

A Company's Transformation to Agile: Year 2 Retrospective - Scaling Scrum

Agile SoCal: The Southern California Agile User Group
October 21st, 2015

Ben Rodilitz, [Dealer.Com](#)

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Agenda:

- Who (A little about Dealer.com)
- Why (What were the goals in scaling scrum)
- How (What are the elements in scaling and how are they implemented)
- How it is going (wins and challenges)
- Q&A

Agenda

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Who (a little about Dealer.com)

- Start (EarthCars.com – Burlington VT, 1998)
 - SmartSites
 - Web sites, analytics, inventory, CRM, SEO, Paid search
 - “Click to Curb”
 - Then Dealertrack...then Cox Automotive
- Culture
 - Employee-centric – Work/Life balance
 - Accessibility

“Guided by a belief in collaborative innovation, we’ve grown into a category leader while staying true to our relentlessly agile and adaptable roots. The result is an award-winning culture in which everyone is approachable, ideas are judged on their merits, and healthy, empowered people drive transformative technology and exceptional service.”
- Manhattan Beach
- Me
 - Full SDLC: MRD, PRD, FRD, Design, Dev, QA
 - Long-time Ganthed (MS Project, EVM), PMP, CSM
 - Taught Problem Solving: What’s the problem we’re solving, stable substructures, constant feedback



Who Are the Players?

- The topology:
 - 5 Locations across the US
 - 10 Release Trains
 - 41 Agile Teams
 - 397 Team Members
- Roles:
 - Stakeholders
 - Product Manager
 - Product Architect
 - UX Architect
 - RTE (Release Train Engineer)
 - Product Owner
 - ScrumMaster
 - Tech Lead

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Goals of Scaling/Planning

- Provide leadership “plannability”
 - Give them a vehicle to describe their “asks”
 - Feed back to them what the team can do
 - Give them chances to re-plan (and re-plan) (and re-plan)
- Emphasize Providing Value
 - Finish and release whole features
 - Prioritization options
 - Raw priority
 - WSJF (Weighted Shortest Job First)

What does this picture have to do with Scaling Agile?

(Don't shout it out)



Hint: #70 on “AFI'S 100 GREATEST MOVIE QUOTES OF ALL TIME”

“Is it SAFE?”

Start with Why *

Focus on Goals rather than Methodology

- Providing leadership “plannability”
- Emphasis on Providing Value

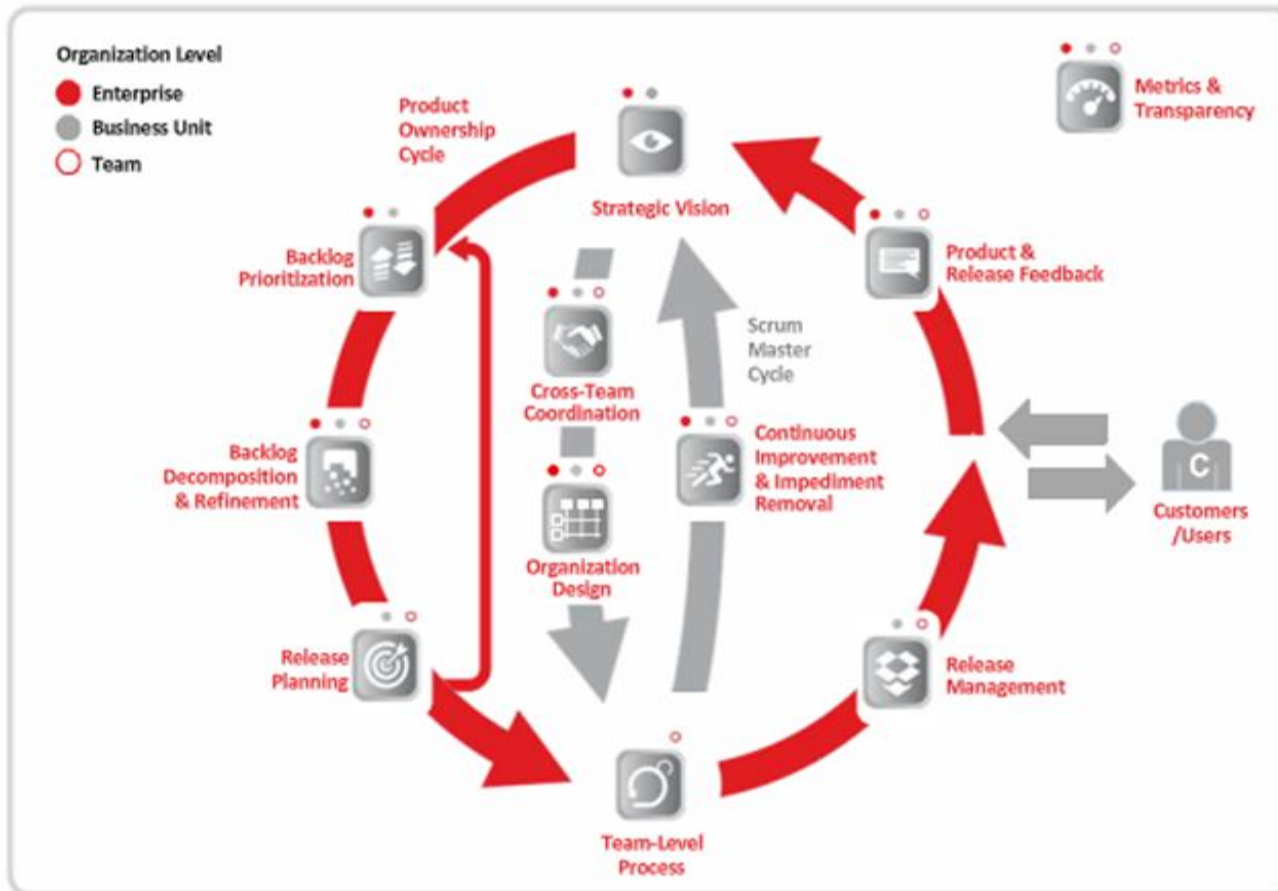
Understand the “Why”, not just the What and the How

(even though I’m about to spend a lot of time on the “what” and the “how”)

* Book by Simon Sinek (2011)

Generic Building Blocks

A Modular Framework for Scaling Scrum



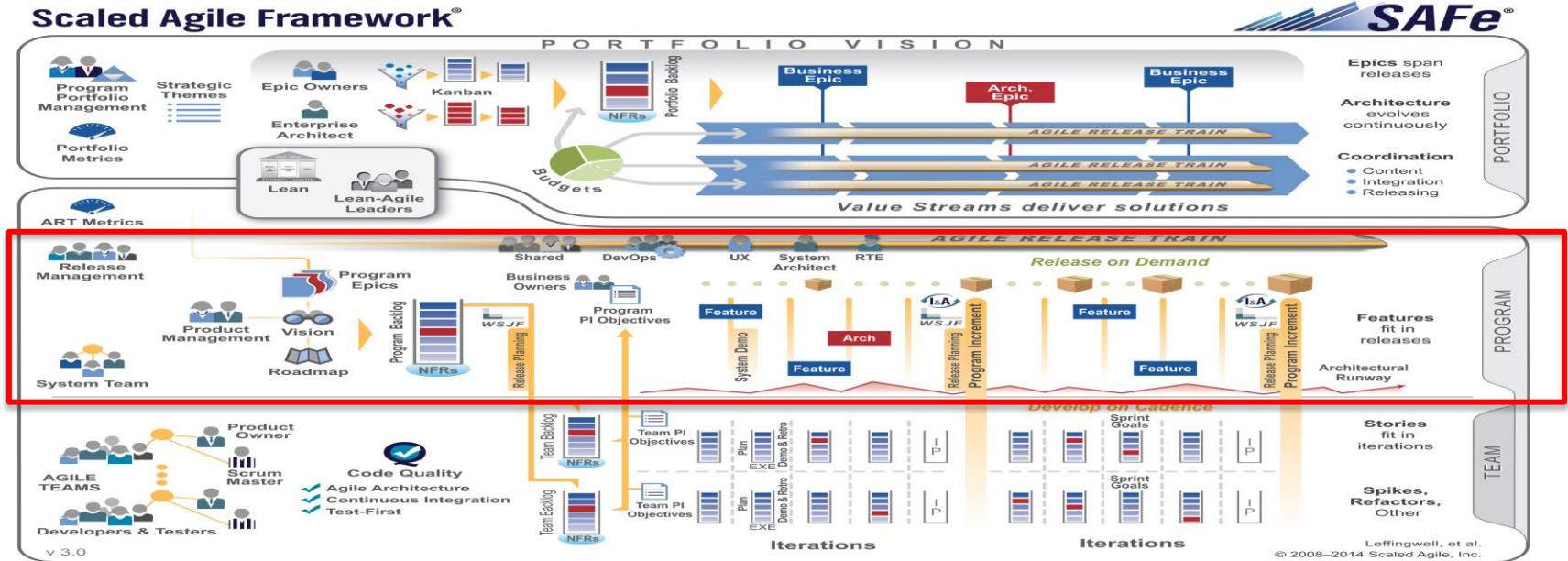
LEARNING CONSORTIUM
FOR THE CREATIVE ECONOMY



Alex
Brown

So...Is It SAFe?

... “ish”



<http://scaledagileframework.com>

Focus is on Program Level, following a quarterly cadence
Small tweaks to better align with Dealer.com leadership/resources.

Nomenclature

- Themes – long-range strategic goals
- Epics – Multi-quarter: Made up of related Features
- Feature – Quarterly cadence - One quarter's worth of work
- Story – decomposed Features into sub-sprint-sized bites

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Schedule: Year/Quarter

Year	Quarter	Sprint	Sprint Start	Sprint End	Quarterly Planning	Holidays
2016	1	1	1/13/2016	1/26/2016		MLK - 1/18
2016	1	2	1/27/2016	2/9/2016		
2016	1	3	2/10/2016	2/23/2016		
2016	1	4	2/24/2016	3/8/2016		
2016	1	5	3/9/2016	3/22/2016		
2016	1	6	3/23/2016	4/5/2016		Easter Sunday 3/27
2016	1	HIP	4/6/2016	4/19/2016	4/18-->4/19	
2016	2	1	4/20/2016	5/3/2016		
2016	2	2	5/4/2016	5/17/2016		
2016	2	3	5/18/2016	5/31/2016		Memorial Day: 5/30
2016	2	4	6/1/2016	6/14/2016		
2016	2	5	6/15/2016	6/28/2016		
2016	2	HIP	6/29/2016	7/12/2016	7/11-->7/12	4th of July: 7/4
2016	3	1	7/13/2016	7/26/2016		
2016	3	2	7/27/2016	8/9/2016		
2016	3	3	8/10/2016	8/23/2016		
2016	3	4	8/24/2016	9/6/2016		Labor Day 9/5
2016	3	5	9/7/2016	9/20/2016		
2016	3	HIP	9/21/2016	10/4/2016	10/3-->10/4	
2016	4	1	10/5/2016	10/18/2016		
2016	4	2	10/19/2016	11/1/2016		
2016	4	3	11/2/2016	11/15/2016		
2016	4	4	11/16/2016	11/29/2016		Thanksgiving 11/24 & 11/25
2016	4	5	11/30/2016	12/13/2016		
2016	4	6	12/14/2016	12/27/2016		Christmas Sunday, 12/25
2016	4	HIP	12/28/2016	1/10/2017	1/9-->1/10	New Years Day Sunday 1/1

So Let's Work Backwards...

- Quarterly planning – want to get sprint-by-sprint plan → report out to C-level
- HIP (Hardening/Innovation/Planning) – feed back on waterline (using proposed velocity)
- Grooming stories
 - Ready
 - Pointed
- Product Owner/Tech Lead write stories
- Stakeholders provide prioritized features.

Treat Planning like Sprints:

- Sprints 1 & 2 – Validate Themes and Epics
- Sprints 3 & 4 – Create Features
- Sprints 4 & 5 – PO and TL create stories
- Sprints 5 & HIP – Teams groom stories

Let's Do It

1. Create and Groom Features
2. Create Stories
3. Provide initial waterline to RTE
4. Report/Rework #1 – If initial waterlines do not match priorities
5. Day 1: Teams create their quarterly plan
6. Day 1: Report/Rework #2 – RT and stakeholders look at all teams' plans
7. Day 2: Report/Rework #3 – RTEs report out to other RTs and C-Level
8. Day 2: Finalize Plan

Let's Do It #1

Create and Groom Features

- Stakeholders create features (with acceptance criteria)
- Stakeholders prioritize features
- RTE creates Grooming Waterline (Problem of grooming too much)
- RTE assigns them to PO's; PO's assign to teams
- Teams assign Feature Shepherd.

Let's Do It #1 - Example

Stakeholders create features:

Product Feature 1	Architecture Feature 1	UI Feature 1
Product Feature 2	Architecture Feature 2	UI Feature 2
Product Feature 3	Architecture Feature 3	UI Feature 3
Product Feature 4	Architecture Feature 4	
Product Feature 5		

Stakeholders prioritize features:

<u>Prioritized Feature List</u>
Product Feature 1
Product Feature 2
Architecture Feature 1
UI Feature 1
Product Feature 3
Architecture Feature 2
UI Feature 2
Architecture Feature 3
Product Feature 4
Product Feature 5
UI Feature 3
Architecture Feature 4

Let's Do It #1 – Example (cont.)

RTE creates Grooming Waterline :

<u>Prioritized Feature List</u>
Product Feature 1
Product Feature 2
Architecture Feature 1
UI Feature 1
Product Feature 3
Architecture Feature 2
UI Feature 2
Architecture Feature 3
Product Feature 4
Product Feature 5
--- Grooming Waterline---
UI Feature 3
Architecture Feature 4

RTE assigns them to PO's; PO's assign to teams:

<u>Prioritized Feature List</u>		<u>Team</u>
Product Feature 1	P1	Alpha
Product Feature 2	P2	Beta
Architecture Feature 1	A1	Charlie
UI Feature 1	U1	Beta
Product Feature 3	P3	Alpha
Architecture Feature 2	A2	Beta
UI Feature 2	U2	Alpha
Architecture Feature 3	A3	Charlie
Product Feature 4	P4	Charlie
Product Feature 5	P5	Alpha

Let's Do It #2

Create Stories

- Product Owner along with Feature Shepherd and Tech Lead create stories to cover acceptance criteria in Feature
- For each story, team either:
 - Declares the story “Not Ready”
 - Points the story.

Let's Do It #2 - Example

Create and Point Stories

<u>Prioritized Feature List</u>		<u>Team</u>		<u>Points in the Feature</u>
Product Feature 1	P1	Alpha		30
Product Feature 2	P2	Beta		40
Architecture Feature 1	A1	Charlie		20
UI Feature 1	U1	Beta		40
Product Feature 3	P3	Alpha		15
Architecture Feature 2	A2	Beta		30
UI Feature 2	U2	Alpha		15
Architecture Feature 3	A3	Charlie		20
Product Feature 4	P4	Charlie		30
Product Feature 5	P5	Alpha		20
			Σ	260

Let's Do It #3

Provide initial waterline to RTE

- Create projected velocity (per sprint ?) for upcoming quarter
- Total up points within each feature (sum of points for all stories in the feature)
- Calculate how far down a team's feature backlog their velocity can handle.

Let's Do It #3 - Example

	Orig Points	QTR Velocity
Team Alpha	80	70
Team Beta	110	80
Team Charlie	70	90

For proposed quarterly velocity, you can use a uniform extension of historical velocity

Or....

	Sprint	Q4-S1	Q4-S2	Q4-S3	Q4-S4	Q4-S5	
	Start	10/21/2015	11/4/2015	11/18/2015	12/2/2015	12/16/2015	
	End	11/3/2015	11/17/2015	12/1/2015	12/15/2015	12/29/2015	
				Thanksgiving		Christmas	
	Work days in the sprint -->	9	9	7	9	8	
Octan							
	Allen			4 days			
	Dan	None					
	Ken	one week total - not consecutive					
	Mark				7 days	OUT all 8 days	
	Nancy	None					
	Sam					2 days	
	Octan Days Lost	0	0	4	7	10	
	Proposed Raw Velocity(/holiday effect)	18	18	16	18	17	
	<Vacation Decrease (proposed by Ben)>	0	0	2	3	4	
	ESCALATION ROTATION	-18	0	0	0	0	
Octan	Proposed Sprint-by-sprint velocity	0	18	14	15	13	60

Let's Do It #4

Report/Rework #1 – If initial waterlines do not match priorities

- This is done prior to the team creating their quarterly plan
- Features may be shifted to other teams
- Other teams must repoint those new stories
- Rinse and repeat.

Let's Do It #4 - Example

Report/Rework #1 – If initial waterlines do not match priorities

Prioritized Feature List		Team		Points in the Feature
Product Feature 1	P1	Alpha		30
Product Feature 2	P2	Beta		40
Architecture Feature 1	A1	Charlie		20
UI Feature 1	U1	Beta		40
Product Feature 3	P3	Alpha		15
Architecture Feature 2	A2	Beta		30
UI Feature 2	U2	Alpha		15
Architecture Feature 3	A3	Charlie		20
Product Feature 4	P4	Charlie		30
Product Feature 5	P5	Alpha		20
--- Grooming Waterline-----				
UI Feature 3				
Architecture Feature 4			Σ	260
		Orig Points		QTR Velocity
Team Alpha		80		70
Team Beta		110		80
Team Charlie		70		90

	Stories	Δ	Final Plan Points
Team Alpha	P1, P3, U2	-P5	60
Team Beta	P2, U1	-A2	80
Team Charlie	A1, A2, A3, P4	+A2	100
*** REMOVED ***	P5		20

Let's Do It: Time fo Finalize the Plan

Schedule: HIP Sprint

Sprint Day->	0	1	2	3	4	5	6	7	8	9
	Wednesday	Thursday	Friday	Monday	Tuesday	Wednesday	Thursday	Friday	Monday	Tuesday
Meetings	(Prior) Sprint Review	Hack-A-Thon	Hack-A-Thon	HIP sprint	HIP sprint	HIP sprint	HIP sprint Initial Waterline	HIP sprint	All RT Planning	All RT Planning
	HIP Sprint Discussion			Grooming	Grooming	Grooming		Re-grooming		

Finalizing the Quarterly Plan

Time	Quarterly Planning Day 1	Quarterly Planning Day 2
8:00 AM		
8:30 AM		
9:00 AM		RTE: Possible changes to plan
9:30 AM		Teams available to re-groom/re-plan
10:00 AM	All RT Kick-off/Context	Teams available to re-groom/re-plan
10:30 AM	All RT Kick-off/Context	Teams available to re-groom/re-plan
11:00 AM	All RT Kick-off/Context	Teams available to re-groom/re-plan
11:30 AM	Teams create Quarter's Plan	Teams available to re-groom/re-plan
12:00 PM	Teams create Quarter's Plan	Teams available to re-groom/re-plan
12:30 PM	Teams create Quarter's Plan	All RT Report "Final" plans
1:00 PM	Teams create Quarter's Plan	All RT Report "Final" plans
1:30 PM	Teams create Quarter's Plan	Leadership examines "final" plans
2:00 PM	RT Report out #1 - What's out	Teams available to re-groom/re-plan
2:30 PM	RT Report out #1 - What's out	Teams available to re-groom/re-plan
3:00 PM	Teams re-groom/re-plan	Teams available to re-groom/re-plan
3:30 PM	Teams re-groom/re-plan	Teams available to re-groom/re-plan
4:00 PM	Teams re-groom/re-plan	
4:30 PM	Teams re-groom/re-plan	
5:00 PM	RTE examines new plans	

Let's Do It #5

Day 1: Teams create their quarterly plan

- Assign stories to sprints
 - Look at planned velocity
 - Look at dependencies
- Report plan back to RT – highlighting what had been groomed but did not make it into the quarterly plan.

Let's Do It #6

Day 1: Report/Rework #2 – RT and stakeholders look at all teams' plans

- Reassign Features to teams to match priorities
- Teams re-groom and re-plan.

Let's Do It #7

Day 2: Report/Rework #3 – RTEs report out to other RTs and C-Level

- Reassign Features to teams to match priorities
- Teams re-groom and re-plan.

Let's Do It #8

Day 2: Finalize Plan
(and Adult Beverages)

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Wins

- Wins
 - Corporate and RT feature prioritization
 - Corporate and RT feature forecasting
 - Teams impact Program-level implementation plans.

Opportunities to Improve

- It is not a commitment, it's a plan
- Features get to teams too late
- Features not well-enough defined
- Groomed too much – RTE too optimistic
- Not enough time reserved in sprints to do Grooming
- RT and/or Company-wide priorities dictate last-minute features shifting teams
- Inter-RT dependencies.

QUESTIONS?