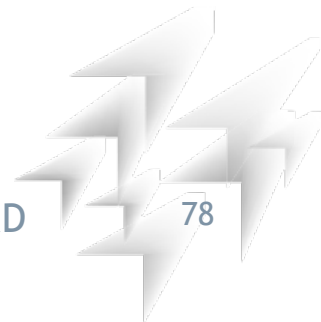
### Geography

- Asks if the product could be launched in just one of the many intended markets

### Risk

- Ask what the biggest risk to this project or its killer assumption is

Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



# 13. AGILE METHODS



## Six Prism technique:

### Stakeholder

- Identify important stakeholders, whose opinion may have a disproportionate impact on your ability to deliver.
- This could be a customer in a form of a persona

### Urgency

- Confrontation of important external deadlines

### Necessity

- Consider the bare minimum to get away with
- Without this you are not in business at all

Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



# 14. CONTINUOUS LEARNING

## Coaching

- Helps a team to put knowledge of process and roles into action
- Lays the groundwork for transforming the culture
- Coaching provides a two-way communication process, questions can be asked along the way
- A coach is necessary to apply a process correctly with the right behaviours for the expected culture



Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017





# 14. CONTINUOUS LEARNING

## Mentoring

- Focuses on relationships and building confidence and self-perception
- Provides a two-way communication process, deep learning can occur because the mentee is asking questions and seeking answers without being prompted
- Allows individuals to better understand their role in the culture



Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



# 14. CONTINUOUS LEARNING

## Experiencing

- Focuses on living in the new process, applying the skills and experiencing new skills
- Provides first-hand knowledge of what they have learned
- Allows to understand the need of behaviour changes better
- Allows deeper questions, further exploration and experimentation



Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



# 14. CONTINUOUS LEARNING

## Experimenting

- Trying something new for a short period of time in order to test a proposed change
- Experimenting is a way to try concepts and practices before fully committing to a change.



Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



# 14. CONTINUOUS LEARNING

## Reflecting

- Focuses on taking the time to consider what you have learned
  - Skill
  - Process
  - Role
  - Culture
- Determine what you can do better and what else is needed on the learning journey



Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



# 14. CONTINUOUS LEARNING

## Giving back

- Occurs when employees gained enough knowledge, skills and experience to start helping others
- This provides a feeling of ownership in a transformation of the culture



Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



# 15. THINKING APPROACHES

## Types:

- Incremental Thinking
- Experimental Thinking
- Divergent and Convergent Thinking
- Feedback Thinking
- Design Thinking



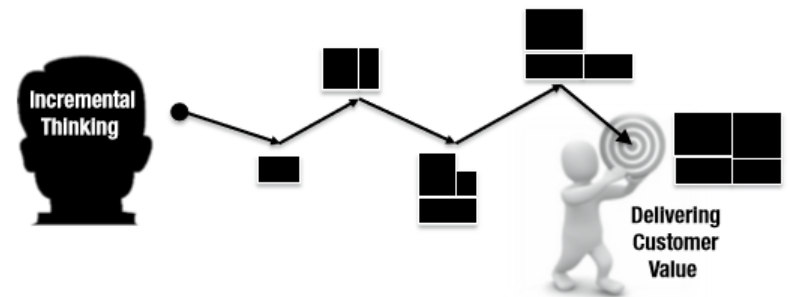
Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



# 15. THINKING APPROACHES

## Incremental Thinking

- Approach to thinking in small pieces and in short time frames
- supports the concept of learning iteratively what the customer finds as valuable
  - by building increments of product that the customer can inspect and provide feedback for

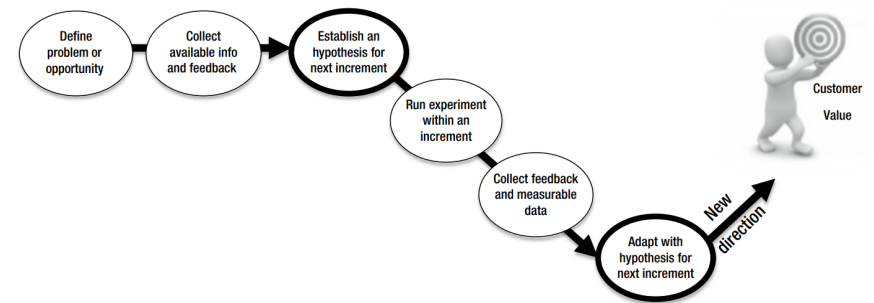


Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



## Experimental Thinking

- Approach to embrace a more systematic way of navigating toward certainty
- Instead of guessing, it is used a scientific approach to hypothesize the next move toward customer value
  - Establishing a hypothesis
  - Running an experiment (apply measurable data and feedback loops)
  - Determine if it is valid or not



Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017

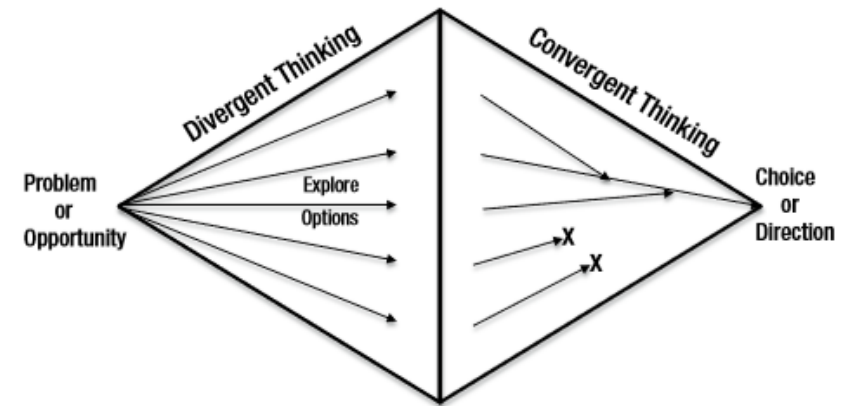




# 15. THINKING APPROACHES

## Divergent and Convergent Thinking

- Divergent thinking
  - Approach that promotes collaboration to generate ideas and solutions without censoring of ideas (Technique: e.g. Brainstorming)
- Convergent Thinking
  - Approach to systematically limit the options and focus on one direction (Technique: e.g. red-dot voting)



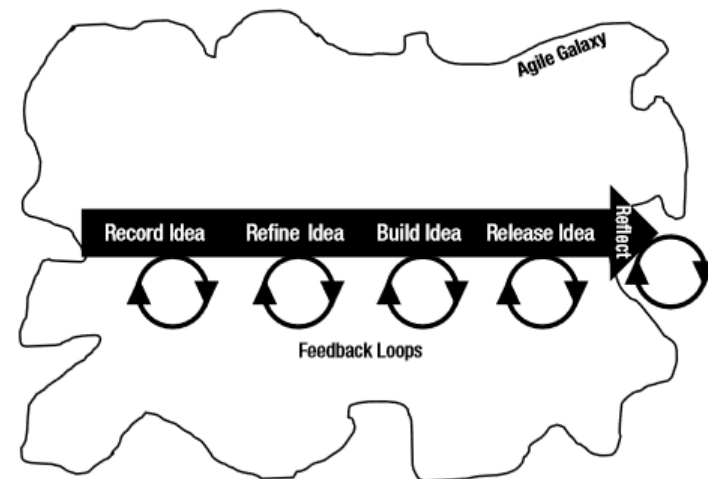
Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



# 15. THINKING APPROACHES

## Feedback Thinking

- Belief to embrace feedback, realizing how it provides the information which guides the company toward what is valuable
- Key to feedback thinking is not just capturing customer feedback but using it to adapt toward customer value.



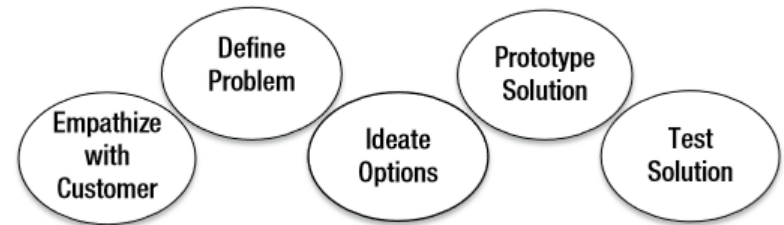
Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



# 15. THINKING APPROACHES

## Design Thinking

- Approach where teams have the space to consider the best options for solving a problem
1. Empathize with customer
  2. Define Problem
  3. Ideate Options
  4. Prototype Solution
  5. Test Solution



Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



## 16. IDEA PIPELINE: 5R MODEL

5 x R

### 1. Record:

- What is known about the new idea?
- Importance of visibility and transparency to everyone in the company

### 2. Reveal:

- Focuses on two areas
  - First area is where the idea gets revealed in the pool of ideas, according to its value level
  - In the second area it is determined if the idea has enough value

Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



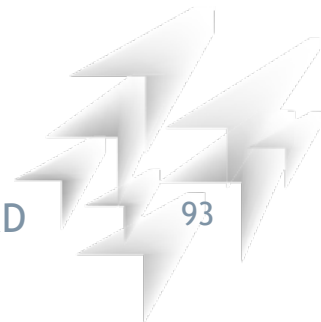
# 16. IDEA PIPELINE: 5R MODEL

## 5 x R

### 3. Refine:

- Intention: Moving away from big upfront requirements and instead focus on a slice of ideas in a collaborative and evolving manner
- Cutting increments of work via story mapping or use cases can help determine the value of an idea prior to the whole idea being built

Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



## 16. IDEA PIPELINE: 5R MODEL

5 x R

### 4. Realize:

- This stage is the art and practice of building the idea into a working product
- Product Owner
  - prioritizes the work in the backlog,
  - shares business context with the team, and
  - incorporates customer feedback to better align with customer value.

### 5. Release:

- This stage contains activities that converts the in-house built idea and launches it into public
- The goal of Agile is that by the end of an iteration, it should include activities to make the idea potentially shippable

Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



# 17. PRIORORIZATION OF IDEAS



## Problem:

- Organizations have many good ideas, but trying them all out is not possible

## Solution:

- In order to deliver the most customer value in the shortest possible time prioritization is necessary, you can distinguish between:
  - Qualitative Methods
    - MoSCoW
    - HiPPo
  - Quantitative Methods / Costs of Delay

Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



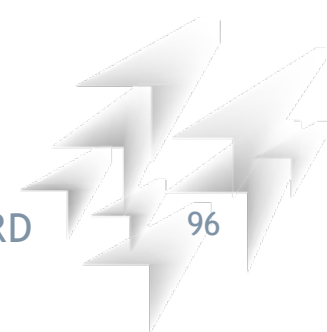
# 17. PRIORIZATION OF IDEAS



## Qualitative Methods:

- MoSCoW
  - **M** - Must (absolutely necessary)
  - **S** - Should (should be implemented if all **MUST** requirements can still be met)
  - **C** - Could (can be implemented if compliance with higher-value requirements is not impaired)
  - **W** - Won't (will not be implemented this time, but will be reserved for the future)
- Defines the smallest possible solution that could possibly work
- Approach which places a level of importance on each requirement
- This approach explains the decisions that have been made and allows the team to focus on the must have

Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017





# 17. PRIORIZATION OF IDEAS



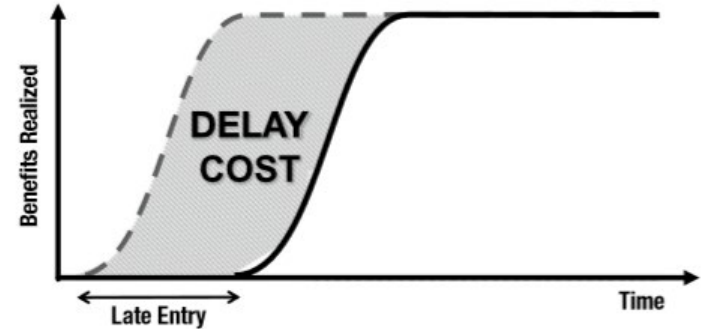
## Qualitative Methods:

- HiPPO:
    - Is an acronym for “highest paid person’s opinion”
    - Product owner is seen as an expert with the best understanding of the overall situation and therefore in the best position to make key decisions
- ⇒ Old fashioned

Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



# 17. PRIORORIZATION OF IDEAS



## Quantitative Methods / Costs of delay:

- CoD is the net change in forecasted gross margin per week
- CoD is an economic method that allows companies to prioritize those ideas that will create the highest customer value by putting a price tag on time

$$\text{CoD} = \frac{\text{Contributors to Profitability including Increase Revenue} + \text{Protect Revenue} + \text{Decrease Costs} + \text{Avoid Costs}}{52}$$

- CoD is typically stated per week to support the granularity of the impact of priority trade-offs → divided by 52

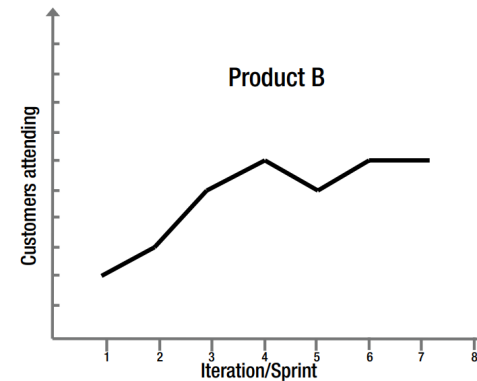
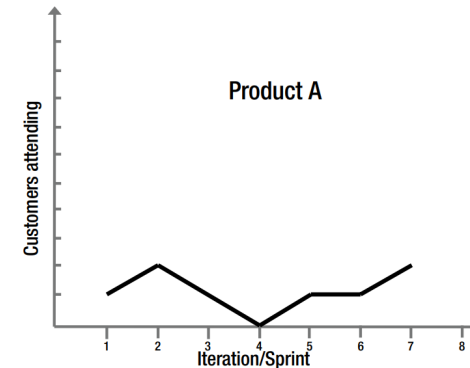
Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



# 18. MEASURING SUCCESS

## Customer at Demos

- Early indicator value measure
- Looks at the number of customers attending demos for a team or product
- Without getting much customer involvement in the demos (Product A), it is necessary to be moving in the direction of customer value.



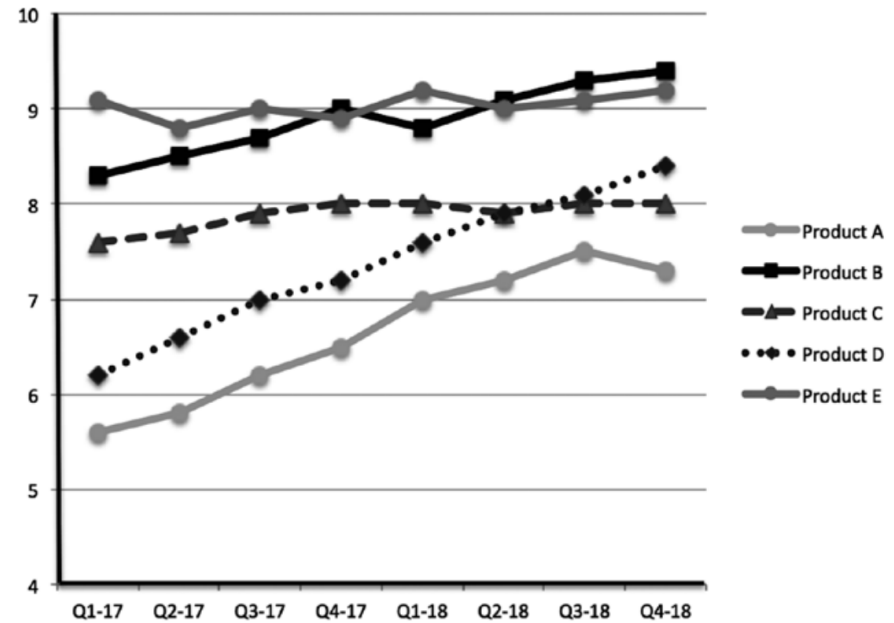
Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



# 18. MEASURING SUCCESS

## Customer Satisfaction

- Way to gauge if a company's products and services meet or surpass customer expectations
  - It may be measured along various dimensions:
    - usefulness of a product and
    - responsiveness to problems
  - The net promoter score (NPS) is an index that measures the willingness of customers to recommend a company's products or services to others
- ⇒ customer satisfaction surveys should be conducted periodically to measure satisfaction of the company's products and identify actions for improvement



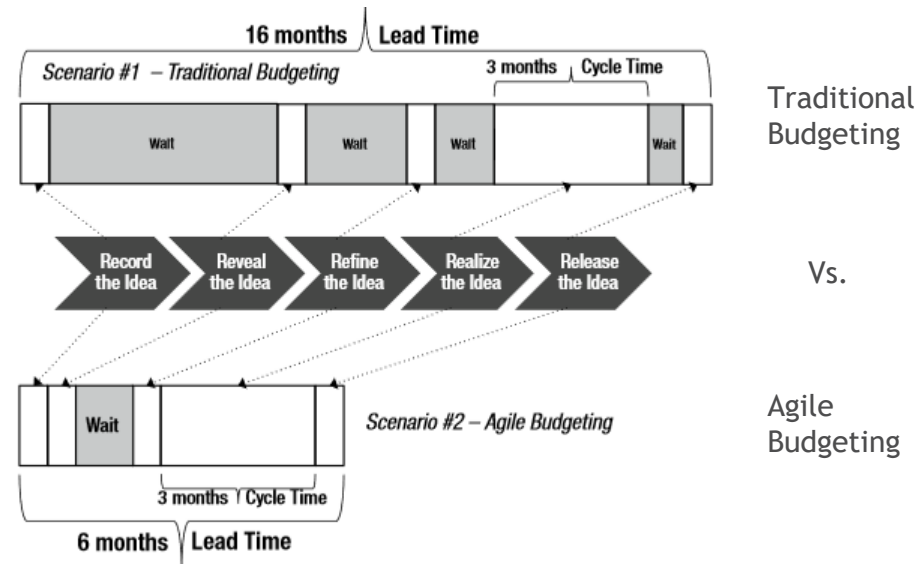
Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



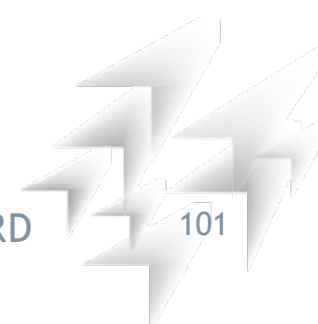
# 18. MEASURING SUCCESS

## End-to-End-Lead Time

- Lead time is the elapsed time from when the idea is recorded until it is delivered.
- It highlights that there is a lot more elapse time spent in the Record to Refine stages than in the Realize stage
- If ideas are taking a long time to get to market, this can have a direct impact on customer revenue.



In the Agile budgeting scenario, a special focus is placed on reducing the wait states.



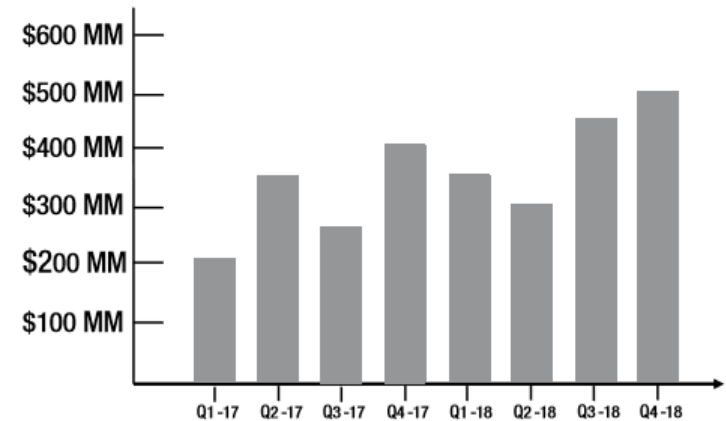
Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



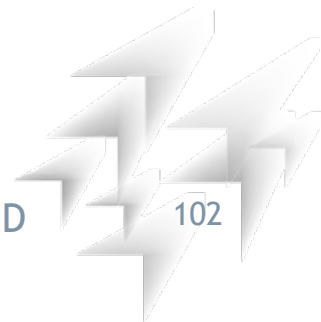
# 18. MEASURING SUCCESS

## Customer Revenue

- Net revenue is the amount of money a company receives from sales of products and services
- Key indicator of whether customers find value in the products
- Due to revenue is a lagging metric it is important to create a lagging to leading metric path in order to have leading indicators to help to gauge the path to an increase in revenue



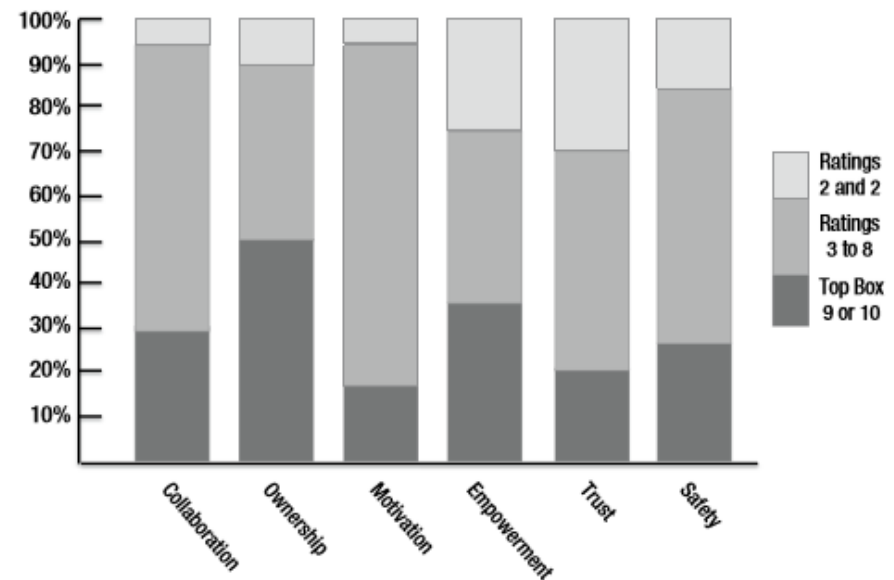
Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



# 18. MEASURING SUCCESS

## Employee Satisfaction

- Way to gauge employees' feeling of contentment
- Employee feedback allows you to engage in meaningful improvement opportunities
- Poor satisfaction can lead to higher attrition rates and low productivity
- By giving the employees a voice, they can express their interests and concerns
- COMETS can be used to measure employee satisfaction



Source: Moreira, Mario E.: *The Agile Enterprise. Building and Running Agile Organizations*: Apress, 2017



# 19. OBJECTIVES AND KEY RESULTS (OKR)

## History of management methods



Source: Jacob, Christian; Lobacher, Patrick: *Agile Mitarbeiterführung mit OKR - Grundlagen*. Video2brain. <https://www.lynda.com/de/Leadership-Management-tutorials/Agile-Mitarbeiterfuehrung-OKR/483938-2.html?org=hs-pforzheim.de>  
Retrieved: 03.09.2019





## Taylorism

- ~ 1900
- Detailed specification of the working method
- Completely disassembly and fixed workflows
- Performance time and performance location always fixed



Von Grap - Gaugler, Eduard (Hrsg.): Taylor, Frederick Winslow : The principles of scientific management ; Vademecum zu dem Klassiker der Wissenschaftlichen Betriebsführung. Düsseldorf: Verlag Wirtschaft und Finanzen, 1996., Gemeinfrei, <https://commons.wikimedia.org/w/index.php?curid=8682965>

Source: Jacob, Christian; Lobacher, Patrick: *Agile Mitarbeiterführung mit OKR - Grundlagen*. Video2brain. <https://www.lynda.com/de/Leadership-Management-tutorials/Agile-Mitarbeiterfuehrung-OKR/483938-2.html?org=hs-pforzheim.de>  
Retrieved: 03.09.2019



## Management by Objectives

- ~ 1950
- Leadership through goals
- Largest change: Employees do not represent a resource
- Self-initiative required from employees
- Evaluation on the basis of objectives
- Significantly more objectivity
- Execution:
  - annual meeting with target agreement
  - regular target-progress meetings



Source: Jacob, Christian; Lobacher, Patrick: *Agile Mitarbeiterführung mit OKR - Grundlagen*. Video2brain. <https://www.lynda.com/de/Leadership-Management-tutorials/Agile-Mitarbeiterfuehrung-OKR/483938-2.html?org=hs-pforzheim.de>  
Retrieved: 03.09.2019



## Objective and Key Results (OKR)

- OKR is a management method in which the goals of the company are linked with the goals of teams and individual employees
- Invented by Intel co-founder Andy Grove
- The leadership model became known when John Doerr introduced OKR to Google in 1999
- It is understood as an ideal system for a clear communication of goals, progress and results
- Helps to set a clear focus for the next three months



Source: Thomas, Jan: OKR: *Wie ein großes Orchester*. Berlin Valley: <https://berlinvalley.com/okr-agile-management-methode/>. Retrieved 03.09.2019



## Objective and Key Results (OKR)

- It aligns operational objectives with management objectives
- Companies such as Amazon, Oracle, Twitter, Zynga, Adobe, Asana, Dropbox or LinkedIn define company-wide goals, align them to the company, team or employee level, introduce a document progress and make goals measurable

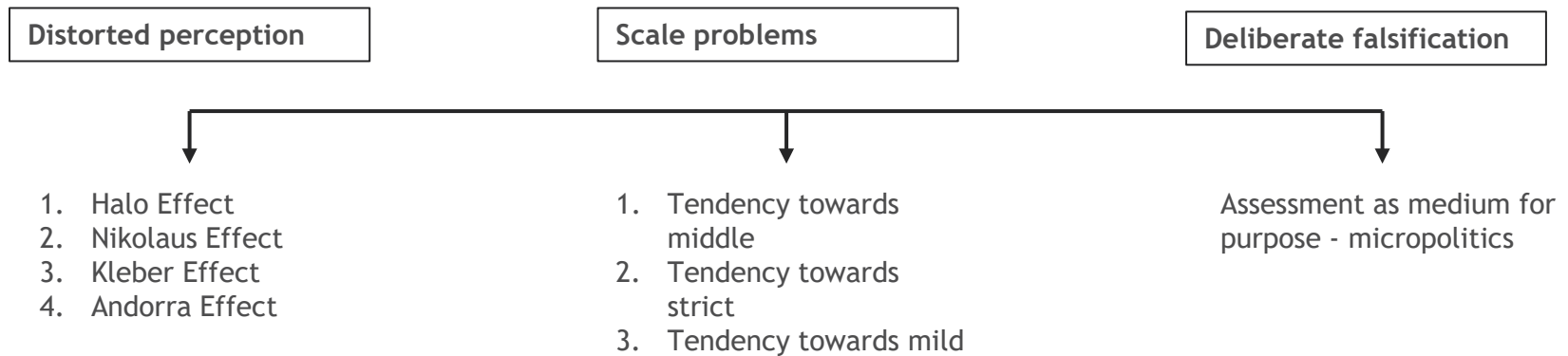


Source: Thomas, Jan: OKR: *Wie ein großes Orchester*. Berlin Valley: <https://berlinvalley.com/okr-agile-management-methode/>. Retrieved 03.09.2019



## Why do many classic models fail?

- Free assessment based on human evaluation
- Perception is not always objective
- Error of assessment



Source: Jacob, Christian; Lobacher, Patrick: *Agile Mitarbeiterführung mit OKR - Grundlagen*. Video2brain. <https://www.lynda.com/de/Leadership-Management-tutorials/Agile-Mitarbeiterführung-OKR/483938-2.html?org=hs-pforzheim.de>  
Retrieved: 03.09.2019



## Halo-Effect

- a characteristic unconsciously affects other characteristics
- it is derived from known to unconscious
- ultimately only one characteristic is evaluated

## Kleber-Effect

- unconscious underestimation

## Nikolaus-Effect

- great impact of recent events
- valuation set for short period of time

## Andorra-Effect

- employees adapt to assessment
- regardless of whether the assessment was correct



Tendency towards..

..middle, strict, mild:

- the evaluator:
  - sets to mean values
  - doesn't want to “hurt” anyone
  - sets a high level of standards

Source: Jacob, Christian; Lobacher, Patrick: *Agile Mitarbeiterführung mit OKR - Grundlagen*. Video2brain. <https://www.lynda.com/de/Leadership-Management-tutorials/Agile-Mitarbeiterfuehrung-OKR/483938-2.html?org=hs-pforzheim.de>  
Retrieved: 03.09.2019



# 19. OKR

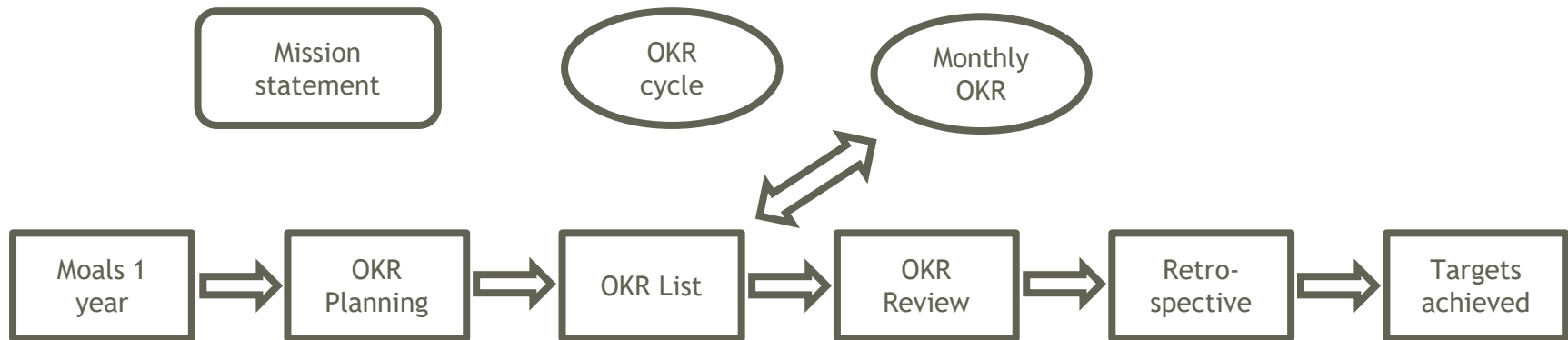
	Lean	Agile	OKR
<b>Orientation</b>	Added value for customers	Satisfaction of customer wishes	Leadership and motivation
<b>Individual vs. Teamwork</b>	Working groups	Teamwork	Teamwork
<b>Standardization vs. Flexibility</b>	Reduction of changes to simplify processes	Flexible approach for fast and cost-effective implementation of changes	Flexible approach
<b>Responsibility</b>	Employees on their own responsibility	Self-organized teams	Self-organization
<b>Feedback</b>	Feedback to improve deficits	Permanent feedback to reduce problems	Review and Retrospective
<b>Improvement</b>	Continuous improvement	Continuous focus on excellence	Retrospective
<b>Duration of the processing intervals</b>	Short intervals	Short cycles	Short cycles
<b>Complexity</b>	Reduction to value-adding processes	Reduction of complexity through small development increments	Reduction of complexity

Source: Jacob, Christian; Lobacher, Patrick: *Agile Mitarbeiterführung mit OKR - Grundlagen*. Video2brain. <https://www.lynda.com/de/Leadership-Management-tutorials/Agile-Mitarbeiterfuehrung-OKR/483938-2.html?org=hs-pforzheim.de>  
Retrieved: 03.09.2019





## Overview of the OKR process



Source: Jacob, Christian; Lobacher, Patrick: *Agile Mitarbeiterführung mit OKR - Grundlagen*. Video2brain. <https://www.lynda.com/de/Leadership-Management-tutorials/Agile-Mitarbeiterfuehrung-OKR/483938-2.html?org=hs-pforzheim.de>  
Retrieved: 03.09.2019



## Monthly OKR

- Once a month the team has a meeting and makes a status quo review of the team OKR.
- On the one hand:
  - ⇒ Is the number of key results already achieved and whether satisfactory target achievement is realistic are considered?
- On the other hand:
  - ⇒ Analysing whether there are unexpected developments that have a decisive impact on the OMC
- If the discussion at team level is over, there is a brief vote by all teams. This coordination is important to clarify possible cross-team aspects

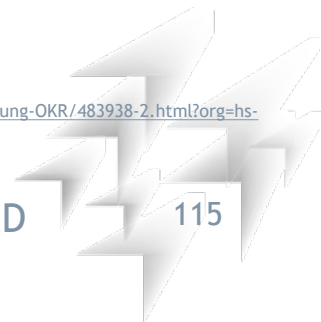
Source: Jacob, Christian; Lobacher, Patrick: *Agile Mitarbeiterführung mit OKR - Grundlagen*. Video2brain. <https://www.lynda.com/de/Leadership-Management-tutorials/Agile-Mitarbeiterfuehrung-OKR/483938-2.html?org=hs-pforzheim.de>  
Retrieved: 03.09.2019



## OKR Review

- The OKR Review also takes place on three levels:
  1. Company OKR Review
  2. Team OKR Review
  3. Employee OKR Review
- This meeting is purely an evaluation meeting
- At the end of the cycle, it is evaluated which key results have been achieved to what percentage
- The results of the OKR review are the results of the OKR of the last cycle.

Source: Jacob, Christian; Lobacher, Patrick: *Agile Mitarbeiterführung mit OKR - Grundlagen*. Video2brain. <https://www.lynda.com/de/Leadership-Management-tutorials/Agile-Mitarbeiterfuehrung-OKR/483938-2.html?org=hs-pforzheim.de>  
Retrieved: 03.09.2019



## OKR Retrospective

- The OKR retrospective takes place at team level and also takes place at the end of the cycle
- Topics of the retrospective are the OMC process and the way the team works
- It is particularly important during the meeting that a space is created for open criticism and unpleasant truths
- The team has the opportunity to review and improve itself and its way of working

Source: Jacob, Christian; Lobacher, Patrick: *Agile Mitarbeiterführung mit OKR - Grundlagen*. Video2brain. <https://www.lynda.com/de/Leadership-Management-tutorials/Agile-Mitarbeiterfuehrung-OKR/483938-2.html?org=hs-pforzheim.de>  
Retrieved: 03.09.2019



## OKR List

### Rules:

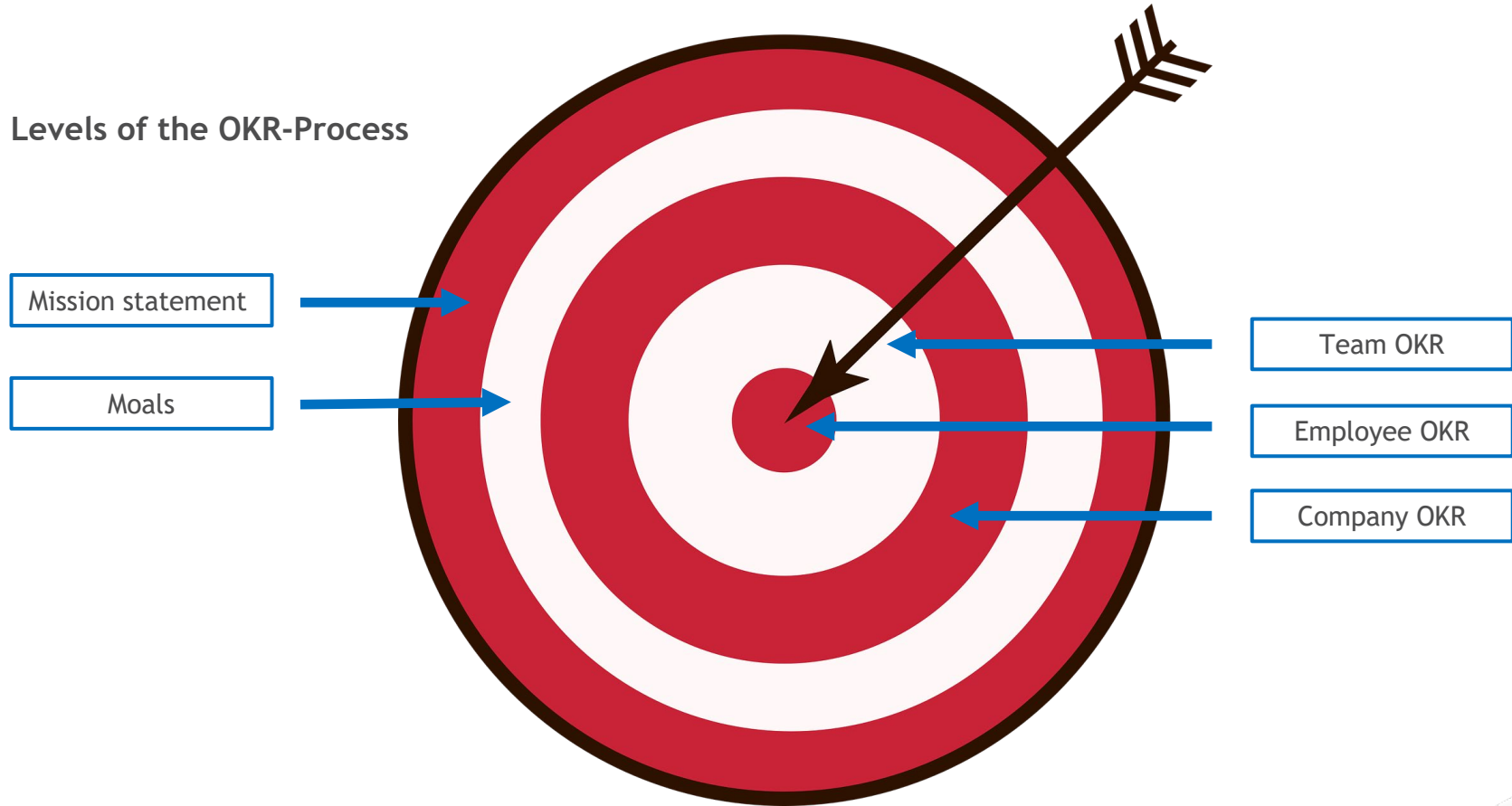
- Always up to date
- Company OKR maintained by OKR Master
- Team leader responsible for Team-OKR
- Employee-OKR maintained by employees themselves

### Purpose:

- Management instrument
- Control instrument
- Early indicator of possible crisis
- Makes synergies visible to employees
- Perfect status quo report at a glance



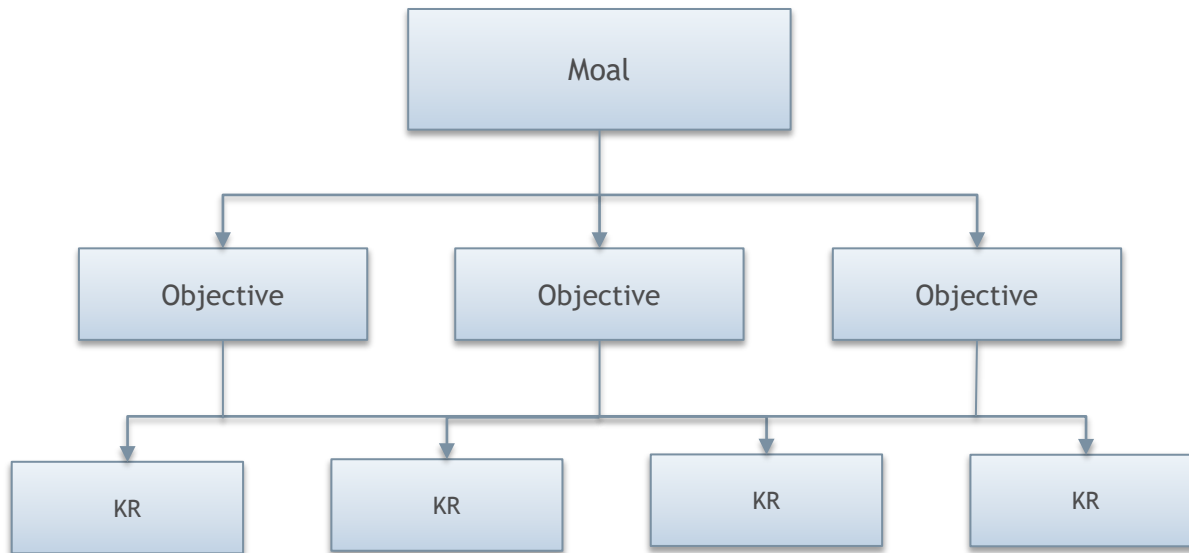
## Levels of the OKR-Process



Source: Jacob, Christian; Lobacher, Patrick: *Agile Mitarbeiterführung mit OKR - Grundlagen*. Video2brain. <https://www.lynda.com/de/Leadership-Management-tutorials/Agile-Mitarbeiterfuehrung-OKR/483938-2.html?org=hs-pforzheim.de>  
Retrieved: 03.09.2019



## Relationship between Goals - Objectives - Key Results

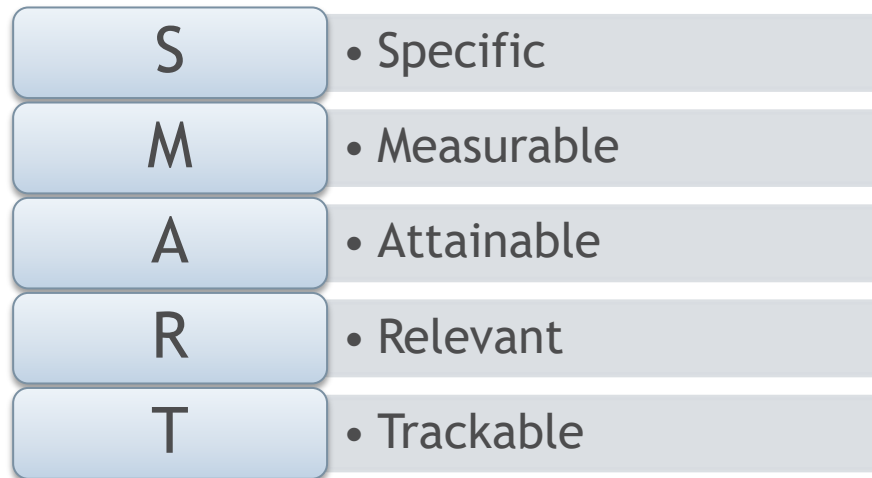


Source: Jacob, Christian; Lobacher, Patrick: *Agile Mitarbeiterführung mit OKR - Grundlagen*. Video2brain. <https://www.lynda.com/de/Leadership-Management-tutorials/Agile-Mitarbeiterfuehrung-OKR/483938-2.html?org=hs-pforzheim.de>  
Retrieved: 03.09.2019



## Objectives and key results

- Use of the SMART approach to define objectives and key Results



Source: Jacob, Christian; Lobacher, Patrick: *Agile Mitarbeiterführung mit OKR - Grundlagen*. Video2brain. <https://www.lynda.com/de/Leadership-Management-tutorials/Agile-Mitarbeiterfuehrung-OKR/483938-2.html?org=hs-pforzheim.de>  
Retrieved: 03.09.2019





## Types of Key Results

### 1. Baseline Metric KR

- No historical data available
- comparative figure must first be found

### 2. Target Metric KR

- Countable by nature

### 3. Milestone KR

- Individual Milestones

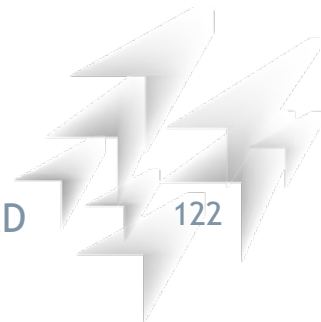
Source: Jacob, Christian; Lobacher, Patrick: *Agile Mitarbeiterführung mit OKR - Grundlagen*. Video2brain. <https://www.lynda.com/de/Leadership-Management-tutorials/Agile-Mitarbeiterfuehrung-OKR/483938-2.html?org=hs-pforzheim.de>  
Retrieved: 03.09.2019



## Benefits

- OKR combines long-term visions, missions, values and strategies with short-term operational planning
- OKR helps to concretize company goals and to connect them with the work of its employees
- OKR provides clarity about the most important tasks and enables independent work. It helps to set the right priorities and to pursue them consistently
- OKR makes success measurable without building up pressure to perform
- OKR ensures better communication
- OKR creates a sense of togetherness in the company

Source: Thomas, Jan: OKR: *Wie ein großes Orchester*. Berlin Valley: <https://berlinvalley.com/okr-agile-management-methode/>. Retrieved 03.09.2019



## 20. SUITABLE INDUSTRIES FOR AGILE



### Marketing or Advertising companies

1. Carsurfing:
  - Start-Up offering to find rides to and from an event
  - Getting feedback during the product development process itself has helped the company in meeting the expectations of the customers and achieve its marketing goals
2. Teradata Applications:
  - Business of selling software for the purpose of supporting marketing
  - Uses Agile methodologies to automate workflow and approval processes
  - Agile techniques for the improved communications within the project has helped them enhance their processes
3. CafePress:
  - Business of selling themed gifts and providing custom design services
  - Company has adopted Agile methodologies to interact with customers on various social media platforms
  - Their aim of engaging with customers and undertake real-time collaboration while they upload designs was made possible by using these methodologies

Narayanamurthi: *Top5 Industries That Are Adopting Agile Other Than Software*. <http://agileseeds.com/agile-in-other-industries/>. Agile Seeds. 31.01.2017. Retrieved: 03.09.2019

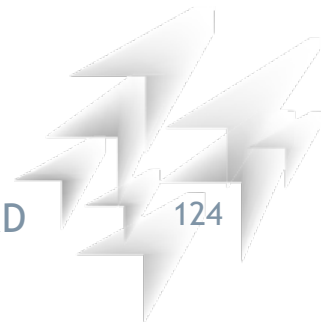


# 20. SUITABLE INDUSTRIES FOR AGILE



## Construction companies

- Characteristics: high capital, regulation risks and tough schedules
1. Noble Energy
    - Use of agile project management to ensure a timely exchange of information between the contractors and the project teams
    - Streamlined and automated workflows to keep up with the legal and regulatory requirements
  2. Schlumberger
    - Improving collaboration as per the Agile Development Principles can make the projects more efficient and result in maintenance of high quality.



# 20. SUITABLE INDUSTRIES FOR AGILE



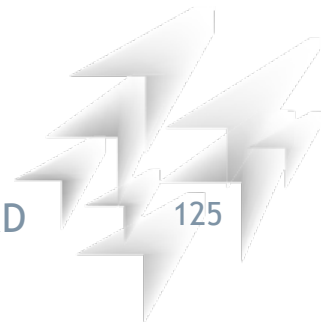
## Event planning companies

- Redgate
  - Adopting agile gave them the freedom to implement and execute their projects with the needed agility
  - Helps the company in meeting tight deadlines and ensuring utmost satisfaction of the end customer

## Product development companies

1. Wikispeed
  - Development of a functional prototype of a 100mpg car in just three month → using Agile radical management methods (generally process is spanning over multiple years)
  - With the help of Agile Wikispeed has been able to bring innovation at a much faster pace in an industry where development cycles can go on for decades

Narayanamurthi: *Top5 Industries That Are Adopting Agile Other Than Software*. <http://agileseeds.com/agile-in-other-industries/>. Agile Seeds. 31.01.2017. Retrieved: 03.09.2019



# 20. SUITABLE INDUSTRIES FOR AGILE



## 2. Lego Digital Solutions

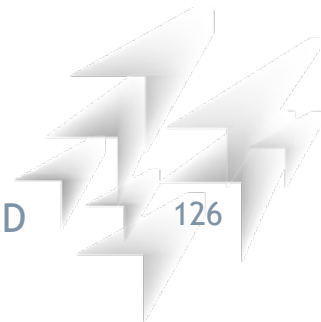
- made use of the Agile methodologies to ensure efficient communications among the 20-odd teams working on the same project with different requirements
- Agile helped LIGO in ensuring client collaboration and developing a platform to be used in the future

## Finance related companies

### 1. Principal Financial Group

- Insurance provider and retirement planning firm
- using agile methodologies to ensure that business and IT unit leaders come together on the requirements of the feature in sprints which are two weeks long

Narayanamurthi: *Top5 Industries That Are Adopting Agile Other Than Software*. <http://agileseeds.com/agile-in-other-industries/>. Agile Seeds. 31.01.2017. Retrieved: 03.09.2019



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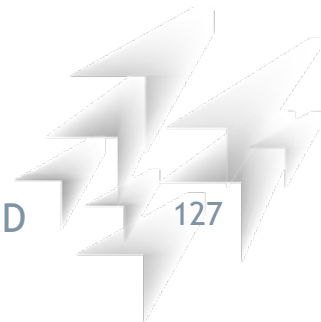
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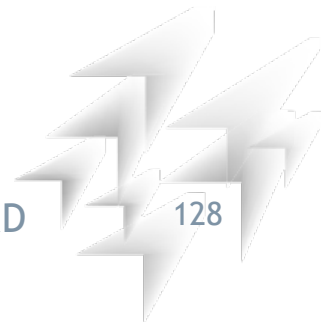
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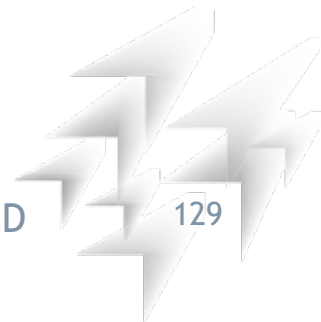
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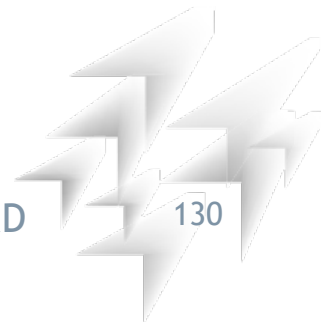
# 20. SUITABLE INDUSTRIES FOR AGILE



## 2. LMAX Exchange

- a multilateral trading facility, has grown fond of the mature Agile process
- Test-driven development and continuous delivery, as practiced by LMAX exchange, have changed the company's fortunes for the better

Narayanamurthi: *Top5 Industries That Are Adopting Agile Other Than Software*. <http://agileseeds.com/agile-in-other-industries/>. Agile Seeds. 31.01.2017. Retrieved: 03.09.2019



# 21. MORE OR LESS SUITABLE INDUSTRIES FOR AGILE



## 1. Projects that are not very urgent, not too complex or not novel

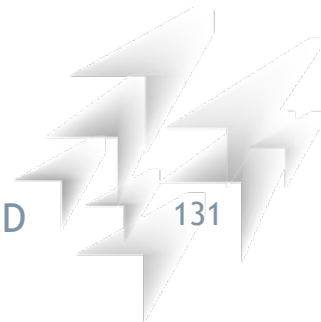
- There is no need to use agile methodology for simple or typical projects

⇒ agile is demanding

## 2. No self-organizing teams and lack professional developers

- If developers are not experienced and responsible enough, this may ruin the whole project
- If one of the teams shows poor performance, this will definitely affect the overall result

Kukhnavets, Pavel: When not to use Agile. Hygger.21.05.2018. <https://hygger.io/blog/when-not-to-use-agile/>, retrieved: 03.09.2019



# 21. MORE OR LESS SUITABLE INDUSTRIES FOR AGILE



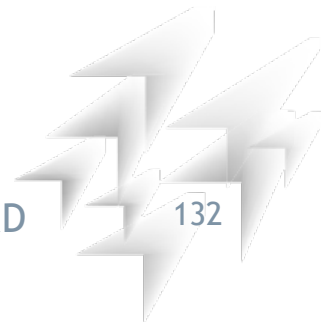
### 3. Customer requires neat documentation of each development cycle

- Customer needs detailed documentation of each phase of the project
- ⇒ Requires to hold for infrastructure applications, which are designed to support a process for a long period of time

### 4. Customer requires approvals at each stage of development

- Customer demand the company to deliver software pieces for approval at each development cycle
- Development of software for a bureaucratic organization with strict rules or processes

Kukhnavev, Pavel: When not to use Agile. Hygger.21.05.2018. <https://hygger.io/blog/when-not-to-use-agile/>, retrieved: 03.09.2019



## 22. PRACTICE EXAMPLE (IBM)

### Enterprise Design Thinking

⇒ Combination of agile and design thinking

- Enterprise Design Thinking is the framework at IBM

- used to:

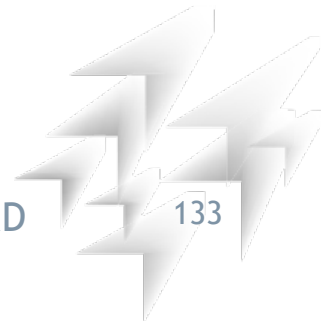
- collaborate online,

- align teams

- explain its intent to solve users' problems while improving the customer experience at the pace and scale demanded by today's enterprise.

⇒ The focus is on the results that excite your users and add value to help you achieve your business goals

Source: IBM: <https://www.ibm.com/de-de/services/business/design-thinking>, retrieved: 04.09.2019

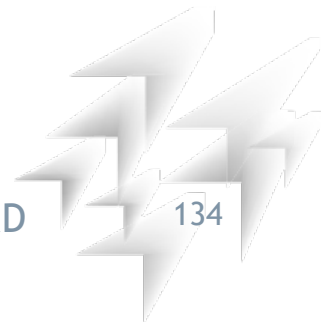


## 22. PRACTICE EXAMPLE (IBM)

### Design Thinking Principles

- Principles to look at problems and solutions from a new perspective.
- These principles form the basis for delivering solutions that meet the users' expectations.
- These principles include:
  - Focus on user outcomes
  - Various mature teams
  - Continuous reinvention

Source: IBM: <https://www.ibm.com/de-de/services/business/design-thinking>, retrieved: 04.09.2019

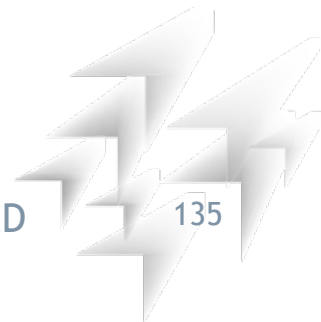


## 22. PRACTICE EXAMPLE (IBM)

### Design Thinking Loop

- This model is called the "loop", a continuous cycle of
  - observation
  - reflection and
  - action
- Proceed in any order and go through as many iterations as necessary.
- continuous improvement is that you are never done → there will always be an better solution.

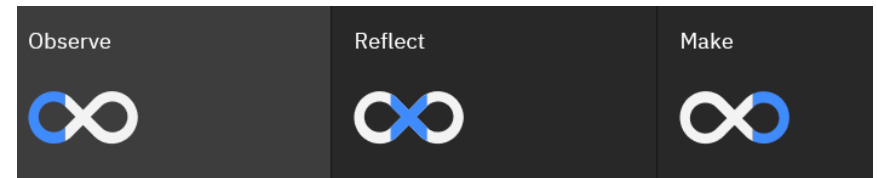
Source: IBM: <https://www.ibm.com/design/thinking/page/framework/loop>, retrieved: 04.09.2019



## 22. PRACTICE EXAMPLE (IBM)

### Design Thinking Loop

- Observe:
  - Get to know the users → understand their hopes, fears and goals that motivate them
  - Understand the context → watch users interact with people and tools in their environment
  - Uncover needs → read between the lines to find out the customers' needs
  - Listen for feedback → capture their feedback when they test your ideas



Source: IBM: <https://www.ibm.com/design/thinking/page/framework/loop>, retrieved: 04.09.2019





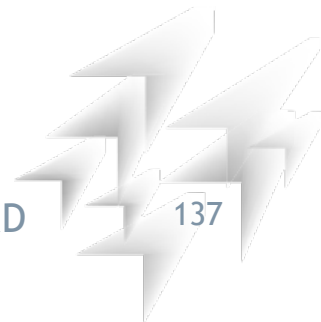
## 22. PRACTICE EXAMPLE (IBM)

### Design Thinking Loop

- Reflect:
  - Align on intent → coming to a common understanding of the users
  - Uncover new insights → synthesize the knowledge to uncover hidden insight that illuminates the path forward
  - Plan ahead → deciding together the next move



Source: IBM: <https://www.ibm.com/design/thinking/page/framework/loop>, retrieved: 04.09.2019



## 22. PRACTICE EXAMPLE (IBM)

### Design Thinking Loop

- Make:
  - Explore possibilities → Think with the hands to uncover new ideas in real time instead of waiting until an idea is perfect
  - Communicate ideas → don't tell people about the idea but show them
  - Prototype concepts → prototypes help to validate or invalidate the hypotheses and assumptions
  - Drive outcomes → turn intent into an outcome



Source: IBM: <https://www.ibm.com/design/thinking/page/framework/loop>, retrieved: 04.09.2019

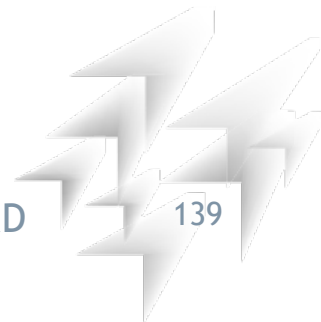


## 22. PRACTICE EXAMPLE (IBM)

### Design Thinking Loop

- Benefits:
  - The model drives our customers to understand the present and shape the future.
  - The model enables customers to build on their successes and learn from their mistakes.
  - The loop model allows customers to move forward successfully, despite the uncertainty about the future.

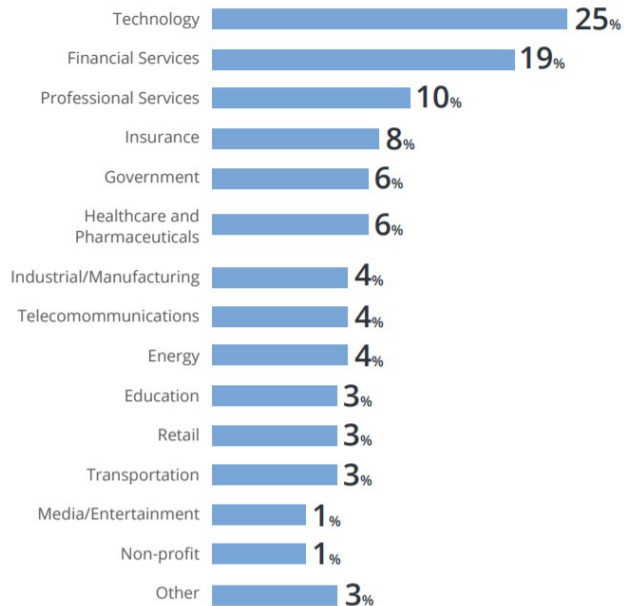
Source: IBM: <https://www.ibm.com/design/thinking/page/framework/loop>, retrieved: 04.09.2019



# 23. DATA AND FACTS

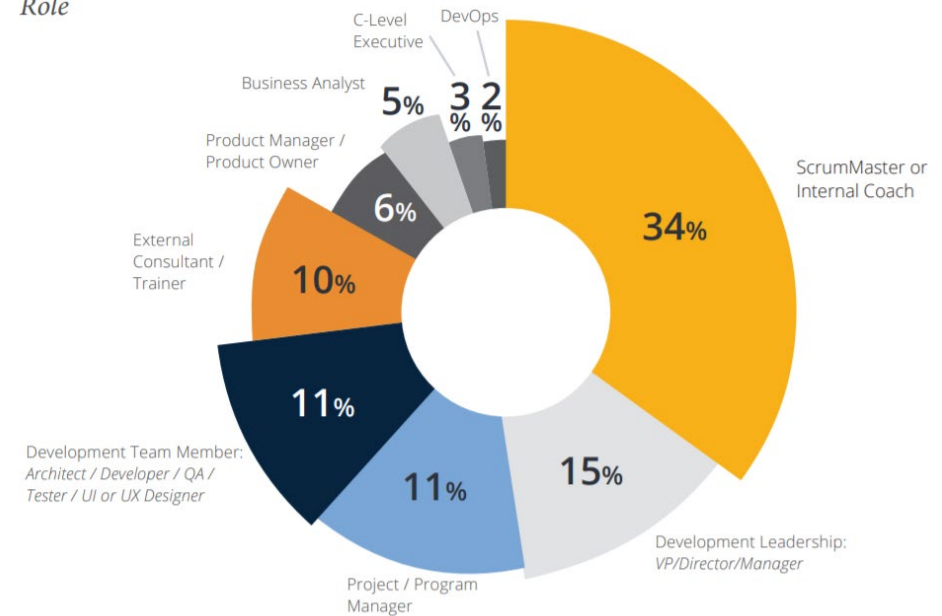
## Industries

Industries respondents worked in:



## RESPONDENT DEMOGRAPHICS

Role



Source: 13<sup>th</sup> annual state of agile report. Collabnetversionone. [www.stateofagile.com](http://www.stateofagile.com), retrieved: 03.09.2019



## 23. DATA AND FACTS

### Reasons for adopting Agile



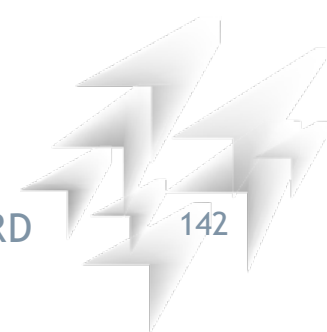
Source: 13<sup>th</sup> annual state of agile report. Collabnetversionone. [www.stateofagile.com](http://www.stateofagile.com), retrieved: 03.09.2019



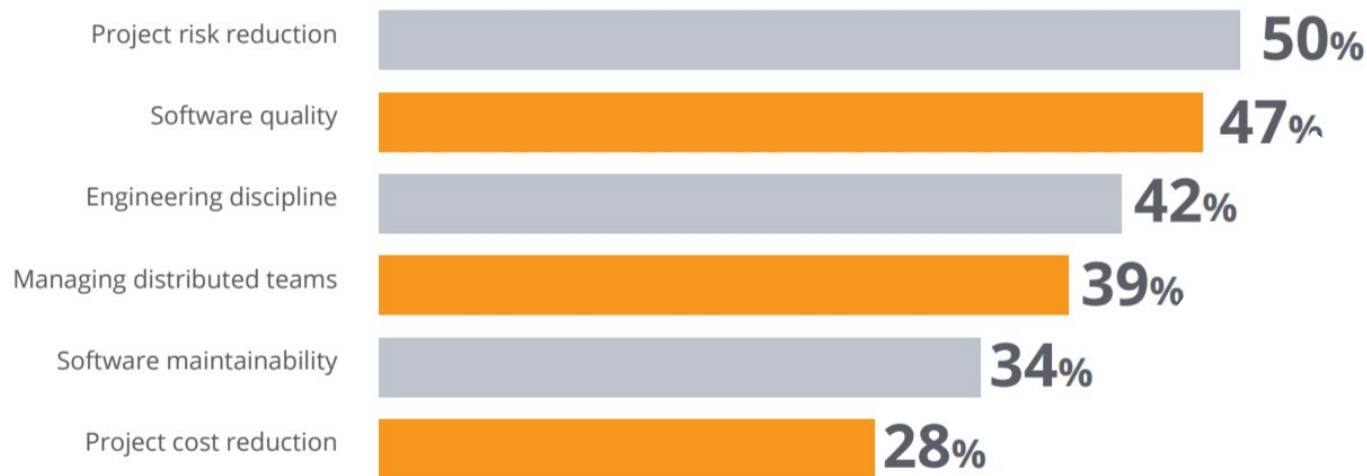
## Benefits of adopting Agile



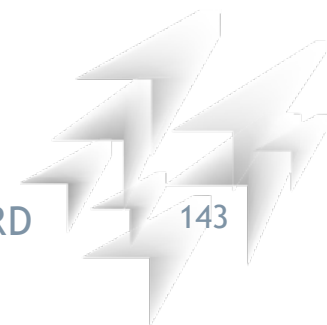
Source: 13<sup>th</sup> annual state of agile report. Collabnetversionone. [www.stateofagile.com](http://www.stateofagile.com), retrieved: 03.09.2019



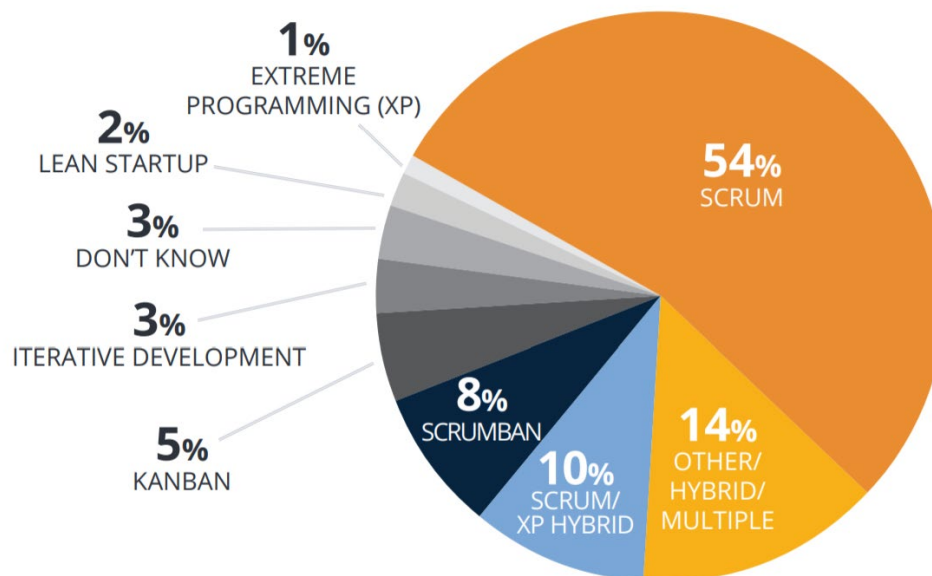
## Benefits of adopting Agile



Source: 13<sup>th</sup> annual state of agile report. Collabnetversionone. [www.stateofagile.com](http://www.stateofagile.com), retrieved: 03.09.2019



## Agile methodologies used



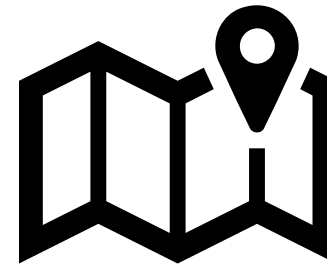
Source: 13<sup>th</sup> annual state of agile report. Collabnetversionone. [www.stateofagile.com](http://www.stateofagile.com), retrieved: 03.09.2019





## 24. STAGE-GATE MODEL: INTRODUCTION AND DEFINITION

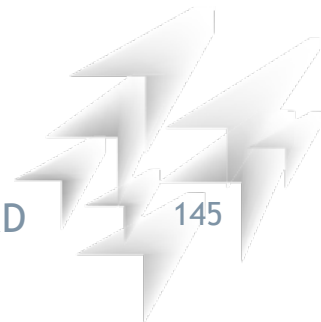
- Stage-Gate process: standardized process model for the development of product innovations, introduced by Robert Cooper
- Division of the innovation project into several stages → similar to the terms of content and requirements
- Each stage contains cross-departmental activities
- Between the stages are gates/milestones where the further decisions are made → based on defined criteria and deliverables
- Stage-Gate processes were developed to deal with the random and disorganized, often chaotic, approach to new-product development



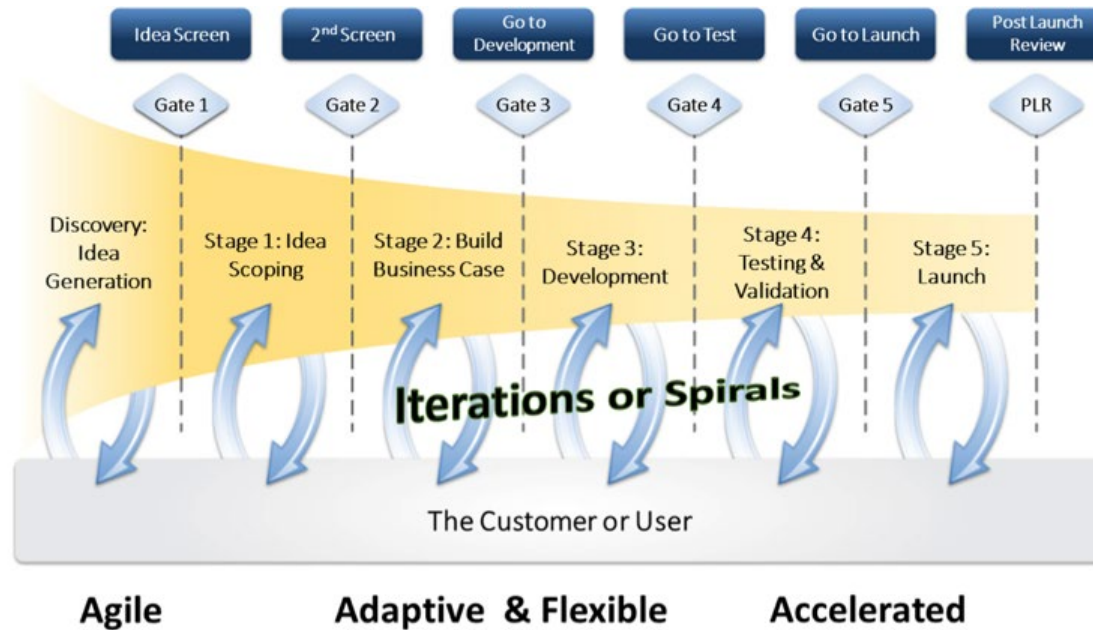
Source: <https://wirtschaftslexikon.gabler.de/definition/stage-gate-modell-46893>, retrieved 12.11.2019

Source: Integrating Agile with Stage-Gate. Innovationmanagement: <https://www.lead-innovation.com/blog/hat-der-innovationsprozess-nach-dem-stage-gate-modell-ausgedient>, retrieved 12.11.2019

Source: <https://innovationmanagement.se/2016/08/09/integrating-agile-with-stage-gate/>, retrieved 12.11.2019



# 24. TYPICAL STAGE-GATE MODEL



Source: Integrating Agile with Stage-Gate. Innovationmanagement: <https://innovationmanagement.se/2016/08/09/integrating-agile-with-stage-gate/>, retrieved: 12.11.2019



## 24. STAGE-GATE MODEL: CHALLENGES AND CRITICISM

- Developing innovations in the form of new products or services is one of the most demanding management tasks
- The process of innovation requires professional models and methods
- Challenges:
  - ❑ **Uncertainty:** Output is something new / first time issue
  - ❑ **Interdisciplinary:** involvement of almost all corporate divisions
  - ❑ **Scope:** Innovation brings change → people react with great resistance
  - ❑ **Individuality:** each output is individual in the innovation process

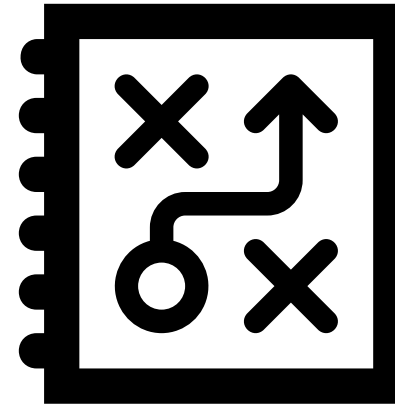


Source: Lead Innovation Management: <https://www.lead-innovation.com/english-blog/stage-gate-model>, retrieved: 12.11.2019

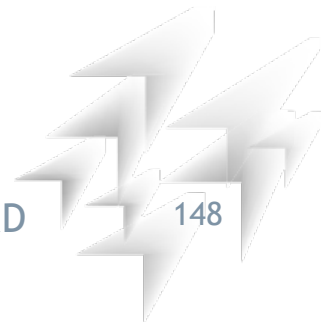


## 24. STAGE-GATE MODEL: CHALLENGES AND CRITICISM II

- Rapid changing customer needs and wants
  - Faster-paced world/growing pace of innovation
    - plans often change
  - The process is too linear, not adaptive enough and does not encourage experimentation
- => Demand that Stage-Gate become more adaptive, more agile and more accelerated



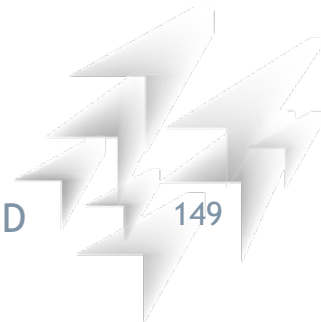
Source: Integrating Agile with Stage-Gate. Innovationmanagement: <https://innovationmanagement.se/2016/08/09/integrating-agile-with-stage-gate/>, retrieved: 12.11.2019



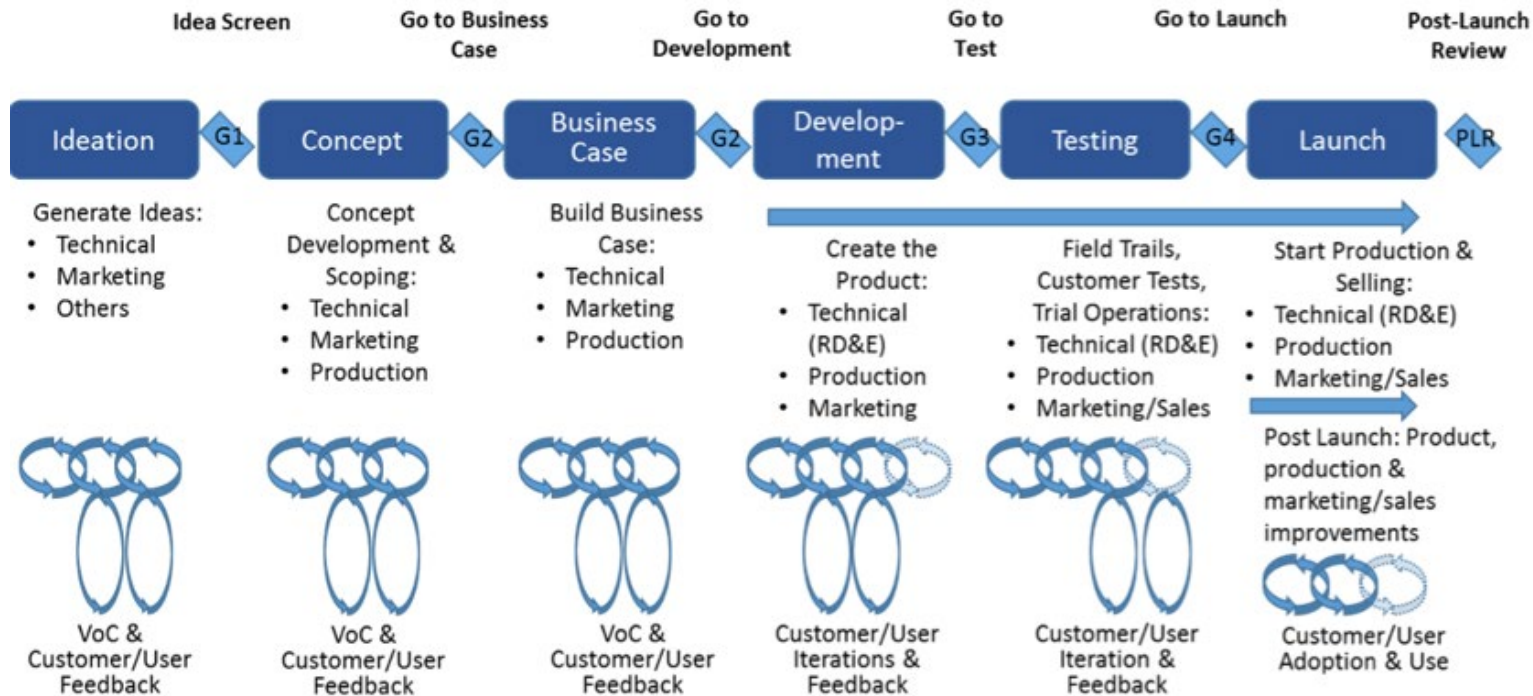
## 24. CHARACTERISTICS OF STAGE-GATE VS. AGILE

	Stage-Gate	Agile
Type	Microplanning	Microplanning, project management
Scope	Idea to launch	Development and testing, can be used to pre-development
Organization	Cross-functional Team	Technical team
Decision model	Investment model - go/kill decisions involve senior governance group	Tactical model - decisions for next sprint made largely by self-managed team

Source: Robert G. Cooper (2016) Agile-Stage-Gate Hybrids, Research-Technology Management, 59:1, 21-29



# 24. INTRODUCTION TO THE AGILE-STAGE-GATE HYBRID MODEL



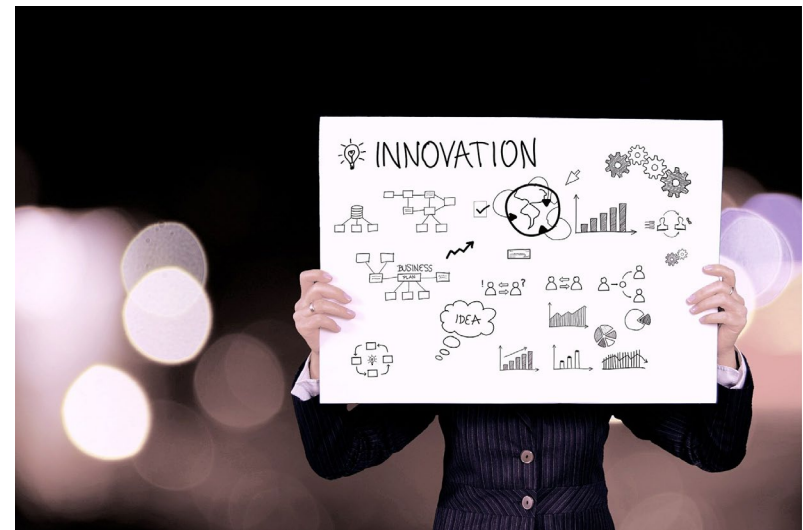
> the new hybrid method can be used in all stages from Discovery to Launch

Source: Integrating Agile with Stage-Gate. Innovationmanagement: <https://innovationmanagement.se/2016/08/09/integrating-agile-with-stage-gate/>, retrieved: 12.11.2019



## 24. THE AGILE-STAGE-GATE HYBRID MODEL






- Integration of principles and methods from agile project management
  - To deal with new challenges
- Framework for dealing with uncertainties and ambiguity in the front-end
- Process acceleration through time-boxed iterations
- Focus on the results → via development of tangible product increments as measure of progress
- Increasing the success rate:
  - Project team interacts with users and customers
  - Starting in early stages to get valuable feedback



Source: Integrating Agile with Stage-Gate. Innovationmanagement: <https://innovationmanagement.se/2016/08/09/integrating-agile-with-stage-gate/>, retrieved: 12.11.2019



## 24. AGILE-STAGE-GATE HYBRID MODEL: BENEFITS

-  Positive influence on performance metrics
-  More adaptive → faster response to changing product requirements
-  Better team communication
-  Higher team spirit
-  Faster to market

Source: Integrating Agile with Stage-Gate. Innovationmanagement: <https://innovationmanagement.se/2016/08/09/integrating-agile-with-stage-gate/>, retrieved: 12.11.2019





## 25. SOFTWARE APPLICATION

### Jira

- Nr. 1 software tool for agile working
- Used for example by ebay, Spotify, airbnb

### Functions:

- Plan
- Track
- Execute
- Report



Source: <https://www.atlassian.com/de/software/jira>, retrieved: 08.11.2019



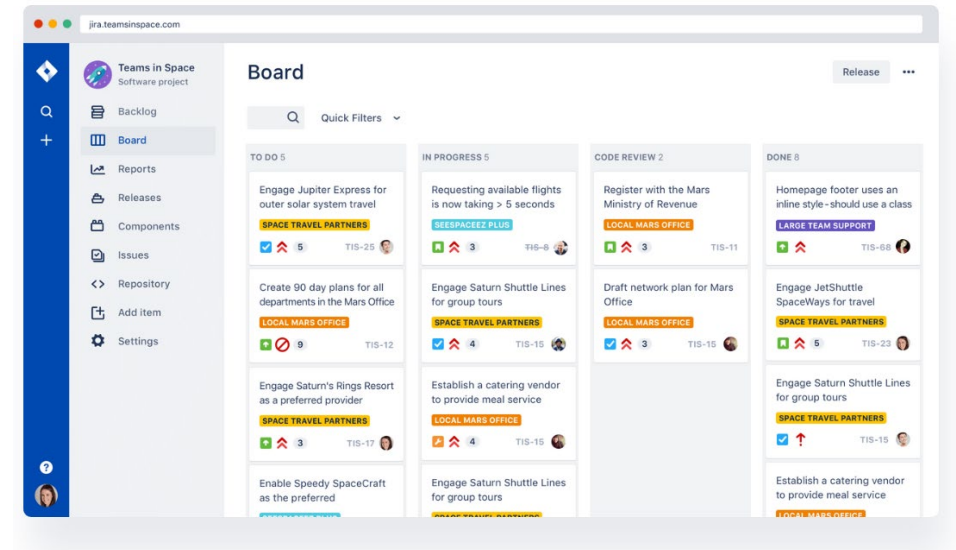
# 25. SOFTWARE APPLICATION

## Plan:

- Creation of User-Stories and processes
- Sprint planning
- Assign tasks

## Track:

- Priorising of tasks
- Discuss the work of the team in context with transparency



Source: <https://www.atlassian.com/de/software/jira>, retrieved: 08.11.2019



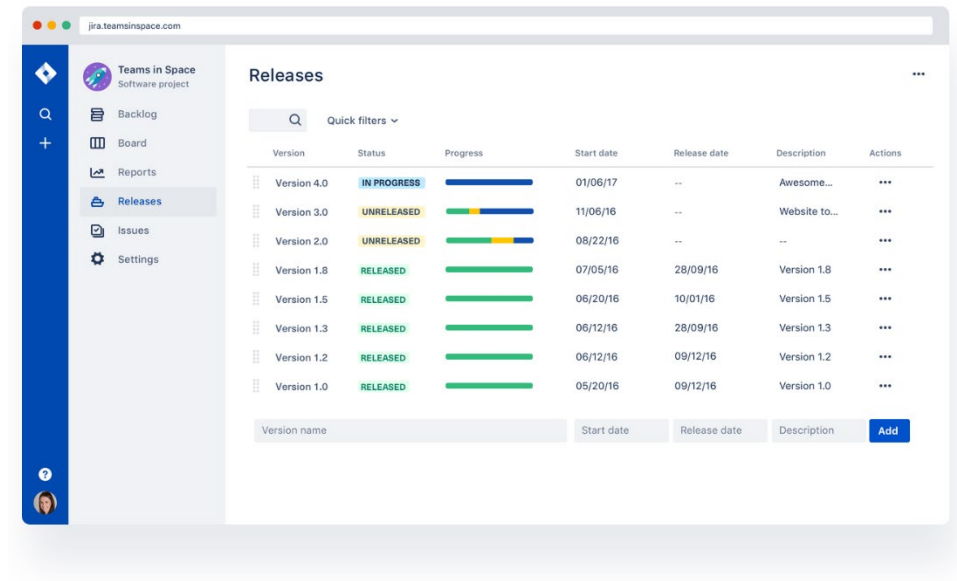
# 25. SOFTWARE APPLICATION

## Execute:

- Deliver the results with confidence and serenity
- Information always up to date

## Report:

- Improvement of the team performance based on real time data



Source: <https://www.atlassian.com/de/software/jira>, retrieved: 08.11.2019



# 25. SOFTWARE APPLICATION



**Free**

0 \$

**Standard**

7 \$ per month and user

**Premium**

15 \$ per month and user



max. 10 user

max. 5000 user

max. 5000 user



- Scrum boards
- Backlog
- Reporting
- ...

- Scrum boards
- Backlog
- Reporting
- Audit protocol
- ...

- Scrum boards
- Backlog
- Reporting
- Audit protocol
- SLA\* for 99 % availability

\* Service Level Agreement

Source: <https://www.atlassian.com/de/software/jira/pricing>, retrieved: 08.11.2019



## 25. SOFTWARE APPLICATION

### Confluence

- High performance tool for collaboration within teams
- Used for example by NASA, Lufthansa, Spotify

### Functions:

- Project planning
- Meeting notes
- Product requirements
- Marketing plan
- Blog Post

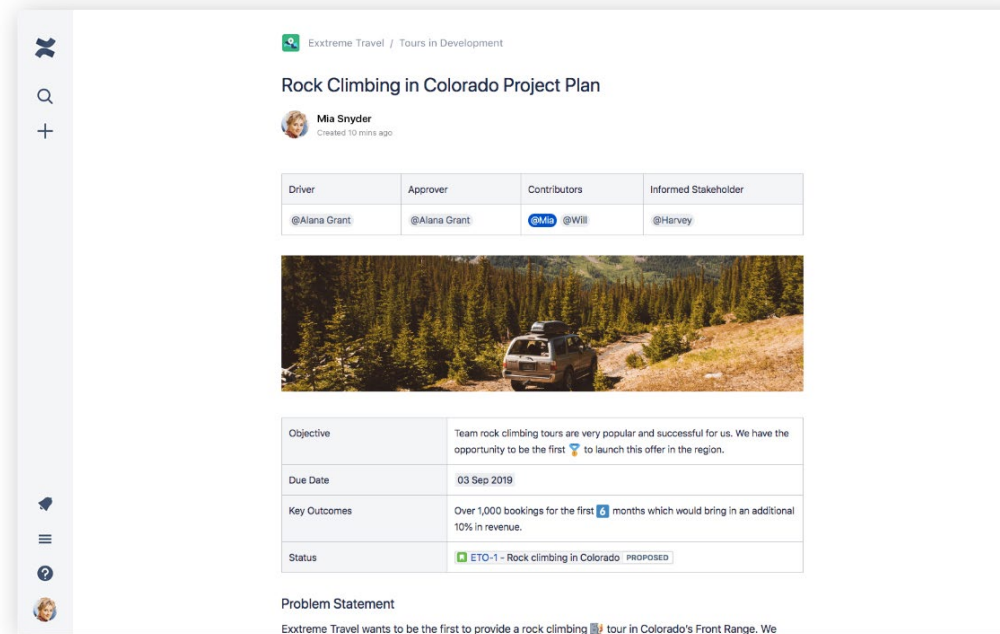


Source: <https://www.atlassian.com/de/software/confluence>, retrieved: 08.11.2019



# 25. SOFTWARE APPLICATION

## Project planning



The screenshot shows a Confluence page for a project plan. At the top, it says 'Extreme Travel / Tours in Development'. The title is 'Rock Climbing in Colorado Project Plan' by Mia Snyder. Below the title is a table with columns: Driver, Approver, Contributors, and Informed Stakeholder. The table contains the following data:

Driver	Approver	Contributors	Informed Stakeholder
@Alana Grant	@Alana Grant	@Mia @Will	@Harvey

Below the table is a photograph of a car parked on a dirt road in a forested area. Underneath the photo is a table with project details:

Objective	Team rock climbing tours are very popular and successful for us. We have the opportunity to be the first 🏆 to launch this offer in the region.
Due Date	03 Sep 2019
Key Outcomes	Over 1,000 bookings for the first 4 months which would bring in an additional 10% in revenue.
Status	ETO-1 - Rock climbing in Colorado <span>PROPOSED</span>

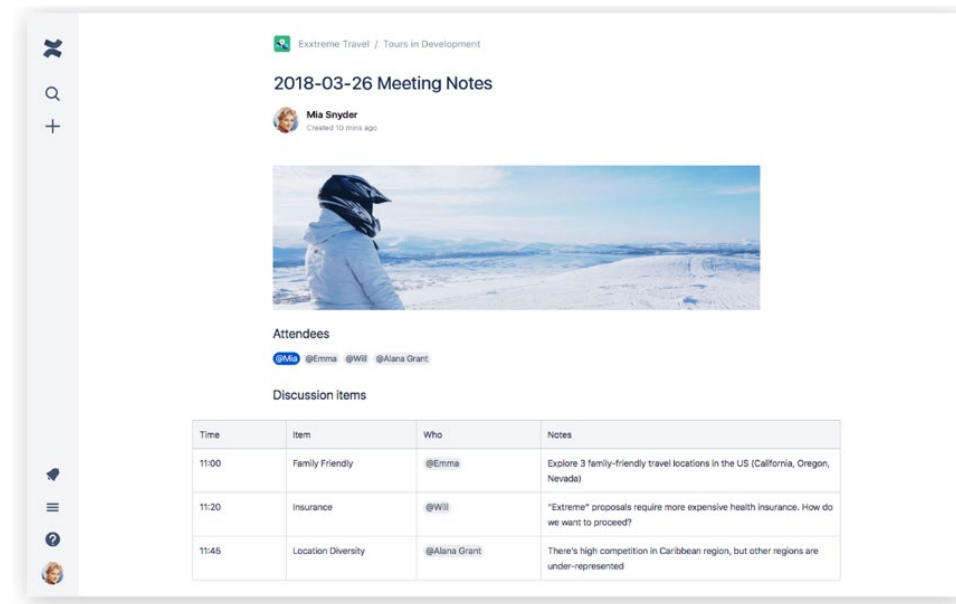
Below the table is a 'Problem Statement' section with the text: 'Extreme Travel wants to be the first to provide a rock climbing 🧗 tour in Colorado's Front Range. We'

Source: <https://www.atlassian.com/de/software/confluence>, retrieved: 08.11.2019



# 25. SOFTWARE APPLICATION

## Meeting notes



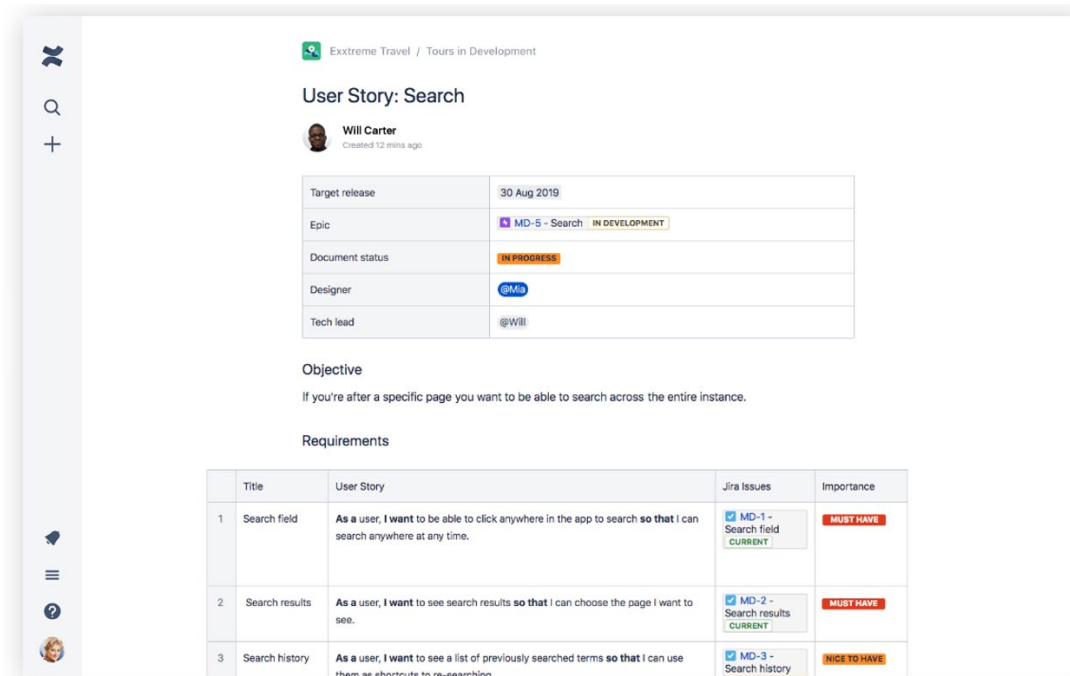
The screenshot shows a Confluence page titled "2018-03-26 Meeting Notes" under the space "Extreme Travel / Tours in Development". The page was created by Mia Snyder 10 minutes ago. It features a photo of a person in a white jacket and helmet looking out over a snowy landscape. Below the photo, the attendees are listed as @Emma, @Will, and @Alana Grant. A "Discussion Items" table is also present.

Time	Item	Who	Notes
11:00	Family Friendly	@Emma	Explore 3 family-friendly travel locations in the US (California, Oregon, Nevada)
11:20	Insurance	@Will	"Extreme" proposals require more expensive health insurance. How do we want to proceed?
11:45	Location Diversity	@Alana Grant	There's high competition in Caribbean region, but other regions are under-represented

Source: <https://www.atlassian.com/de/software/confluence>, retrieved: 08.11.2019



## Product requirements



The screenshot shows a Jira user story page for 'Search' in the 'Exxtreme Travel / Tours in Development' project. The user story is created by Will Carter 12 minutes ago. It includes a table with metadata: Target release (30 Aug 2019), Epic (MD-5 - Search, IN DEVELOPMENT), Document status (IN PROGRESS), Designer (@Ma), and Tech lead (@Will). Below the metadata is the Objective: 'If you're after a specific page you want to be able to search across the entire instance.' The Requirements section contains a table with three items:

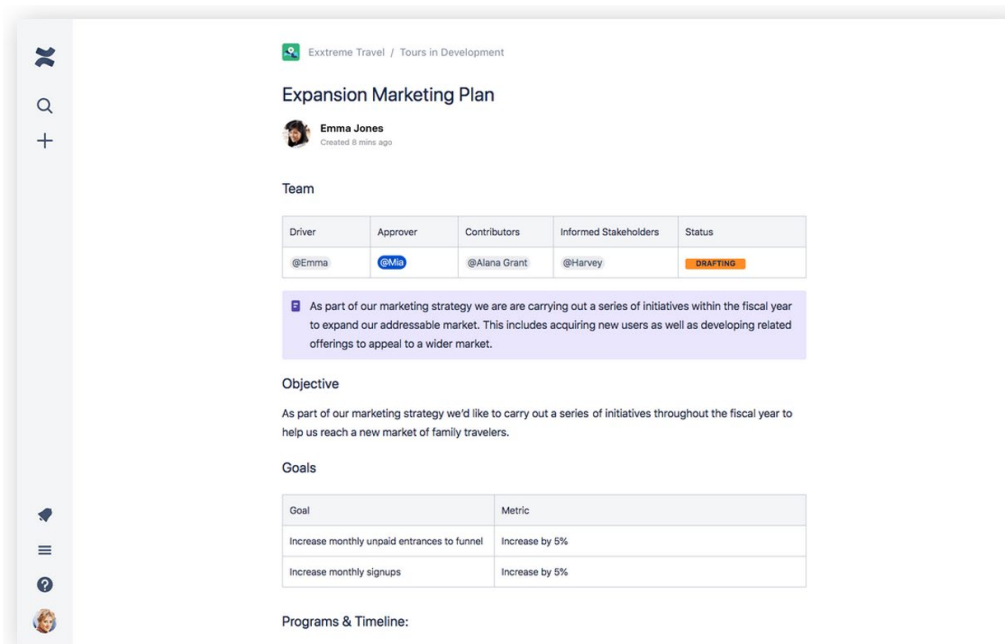
Title	User Story	Jira Issues	Importance
1 Search field	As a user, I want to be able to click anywhere in the app to search so that I can search anywhere at any time.	<input checked="" type="checkbox"/> MD-1 - Search field CURRENT	MUST HAVE
2 Search results	As a user, I want to see search results so that I can choose the page I want to see.	<input checked="" type="checkbox"/> MD-2 - Search results CURRENT	MUST HAVE
3 Search history	As a user, I want to see a list of previously searched terms so that I can use them as shortcuts to re-searching.	<input checked="" type="checkbox"/> MD-3 - Search history	NICE TO HAVE

Source: <https://www.atlassian.com/de/software/confluence>, retrieved: 08.11.2019





## Marketing plan



Exxtreme Travel / Tours in Development

### Expansion Marketing Plan

**Emma Jones**  
Created 8 mins ago

**Team**

Driver	Approver	Contributors	Informed Stakeholders	Status
@Emma	@Mia	@Alana Grant	@Harvey	DRAFTING

As part of our marketing strategy we are carrying out a series of initiatives within the fiscal year to expand our addressable market. This includes acquiring new users as well as developing related offerings to appeal to a wider market.

**Objective**

As part of our marketing strategy we'd like to carry out a series of initiatives throughout the fiscal year to help us reach a new market of family travelers.

**Goals**

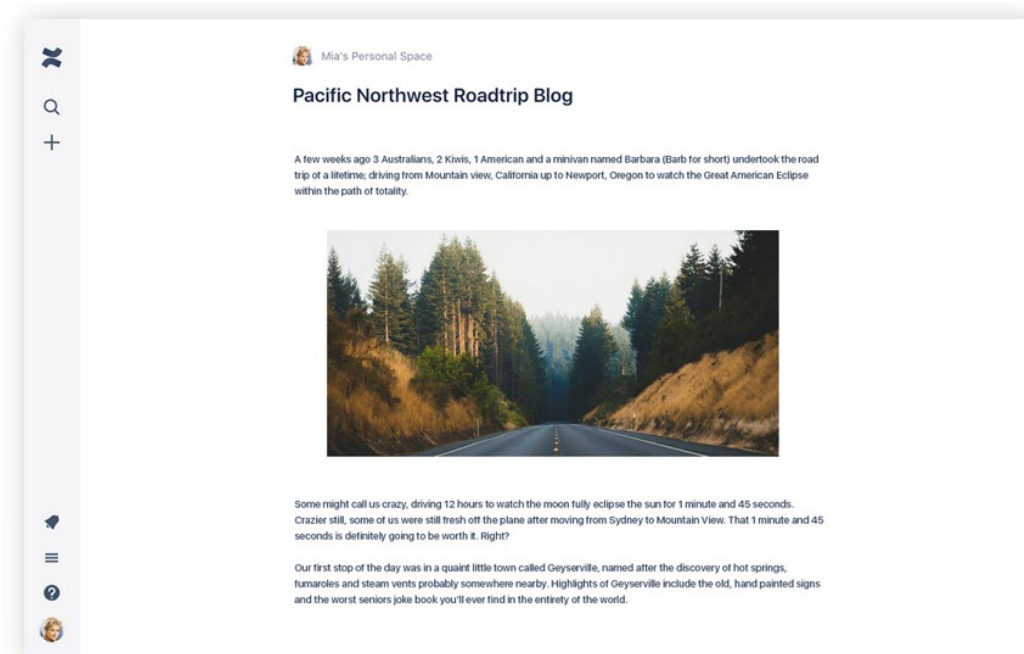
Goal	Metric
Increase monthly unpaid entrances to funnel	Increase by 5%
Increase monthly signups	Increase by 5%

**Programs & Timeline:**

Source: <https://www.atlassian.com/de/software/confluence>, retrieved: 08.11.2019



## Blog post



Source: <https://www.atlassian.com/de/software/confluence>, retrieved: 08.11.2019



# 25. SOFTWARE APPLICATION



**Free**

**Standard**

**Premium**

0 \$

5 \$ per month and user

10 \$ per month and user



max. 10 user

11 - 100 user

1 - 100 user

\* Service Level Agreement

Source: <https://www.atlassian.com/de/software/confluence>, retrieved: 08.11.2019

