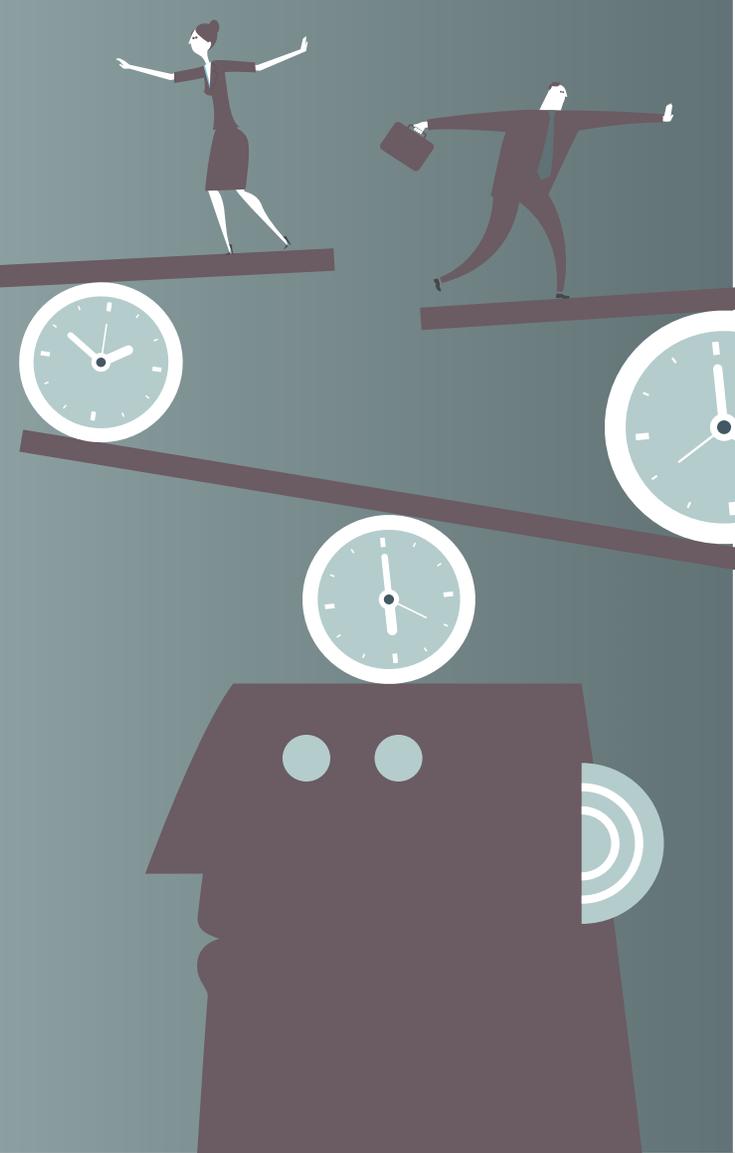




# WATERFALL TO AGILE



Making the Transition to Agile or  
a Mixed Methodology Approach

.....  
20 TOP EXPERTS SHARE THEIR SECRETS

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# FOREWORD

The days of the solitary Gantt chart are gone.

Today, most project leaders are asked to collaborate with stakeholders and executives across the business. That means managing multiple work methodologies and, in particular, combining traditional Waterfall project management with new Agile approaches. And that trend isn't slowing down: an internal survey of Workfront customers revealed that 44 percent primarily manage projects that require a mixture of Agile and Waterfall.

Although embracing an Agile approach for some projects can bring dramatic efficiency gains and a tighter focus on business performance goals, the transition to a mixed-methodology enterprise can be fraught with complications related to culture, metrics, and tools. Your team or business may be resistant to change or reluctant to embrace new jargon and practices associated with a new methodology. Translating metrics among more than one methodology can be chaotic, and signing into multiple tools—one for Waterfall and another for Agile—isn't efficient and simply wastes valuable time for your team and project stakeholders.

At Workfront, we've seen these challenges time and time again. It's why we created an Enterprise Work Management solution that allows both methodologies to work in harmony, without a lot of redundant, manual effort. Workfront offers project leaders and stakeholders a complete view of work from both Agile and Waterfall—true visibility into all types of work and all methodologies.

The expert advice captured in this eBook provides wisdom and suggestions for best practices you need to embrace Agile.



**Eric Morgan**  
Workfront CEO

# INTRODUCTION

One reality we all face in a world of accelerating business cycles is the need to respond more quickly to business demands. This has placed greater pressure on projects to deliver faster and more accurately than ever before. Many businesses are adopting more Agile project management strategies that tackle complex projects incrementally. Although there are compelling arguments for approaching complex projects in this way, many companies' experiences with Agile have ranged from difficult to disastrous.

With the generous support of Workfront, we have undertaken to learn more about the challenges of transitioning to Agile by posing the following question to 20 top project management and Agile experts:

## **What are some tips and secrets you can provide to project leaders and teams making the transition to Agile or transitioning to a mix of Agile and Waterfall? Please share a personal story.**

This excellent collection of essays reveals traps some managers fall into that derail their attempts at transitioning from Waterfall to Agile. The experts also highlight keys to success, an important one being the need for good communication within and across teams. One big take-away from these project management professionals is that becoming more Agile is a huge cultural transition that requires commitment at all levels within the business.

I believe that the insights that these experts provide will be of great interest and value to anyone trying to improve their project management processes.



All the best,  
David Rogelberg  
Editor



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These authoritative and diverse guides provide a full view of a topic. They help you explore, compare, and contrast a variety of viewpoints so that you can determine what will work best for you. Reading a Mighty Guide is kind of like having your own team of experts. Each heartfelt and sincere piece of advice in this guide sits right next to the contributor's name, biography, and links so that you can learn more about their work. This background information gives you the proper context for each expert's independent perspective.

Credible advice from top experts helps you make strong decisions. Strong decisions make you mighty.

# AGILE STATE OF MIND



**NAOMI CAIETTI,**  
**PMP**

Project Manager/Consultant,  
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Naomi Caietti is founder, CEO, and managing editor of The Glass Breakers.net. She has been a consultant, published author, and recognized expert on personal growth and leadership development for project, program, and portfolio managers for more than 10 years. With more than 27 years of public and private IT project leadership expertise, Naomi is a credentialed PMP and speaker on topics such as leadership, project management, and women in project management; one of the top influential PMPs on Twitter; and featured SME on ProjectManagement.com.



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Website



Blog

Are you wondering how to choose which project management method to use when delivering a successful project? Organizations today have to be more competitive in the marketplace, so choosing the best practices and methods for your organization and projects is important.

Here are four criteria for choosing the best fit of methodologies at the right time for the right customer:

- **Time-to-Market Projects.** Agile adoption has replaced Waterfall in many organizations for the delivery of small but frequent pieces of functionality for which requirements are expected to evolve, change is embraced, and competition in the marketplace is a key concern and critical to delivery of the latest technology.
- **Status Quo.** Waterfall is a better choice for organizations that are not flexible, have clearly defined requirements, frequent interactions with end users and other stakeholders is a constraint, or when there is risk of key developers quitting the project midway.
- **Success Criteria.** The success of a project defined by delivering business value will benefit from an Agile methodology. The success of a project measured by key performance indicators of the IT organization would be better suited to a Waterfall methodology.

“Agile adoption has replaced Waterfall for the delivery of small but frequent pieces of functionality for which requirements are expected to evolve and change is embraced.”

## KEY LESSONS

- 1 CHOOSE THE METHODOLOGY—AGILE, WATERFALL, OR HYBRID—FOR YOUR PROJECT BASED ON THE TYPE OF PROJECT AND ORGANIZATION.
- 2 SUCCESSFUL PROJECTS REQUIRE GREAT SPONSORS.



# AGILE STATE OF MIND



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- **Organizational Project Portfolio.** Organizations that have a diverse portfolio must be risk adverse but innovative, taking some risks to stay competitive. Choosing a hybrid approach to use a blend of methodologies facilitates the development of high-performing teams. Planning, requirements, and team communication are areas in which organizations are designing custom best practices and methodologies that fit their culture.

Here are three action items to help you get started:

- **Leadership Support.** All projects need great sponsors; buy-in from the business for implementing IT standards and methods; and support for product service delivery using a big bang approach to smaller, iterative delivery cycles.
- **Choose Your Methodology Wisely.** Make sure that your project team can adapt to the change, and lead using the right best-practices methodology or a hybrid approach.
- **Focus on Team Member Selection.** Resources on an Agile team can thrive by co-locating in common areas, or resources can struggle because of intense and constant interactions that may create stressful team dynamics.

Ultimately, a hybrid approach of traditional Waterfall and Agile practices may be your key to success. A hybrid approach can help an organization leverage talent and deliver business value early and often for your software development projects.



Make sure that your project team can adapt to the change.



# AGILE ADOPTION FOR THE REST OF US



**MAX WALKER**

MBA, PMP, CSM

Max Walker leads and coaches small project teams in a less formal project environment. He works on the assumption that he has hired the right people who come to work to do the right thing, so if something goes awry, it is probably because of the project structure or process. Refining the process or adopting a better process leaves room for the project team's creativity and passion to emerge. They usually know best!



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Adopting Agile practices need not be an all-or-nothing proposition. Agile believes in delivering small, incremental improvements frequently. I propose that, just as we do with Waterfall practices and tools, we can pick, mix, and match the right Agile tool to solve our project management problems. Introducing new practices incrementally allows us to improve our project performance with less disruption and more success.

When my team faced the problem of requirements that shifted frequently during the project, we realized that our stakeholders were actually doing Agile—figuring out the right answers as they went along. Instead of resisting those changes as in Waterfall, we needed to embrace them as in Agile. To do that, here are some of the Agile principles and practices that we adopted.

First, we still do up-front planning. We found that our leadership teams do not tolerate the Scrum approach of planning primarily at the sprint level. Luckily, the Project Management Institute's Agile-Certified Practitioner approach offers an up-front planning process that is in line with Agile principles. We set a directional road map, but we all acknowledge that it should, must, and will change during the project. This road map has been well received in our organization.

“ Just as we do with Waterfall practices and tools, we can pick, mix, and match the right Agile tool to solve our project management problems. ”

## KEY LESSONS

- 1 ENGAGE IN UP-FRONT PLANNING THAT INCLUDES THE DEVELOPERS WHO WILL BUILD THE SOLUTION.
- 2 MEET REGULARLY WITH THE TEAM AND STAKEHOLDERS.



# AGILE ADOPTION FOR THE REST OF US



**MAX WALKER**

MBA, PMP, CSM

Max Walker leads and coaches small project teams in a less formal project environment. He works on the assumption that he has hired the right people who come to work to do the right thing, so if something goes awry, it is probably because of the project structure or process. Refining the process or adopting a better process leaves room for the project team's creativity and passion to emerge. They usually know best!



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Second, our developers participate in the up-front planning. In this way, the people doing the planning are those who will build the solution. They hear requirements, clarify them, and offer alternatives and suggestions. Our Waterfall project manager scribes and asks for her own clarifications. Requirements and estimates have been much better with this approach.

Third, we meet regularly (usually weekly) with our stakeholders. We discuss status, but we also demonstrate new deliverables, refine our understanding of the next tasks we'll work on, and ask for new input from the stakeholders. We get constant affirmation or correction on product direction; stakeholders get the reassurance of progress. There are certainly more refined approaches to doing this, but this process seems to fit the "bearing capacity" for change in our team at the moment.

Going Agile is not an all-or-nothing proposition. The goal is better project performance. Your route to "better" may be different than ours, so mix and match the project management tools that will increase your success.

“

Going Agile is not an all-or-nothing proposition. The goal is better project performance.

”

# BUILD-MEASURE-LEARN: EMPLOYING AGILE WITH LEAN STARTUP



**HALA SALEH**

Founder, 27Sprints

Hala Saleh is founder of 27Sprints, an Agile and product management consulting firm that uses Agile, Lean Startup, and data-driven approaches to build successful products and teams. Hala is passionate about building great products and employing empirical, data-driven, and systematic approaches to product development and decision making. She is even more passionate about the process of experimentation involved in developing products that enable customer success.



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It's no secret that a transition to Agile requires a deep senior executive support to be successful. A transition to a mix of Agile and Waterfall methods is even more complex and requires an even deeper level of executive support, understanding, and tolerance.

How do you get there? How do you, as a project leader, help create the culture and environment required for a successful transition to Agile?

Let's be real: cultural change doesn't happen overnight. In reality, it can take months, even years to take hold, especially in larger organizations. In the absence of a quick fix to the cultural challenges that make an Agile transition challenging, I propose a strategy that borrows from a framework we've all heard of.

Anyone who hasn't been living under a rock for the past decade has at least heard of Lean Startup, a business and product development method proposed by Eric Ries. One of my hobbies is experimenting with applying Lean Startup principles to other areas of my life, including work:

- What if you applied the Lean Startup method to your Agile transition?
- What if you figured out a way to define the minimum implementation of Agile within your organization that will show real value to your stakeholders?

“ A transition to a mix of Agile and Waterfall methods is even more complex and requires an even deeper level of executive support, understanding, and tolerance. ”

## KEY LESSONS

- 1 WHEN BUILDING A PROOF OF CONCEPT, BE CAREFUL NOT TO CHOOSE A PROJECT THAT IS SO SMALL THAT NO REAL VALUE CAN BE DEMONSTRATED. YOU WANT YOUR CUSTOMER (SENIOR-LEVEL EXECUTIVES) TO CARE ABOUT THE SUCCESS OF YOUR PROJECT AND PAY ATTENTION TO YOUR RESULTS.
- 2 BY TRACKING AND ANALYZING THESE METRICS, YOU'RE MORE LIKELY TO FOLLOW THROUGH WITH IMPROVEMENTS NEEDED TO MAKE YOUR NEXT ITERATION OF IMPLEMENTING AN AGILE METHOD MORE SUCCESSFUL.

# BUILD-MEASURE-LEARN: EMPLOYING AGILE WITH LEAN STARTUP



**HALA SALEH**

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- What if you were able to run a small but impactful implementation of Agile with a team, measure the areas of success and failure, and then figure out how to improve and be even more successful the next time around?

Learning directly from the Lean Startup method, you can increase the chances of an Agile implementation's success by focusing on a few key concepts:

- **Minimum Viable Product.** In this case, the product is the project or initiative on which you choose to do a proof of concept with your Agile implementation. In this context, the concept of *minimum viable* should guide you to select a project that is *only* large enough to show success. Tips include:
  - Be careful not to choose a project that is so small that no real value can be demonstrated. You want your customer (senior-level executives) to care about the success of your project and pay attention to your results.
  - Be careful not to choose a project that is mission critical, is mired in a lot of organizational politics, or has too many interdepartmental or interteam dependencies.
- **Build-Measure-Learn.** The concept of build-measure-learn is the Lean Startup's counterpart to Agile's "inspect and adapt." Agile frameworks encourage a continuous inspect and adapt mindset, and this comes in the form of continuous feedback cycles, retrospectives, and continuous collaboration. The Lean Startup's build-measure-learn cycle provides a formalized structure for measuring an Agile implementation's success. In addition to using tools such as continuous feedback and retrospectives, you can measure metrics that can be used to show the success of this new method.

Track metrics that not only demonstrate success but highlight areas of improvement. By tracking and analyzing these metrics, you're more likely to follow through with improvements needed to make your next iteration of implementing an Agile method more successful.



Track metrics that not only demonstrate success but highlight areas of improvement.



# HIKING THE AGILE TRAIL



## TRES ROEDER

President, Roeder Consulting

Tres Roeder, PMP, is a recognized global expert on project management and organizational change. He is the author of two Amazon best sellers, *A Sixth Sense for Project Management* and *Managing Project Stakeholders*. Tres has been quoted by *The New York Times*, *The Wall Street Journal*, *MSN Money*, and others. He holds a bachelor of arts in economics from the University of Illinois and an MBA from the Kellogg Graduate School of Management at Northwestern University.



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### Make the Case for Change

People want to know why change is necessary and how it affects them. Many different project management methodologies exist—Agile, Waterfall, Prince2—each with unique benefits and detractors. Show the organization why the new methodology is best and how it will help them. Put the new methodology into context to make the change less daunting. Explain that although the project methodology is changing, the approach to managing interpersonal project relationships encompassed in *A Sixth Sense for Project Management* is not changing because it remains consistent across all project methodologies.

### Something Old, Something New

People are wired to better understand new concepts when those new ideas are mapped to familiar concepts. Draw parallels between the current way and the new way. For example, if you're transitioning from Waterfall to Scrum (one type of Agile), explain that a *Scrum meeting* is simply a *mini-initiating and planning session* (to borrow two terms from Waterfall). Explain that Scrum *sprints* are similar to *milestones* in Waterfall. Connecting old to new facilitates the neural pathways to change.

“People are wired to better understand new concepts when those new ideas are mapped to familiar concepts. Draw parallels between the current way and the new way.”

### KEY LESSONS

- 1 SHOW THE ORGANIZATION WHY THE NEW METHODOLOGY IS BEST AND HOW IT WILL HELP THEM. PUT THE NEW METHODOLOGY INTO CONTEXT TO MAKE THE CHANGE LESS DAUNTING.
- 2 DESIGN A ONE-PAGE ROAD MAP THAT SHOWS WHERE THE ORGANIZATION IS TODAY AND WHERE IT'S GOING.



# HIKING THE AGILE TRAIL



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### Demystify the Journey with a Road Map

Design a one-page road map that shows where the organization is today and where it's going. Implementing a new project methodology is like hiking a trail: picture yourself standing at a trailhead looking at the map. The map shows the main elements of the path. You need to cross a river, climb a mountain, and cross a valley. You don't know precisely how long it will take. You also don't know if you'll experience wild animals, fallen trees on the path, or other barriers to progress. When transitioning to a new project methodology, show people the hills and valleys, but explain that you can't predict all the obstacles that will pop up. Manage expectations in every transition team meeting by kicking off with the road map.

“

When transitioning to a new project methodology, show people the hills and valleys, but explain that you can't predict all the obstacles that will pop up.

”



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Dr. Edward Wallington is an advocate of professional project management and business analysis in the geospatial and management information sectors. He is a versatile and enthusiastic project manager with a deep interest and belief in the transfer of project management theory into operational application. Ed is a member of the Association for Project Management (APM), a committee member of the APM Programme Management Specialist Interest Group, and actively contributes to the PPM community.



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The ability to deliver a project has many variables, one of which is the development and delivery approach chosen. This choice is not project-type specific: it applies equally to development and delivery of software, policy, and guidance.

Different approaches are valid at different times and for different projects, so Waterfall is still commonly used, but Agile is increasingly relevant and applied. Don't fall into the trap of using a certain approach "just because everyone else is." Take into account the type of project, resources available, and stakeholder experience. One thing to be aware of is that when we say *Agile*, we need to define what type of Agile, such as Dynamic Systems Development Method and Scrum. Each has subtle differences that need to be clear.

I have found that Agile projects deliver better results, but I also recognize that effort is required to manage expectations, support those involved, and manage the process. The key for me is that end users are involved. And in my opinion, Agile allows them to engage better, feel part of the process, and achieve results faster, thereby securing buy-in and ongoing support.

“ Don't fall into the trap of using a certain approach “just because everyone else is.” Take into account the type of project, resources available, and stakeholder experience. ”

## KEY LESSONS

- 1** AGILE PROJECTS DELIVER BETTER RESULTS, BUT RECOGNIZE THAT EFFORT IS REQUIRED TO MANAGE EXPECTATIONS, SUPPORT THOSE INVOLVED, AND MANAGE THE PROCESS.
- 2** FOR AGILE TO WORK WELL, EVERYONE INVOLVED NEEDS TO UNDERSTAND THE PROCESS AND WHAT TO EXPECT AT EACH STAGE.





## ED WALLINGTON

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For Agile to work well, everyone involved needs to understand the process and what to expect at each stage. End users, sponsors, and team members need to know what they expect, what they have to do and when. They are not used to being engaged and involved in Agile projects, so it's key to spend time with all involved to help them understand the project approach, their role, and what's expected of them.

Agile is a flexible tool, and the ability to deliver incremental benefits matched to user requirements within a faster development and delivery timescale than other approaches is important. The quick cycles and stakeholder engagement allow the project to adapt quickly to changing requirements, meet stakeholder demands, and realize benefits quickly, demonstrating proactive project management and delivering a successful project.

No matter what project delivery approach you take, the key to success is making sure that all stakeholders know the approach, what to expect, and what their role is.



No matter what project delivery approach you take, the key to success is making sure that all stakeholders know the approach, what to expect, and what their role is.



# MORE AGILE THAN YESTERDAY: THE JOURNEY TO AGILE



## STEPHANIE DAVIS

Director of Agile Leadership,  
Cox Target Media/Valpak

As director of Agile Leadership at Valpak, Stephanie Davis is responsible for championing, overseeing, scaling, and measuring the Agile framework across the enterprise. She is a career project leader who has more than 17 years of experience. Stephanie maintains PMP, ACP, and CSM credentials, and she holds a bachelor of science degree in marketing and an MBA in international business. Stephanie is the organizer for Tampa Bay Agile and Agile Open Florida and serves on the board of the Agile Alliance.



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Blog

Remember that old rotisserie commercial from Ronco telling us to “set it and forget it”? I’m here to tell you, that’s *not* what you do with Agile. Agile is not an appliance to be set, but rather a massive shift in the culture of an organization, especially if done right. A successful Agile transformation requires continual feeding and nurturing if it is to be sustained. Valpak is three years into our Agile journey, and to sustain it, we have had to feed and nurture it each and every day. Notice my use of the word *journey*: Agile is indeed a never-ending journey, not a destination or a final end state. From the beginning of our Agile transformation, we have had an executive champion (our CIO, Chris Cate) and a leadership champion (that’s me) continually feeding and nurturing the change, not to mention the Agile coach (from AgileThought), who was involved over the first six months to help us through the early stages.

## KEY LESSONS

- 1 AGILE IS A JOURNEY THAT REQUIRES CONSTANT FEEDING AND NURTURING.
- 2 YOU KNOW THE CHANGE TO AGILE IS GOING WELL WHEN IT BECOMES LARGER THAN ONE PROJECT, ONE PERSON, OR THE FIRST TEAM.

“ Agile is not an appliance to be set, but rather a massive shift in the culture of an organization, especially if done right. ”



# MORE AGILE THAN YESTERDAY: THE JOURNEY TO AGILE



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Website



Blog

Agile is a culture change more than anything else, and culture change takes time—lots of time (I think I heard 10 years once). I remember Dean Leffingwell, father of the Scaled Agile Framework talking about how we will never truly be Agile, that we must simply strive to be more Agile than we were the day before. That’s exactly it!

So, how do you know you’re doing it right? My key performance indicator on this is simple: as you continue to nurture this change throughout your organization, you know you’re doing well when it becomes larger than that one project, that one person, that one champion, that first team. When you hear whispers of *sprints* and *value* and *minimal viable product* and see Kanban boards go up that you had nothing to do with, you can breathe a deep sigh of relief knowing that you’ve come so far. After you’ve exhaled that deep breath, get your eyes back on the road of your Agile journey and enjoy the ride.

“

Agile is a culture change more than anything else, and culture change takes time—lots of time.

”

# EMBRACING AGILE: ENSURING COHESION WITH TEAMS AND STAKEHOLDERS



## NEIL WALKER

Program & Project  
Practitioner, Parimaan Ltd

Neil Walker is a project management professional, consultant, and author. He has more than 20 years of experience leading and delivering multi-million-dollar business transformation programs that have aligned people, process, and technology with business strategy for numerous blue-chip organizations. He has consulted (in advisory and delivery capacities) across Europe and North America in such specializations as strategic collaboration, delivery assurance, and turnaround of programs and projects.



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Website



Blog

You're venturing into the world of Agile. Embrace it: it is certainly a worthwhile endeavor. Crossing this threshold can be both exhilarating and unsettling, often requiring an uncomfortable but necessary shift in mindset (skills, beliefs, habits).

In 1992, I was an application development lead for a multinational bank. In response to growing demand from the business for swifter project life cycles and earlier delivery of benefits, I was tasked with exploiting rapid application development techniques to work more intimately with our customers. Adopting this Agile approach was a steep learning curve, but it resulted in successful delivery of multiple projects in timeframes previously thought impossible.

Subsequently, I've led numerous Agile projects, embracing many popular methods, including Agile Unified Process, the Dynamic Systems Development Method, eXtreme Programming, and Scrum. I've even exploited Agile to drive transformation in business change programs, resulting in significantly shortened release cycles.

After 20 years, I have experienced some resounding successes with Agile. On occasion, however, an Agile approach has resulted in projects struggling to deliver (certainly more than delivering via Waterfall). Be selective: make sure Agile is fit for your purpose.

The most common reason Agile projects fail is the people involved—or not involved—as the case may be!

“The most common reason Agile projects fail is the people involved—or not involved—as the case may be!”



## KEY LESSONS

- 1 EFFECTIVE PARTICIPATION AND CONTRIBUTIONS ARE REQUIRED FROM EVERY PARTICIPANT.
- 2 IT'S IMPERATIVE THAT STAKEHOLDERS EMBRACE THE AGILE APPROACH WITH FULL CONVICTION, PROVIDING ACTIVE SUPPORT THROUGHOUT THE LIFE CYCLE OF THE PROJECT.

# EMBRACING AGILE: ENSURING COHESION WITH TEAMS AND STAKEHOLDERS



## NEIL WALKER

Program & Project  
Practitioner, Parimaan Ltd

Neil Walker is a project management professional, consultant, and author. He has more than 20 years of experience leading and delivering multi-million-dollar business transformation programs that have aligned people, process, and technology with business strategy for numerous blue-chip organizations. He has consulted (in advisory and delivery capacities) across Europe and North America in such specializations as strategic collaboration, delivery assurance, and turnaround of programs and projects.



Twitter



Website



Blog

Effective participation and contributions are required from every participant. This collaborative culture must be adopted by all involved (executives, leadership, management, business areas, delivery team). Drive this necessary commitment, or you'll face avoidable disruption and sluggish progress and risk failure.

Everyone on the team must fully understand and appreciate the key issues facing the team. Communicate effectively with one another, and address and overcome issues rapidly. Foster team cohesion, and expect higher levels of efficiency and effectiveness.

Stakeholders play a crucial role, too. It's imperative that they embrace the Agile approach with full conviction, providing active support throughout the life cycle of the project. At the very least, get them to sit in on the daily stand-up meetings (they will benefit from such early visibility).

In the end, you must embrace the Agile culture, but select well—not only the project to be tackled with Agile but the team, too—and ensure that the common objective is driven fervently from the top down. In addition, ensure that the necessary environment and resources are provided for success. Finally, make sure your people feel that their good work is rewarded, and above all, have fun.



Make sure your people feel that their good work is rewarded, and above all, have fun.



# SMOOTH TEAM TRANSITIONS TO AGILE PROCESSES



**SOMA  
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Soma Bhattacharya is an Agile consultant who works with clients undergoing transformation at the team and organization levels. When not at her job, she spends time on her blog and loves to explore new ideas, write books, and give back to the community that has given her so much.

 |   
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Transformation can happen in two ways for any organization or team. You can go for the drastic changes from day one and make it mandatory for everyone to follow the rules, or you can make the changes gradually over time and give everyone time to adapt to them. I prefer that the transformation happen gradually, because it means that everyone gets the time to understand the benefits and what's expected of them.

Here are a few points to help ensure a smooth transition:

- **Share Success Stories.** Create boards that are visible to all and share teams' success stories. This allows recognition of successful teams within the organization, and other teams can see what the transformation is bringing for them.
- **Create Forums.** Creating forums where everyone can openly discuss problems and share knowledge encourages the Agile culture. You can create multiple forums and even invite management or guests, but I prefer that the group get comfortable before bringing new people into it.
- **Enable Recognition.** Allow team members to recognize each other through retrospectives or simply by allowing them to write sticky notes and place them on someone's desk. Team members are happy to receive these messages, making them more likely to write them for others.

## KEY LESSONS

- 1 **ENCOURAGE TEAM MEMBERS TO SHARE THEIR SUCCESSES AND FAILURES WITH TEAMMATES.**
- 2 **INVOLVE MANAGEMENT FROM THE BEGINNING AND ENCOURAGE THEIR OPINIONS TO MORE EASILY GAIN BUY-IN.**

“ You can go for the drastic changes from day one and make it mandatory for everyone to follow the rules, or you can make the changes gradually over time and give everyone time to adapt to them. ”



# SMOOTH TEAM TRANSITIONS TO AGILE PROCESSES



**SOMA  
BHATTACHARYA**

Agile Transformation  
Consultant, Xebia IT  
Architects India Private Limited

Soma Bhattacharya is an Agile consultant who works with clients undergoing transformation at the team and organization levels. When not at her job, she spends time on her blog and loves to explore new ideas, write books, and give back to the community that has given her so much.



Twitter | Website



- **Train Everyone, Especially Managers.** With Agile coming in, managers feel that there's no need for them and so sometimes oppose the change. The truth is, there's always a need for anyone who can encourage the team and help remove impediments. Training the management team helps to make the transformation much easier. Involve management from the beginning, and ask for their opinion. You'll get easier buy-in.
- **Don't Compare Teams or Roles.** Every team is unique, so comparing team Velocity or Scrum masters always breeds bad blood. Instead, keep teams separate, don't share reports that compare one with another, and encourage collaboration between teams.
- **Be Transparent.** Being transparent means that you have to be open about failures as well as successes. When something doesn't work, admit it. Bringing in everyone to find a solution is a better way to create unity in the team than hiding the failures.
- **Time Is Your Friend.** With every sprint, things improve; change doesn't happen in a day. Learn from every sprint, and see the changes you can bring in. Try different ways to improve the team, and always remember that not one show fits all.



Being transparent means that you have to be open about failures as well as successes. When something doesn't work, admit it.



# FACILITATING A SMOOTH TRANSITION TO AGILE



## SAVERIO LOSITO

Senior Program Manager,  
Santer Reply SpA

Saverio Losito, PMP and Prince2 certified, is a senior program manager who has more than 18 years of experience leading and delivering technology-enablement projects and change management programs. He's a seasoned project management instructor and coach and an advocate of process improvement, technology innovation, knowledge-sharing techniques, and how businesses can capitalize on social media integration. Saverio maintains a project management blog, a virtual place to help young professionals grow with the advice of seasoned professionals.



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At first sight, it seems easy to transition an organization to Agile, but don't underestimate the strength of resistance you may encounter. Most people work in a traditional (i.e., Waterfall) environment, so there may be a fear of the unknown and a compulsion to stick with what people know.

You often hear people in the business saying, "I know perfectly well the way we do things around here; your way of doing things is wrong." Even when there's clear evidence that those assumptions are incorrect, employees will still make excuses to justify them.

I have come across organizations that claimed that they had tried to use Agile but it didn't work for them; indeed, their project managers kept running traditional Waterfall projects but called them Agile projects. Of course, transitioning to Agile is more than the terms we use to refer to our projects.

With that in mind, here's a bit of advice for facilitating a smooth transition to Agile:

- *Agile* doesn't mean "do more for less." It isn't the solution for saving money (as many organizations think).
- Like any other change management strategy, transition to Agile needs strong leadership support. From top management to middle management, every stakeholder must be committed to this goal; otherwise, disaster lurks around the corner.

“ Transitioning to Agile is more than the terms we use to refer to our projects. ”

## KEY LESSONS

- 1 **TRANSITION TO AGILE REQUIRES STRONG LEADERSHIP. EVERY STAKEHOLDER MUST BE COMMITTED TO THE GOAL.**
- 2 **FOR AGILE TO SUCCEED, YOU MUST BUILD A CULTURE OF TRUST AND RESPECT AMONG PARTIES.**



# FACILITATING A SMOOTH TRANSITION TO AGILE



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- Affirmations like “I can’t control the budget,” or “There aren’t a number of acceptable gates and decision points” are only barriers to the transition. “The unknown” is what we fear more, and Agile represents the unknown here.
- Some organizations send their project managers to a Scrum course, expecting a miracle when they come back. Transition to Agile needs training, but getting an Agile project manager alone—without getting Agile-experienced team members and building a suitable environment—won’t bring in the expected result.
- Agile is focused on delivering value, but organizations are usually focused on what things cost, not on what generates the greatest value. Changing that view is the really difficult bit.
- Agile is made up of 12 principles, a set of guiding concepts that support project teams in implementing Agile projects. Agile is not a process: that’s where Scrum comes in. Scrum is a process based on the 12 principles of Agile. Many people start adapting Scrum methods without understanding the principles at its base; the result is inevitably “Water-Scrum-fall.” The best you’ll achieve is mini-Waterfall; at worst, you get suboptimal Waterfall.
- Agile principles are based on building a culture of trust and respect among parties.
- Although it’s not impossible to implement Agile in a virtual team (I know people doing it), it’s definitely smoother to adopt Agile when you have a team made up of co-located participants.
- Your Agile team needs to be cohesive; some project teams are set up and disbanded so quickly that they never get past the storming phase.

“

The move to Agile is simple: start doing Agile. It's also extremely difficult: stop doing projects.

”

The move to Agile is simple: start doing Agile. It's also extremely difficult: stop doing projects.



## BOB HARTMAN

Certified Scrum Trainer and  
Coach, Agile For All

Bob Hartman, known as *Agile Bob*, has been involved in the software industry for more than 30 years. He uses his experience to help organizations, teams, and individuals all around the world. Bob is a popular conference speaker, a certified Scrum trainer and certified Scrum coach, and assistant chairman of the Scrum Alliance Board of Directors.



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When transitioning to Agile, especially from a Waterfall environment, it's important to recognize the bad habits you have to overcome. Too many organizations have long held beliefs about their way of doing things that lead them to believe that some changes are impossible. This thinking leads to less-than-optimal results when transforming to an Agile culture. Such assumptions are harmful in several areas, but the biggest one is the belief that a company has large projects and therefore needs a lot of people to work on each project. To avoid this trap, I try to keep companies focused on two simple concepts, both of which are difficult to do but deliver huge benefits.

First, think about how to “unscale” rather than thinking large. Figure out ways to keep projects small so that two or three teams, each with five to nine people, can complete the work. This structure often leads to faster results; in one recent case, it also made it clear to a stakeholder that work he felt was important was actually not valuable enough to start. According to the Standish Group, “It is very clear that reducing scope and breaking up large projects into smaller ones are difficult tasks. However, the rewards and benefits are quickly evident when the organization starts to receive value early in the project cycle.”

“ Too many organizations have long held beliefs about their way of doing things that lead them to believe that some changes are impossible. This thinking leads to less-than-optimal results when transforming to an Agile culture. ”

## KEY LESSONS

- 1 FIGURE OUT WAYS TO KEEP PROJECTS SMALL SO THAT TWO OR THREE TEAMS, EACH WITH FIVE TO NINE PEOPLE, CAN COMPLETE THE WORK.
- 2 FOCUS ON BUILDING A NETWORK OF TEAMS RATHER THAN A HIERARCHY OF ROLES.





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Second, focus on building a network of teams rather than a hierarchy of roles. In other words, create a system of teams working together to deliver value by collaborating rather than receiving direction from a hierarchy of people who have certain titles. Give the teams a framework for accomplishing their mission, and then let them go accomplish it! Geonetric has taken this practice to the extreme, flattening the organizational structure entirely. The result? Everyone is on a Scrum team delivering value. Every person on every team understands how his or her results help drive the overall financial results of the company. There is a direct tie-in from team and project results to organizational results. The network of teams works together to increase the value of their products and their company without people having to tell them what to do at each step along the way.

As the *CHAOS Manifesto 2013* from the Standish Group says, “Think Big, Act Small” for the best results.



Create a system of teams working together to deliver value by collaborating rather than receiving direction from a hierarchy of people who have certain titles. Give the teams a framework for accomplishing their mission, and then let them go accomplish it!



# EASING YOUR TRANSITION TO AGILE



## JOHANNA ROTHMAN

President,  
Rothman Consulting Group, Inc.

Johanna Rothman, known as the *Pragmatic Manager*, provides frank advice to your tough problems. She helps organizational leaders recognize potential risks, seize opportunities, and remove impediments.

Johanna is the author of eight books (with more in progress) and more than 300 articles. She writes two blogs on her website, [jrothman.com](http://jrothman.com), as well as a blog on [createadaptablelife.com](http://createadaptablelife.com). Contact Johanna at [jr@jrothman.com](mailto:jr@jrothman.com).



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I worked with Danny, a client who wanted to transition to Agile because he thought he would stop the multitasking, deliver products the customers wanted, and create a better environment for his teams. He thought the transparency would be great, too.

Danny got all that. What surprised him was how much transparency there was in the projects.

When Danny invited people to experiment—to try something, measure the results, and make decisions based on those measurements and reflection—magic occurred. The teams discovered that they required significant technical practices. Just using iterations and limiting their work in progress wasn't enough, although they needed to do that. They needed automated tests. They needed continuous integration. They needed to work together, to pair and swarm. The team members needed the technical practices, not just the management practices of Agile.

The product owners realized that estimating stories wasn't the panacea they had hoped it would be. The product owners had all the control—they were in charge of when the project would be complete. But until the product owners created road maps and made the stories smaller—working with the teams, not dictating to them—the product owners didn't get the results they wanted. That required experiments, too.

“The team members needed the technical practices, not just the management practices of Agile.”

## KEY LESSONS

- 1 INVITE CHANGE—DON'T MANDATE IT.
- 2 DON'T TELL PEOPLE HOW TO MANAGE THEIR PROJECTS. INSTEAD, USE A FEEDBACK-BASED APPROACH TO CHANGE.



# EASING YOUR TRANSITION TO AGILE



**JOHANNA  
ROTHMAN**

President,  
Rothman Consulting Group, Inc.

Johanna Rothman, known as the *Pragmatic Manager*, provides frank advice to your toughest problems. She helps organizational leaders recognize potential risks, seize opportunities, and remove impediments. Johanna is the author of eight books (with more in progress) and more than 300 articles. She writes two blogs on her website, [jrothman.com](http://jrothman.com), as well as a blog on [createadaptablelife.com](http://createadaptablelife.com). Contact Johanna at [jr@jrothman.com](mailto:jr@jrothman.com).



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And the project managers? They needed to experiment with how to manage programs and geographically distributed teams. What the project managers did, whom they worked with, and how they worked changed. Everyone changed over time.

Danny didn't mandate changes. He invited change. He used a feedback-based approach to change. He didn't tell people how to manage their projects. In return, the business results were great and so was the transition to Agile.

Agile isn't for everyone. It's not a silver bullet. In fact, there is no one way to approach your transition to Agile. If you experiment with the move to Agile, starting with your business reasons for it and using feedback to ensure that you're on the right track, you too can ease your transition.



If you experiment with the move to Agile, starting with your business reasons for it and using feedback to ensure that you're on the right track, you too can ease your transition.



# THINKING AGILE: TRANSFORMING YOUR ORGANIZATION'S MINDSET



## ROBERT KELLY

Managing Partner,  
Kelly Project Solutions, LLC.

Robert Kelly is a managing partner at Kelly Project Solutions, having successfully led complex, global projects for 15 years and with a portfolio that spans new product development, software development, and sales and marketing initiatives. Robert is a sought-after industry leader for speaking events, interviews, and blog contributions and has been featured in the Project Management Institutes' magazine, *PMNetwork* and Fast Company's 30-Second MBA. A featured speaker at the Triangle Technical Recruiters Association, Robert is the co-founder of #PMChat, a global Twitter community of project managers and business leaders.



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The greatest challenge to moving a team from Waterfall to Agile is the team's mindset. It isn't just about smaller iterations and deliverables, but rather an actual mental shift in how you view the team's approach to work. Here are a few things to consider as you lead your team down this new path:

- **Project Managers.** You aren't in the driver's seat telling people what to do. Your new role, often called *Scrum Master*, is one of facilitator and supporter to the team. You don't ask, "When will you have it done," but rather, "What can I do to help?"
- **Meetings.** No one likes meetings, and the idea of daily standups, storyboarding, and retrospectives won't help your case, but when the team realizes that these meetings have a purpose and won't "cross-pollinate," they will come to respect the purpose of each one. Instead of some catchall weekly get-together, these meetings take on a sense of purpose and accomplishment.
- **Agile Is Faster, But Not Instant.** Agile takes some time to hit a groove, so commitment from the team and management is key. You will not get it right on the first project. In fact, it may take three or four projects to get it right. Don't give up on the transition.

“The greatest challenge to moving a team from Waterfall to Agile is the team's mindset. It isn't just about smaller iterations and deliverables, but rather an actual mental shift in how you view the team's approach to work.”



## KEY LESSONS

- 1 **IMPLEMENT SLOWLY. DON'T TRY TO CUT OVER THE ENTIRE PROJECT MANAGEMENT ORGANIZATION AT ONCE.**
- 2 **ALTHOUGH IT MAY SEEM THAT MORE MEETINGS TAKE PLACE WITH AGILE, THEY WILL ACTUALLY BE LIBERATING. A DAILY GATHERING GETS THE TEAM TOGETHER AND REMOVES THE NEED FOR RANDOM STATUS UPDATE REQUESTS.**

# THINKING AGILE: TRANSFORMING YOUR ORGANIZATION'S MINDSET



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So, how do you get it right?

**Implement Slowly.** Don't try to cut over the entire project management organization at once. Pick a team and a low-risk project that can handle the new, uncomfortable world. Let that same team run another project, eventually bringing on additional teams.

**Clearly Discuss Roles and Responsibilities.** Your developers will gain a tremendous amount of latitude in this new world. They need to be ready to step up and understand that they get to select the tasks they want to work on; they get to drive the development plan. This is much different than "catching" requirements and working to assigned dates. In addition, project managers need to be reminded that they don't set the road map: they enable the team and remove roadblocks.

**Embrace Meetings.** No one enjoys the stale, hour-long weekly status meetings or being interrupted during the day for an emergency meeting. Although it may seem that more meetings take place with Agile, they will actually be liberating. A daily gathering gets the team together and removes the need for random status update requests. Retrospectives gather actionable, real-time improvements that are implemented immediately rather than being archived in some black hole.

Agile is different: it requires a conscious effort to embrace change. Don't try to modify it—trust it and let it run. After you work through a few cycles, I'm confident you'll be satisfied with the approach.

“

Agile is different: it requires a conscious effort to embrace change. Don't try to modify it—trust it and let it run.

”



## PETER TAYLOR

Owner/Director,  
The Lazy Project Manager Ltd.

Peter Taylor is the author of two best-selling books on “productive laziness”: *The Lazy Winner* and *The Lazy Project Manager*. In the past four years, he has focused on writing and lecturing, chalking up more than 200 presentations around the world in more than 20 countries, and has been described as “perhaps the most entertaining and inspiring speaker in the project management world today.” Peter also acts as an independent consultant, working with some of the major organizations in the world, coaching executive sponsors, project management office leaders, and project managers.



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Blog

More and more organizations are adopting Agile delivery methods with a view to delivering change faster, more effectively, and at a lower cost. As a result, there is a war of words and opinions between the camps of the *Agile* and, for want of a better word, *traditionalists* (absolutely no offense intended). I also acknowledge and personally recognize the world of the *hybrid*, as I am from the software industry.

But this is not the place to continue the arguments. Instead, note that some organizations are progressing to a more Agile world, not by engaging in fixed point-in-time assessments of their project health, but by running smaller, lighter, simpler health assessments at shorter intervals and reacting accordingly, with perhaps lighter touches of the project steering wheel.

To continue this analogy, there are two ways to drive around a corner in your car: two or three jerky, sharp turns of the wheel to make significant directional changes that bring you out the other side (perhaps with looks of annoyance from any passengers on board) or the “regular way,” which is made up of many small adjustments to the steering wheel that deliver a smoother transition in direction (and generally happier passengers).

“Some organizations are progressing to a more Agile world, not by engaging in fixed point-in-time assessments of their project health, but by running smaller, lighter, simpler health assessments at shorter intervals and reacting accordingly.”

## KEY LESSONS

- 1 INCORPORATE DYNAMIC REVIEWS THROUGHOUT THE PROJECT, NOT JUST WHEN THINGS FAIL OR THE PROJECT IS COMPLETE.
- 2 USE THESE MEETINGS NOT JUST TO REVIEW THE PROJECT AND ITS MILESTONES BUT ALSO TO REPAIR ANY RELATIONSHIPS AMONG TEAM MEMBERS.





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Similarly, Agile projects use reviews and dynamic retrospectives during the life of the project rather than at the end (or after some significant failure). For example, the Scrum method has a sprint review meeting that incorporates a form of retrospective. Types of Agile reviews include:

- The “heartbeat” or “pulse” within the iteration cycle of the project;
- Milestone after a major release, within a periodic cycle, or at the end of a project “phase” (or at any formal “quality gate”); and
- Custom review in response to a specific trigger (typically, a significant issue).

As with other traditional reviews, the purposes of the Agile reviews are:

- Learning from recent experiences and making improvements;
- Ensuring that there is a collective understanding of what happened (and why);
- New insight added to the project wisdom foundation;
- Repairing any damage to a project team (relationships, disengagements, disagreements, etc.); and
- Acknowledgment and appreciation of accomplishments.

Begin your gradual journey toward Agile by implementing these relatively simple health assessments. Combined with dynamic reviews, you’ll be better able to learn from your project and milestone experiences and pay that wisdom forward in your increasingly Agile projects.



Agile projects use reviews and dynamic retrospectives during the life of the project rather than at the end.



# BUILDING BETTER TEAMS THROUGH SCRUM



**SARA BROCA**

Consultant

Sara Broca is a project management and quality consultant in several domains, including the railway industry, aeronautics, web, and services. With no technical background, she tries to apply better Agile and project management with a quality management point of view.



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I heard about Scrum for the first time from collaborators on a software team at a previous job. I liked the concept from the beginning, so I did some research on the subject, joined an association specializing in the field, and am always looking for feedback from those who have experience with the subject.

A colleague and I tried to introduce people to the method, but it didn't work. People were resistant because they did not see how we could adapt it to our world.

I tried to put in place daily scrums with a small team on a traditional project to improve communication, hoping to introduce them to the concept of Scrum without using its name. As always, there were positives and negatives.

The positive points were the proximity between the project manager and the team. Decision making was fast, and outstanding tasks were immediately visible. The negative points were the inability to build a backlog, the absence of a product owner, and the difficulty of implementing user stories.

“ People were resistant because they did not see how we could adapt Scrum to our world. ”

## KEY LESSONS

- 1 IMPLEMENT DAILY SCRUM MEETINGS TO IMPROVE COMMUNICATIONS WITHIN AND OUTSIDE THE TEAM.
- 2 EVEN IF YOU CAN'T CHOOSE YOUR TEAM MEMBERS, TRY TO MAKE YOUR TEAM A GOOD ONE.



# BUILDING BETTER TEAMS THROUGH SCRUM



**SARA BROCA**

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Sara Broca is a project management and quality consultant in several domains, including the railway industry, aeronautics, web, and services. With no technical background, she tries to apply better Agile and project management with a quality management point of view.



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What this experience really drove home to me is, following its partial implementation and meetings with Scrum experts, Scrum provides a toolkit that managers can use to communicate better and provide feedback that teams can use to solve problems.

With more experience, I've discovered the main goal for succeeding with Agile or Waterfall methodologies: focus on building a good team. Even if you can't choose your team members, try to make your team a good one. Listen to the team members' issues, and try to find an answer in your project management method.

“

The main goal for succeeding with Agile or Waterfall methodologies is to focus on building a good team.

”

# GOOD PROJECT MANAGEMENT: ALWAYS APPROPRIATE, ALWAYS IN STYLE



## MARGARET MELONI

Champion of Project Managers,  
Meloni Coaching Solutions, Inc.

Meloni Coaching Solutions, Inc.

Margaret Meloni, MBA, PMP, is president of Meloni Coaching Solutions, Inc., a company devoted to helping you successfully navigate the human side of the project world. Her background in IT project management and PMO leadership enables Margaret to understand the challenges you face in managing projects. A recipient of the University of California, Los Angeles, Extension Distinguished Instructors award, her wish is to see her students take on tough projects and emerge as strong and sought-after project managers.



Twitter



Website



Blog

“We don’t need to trouble you with a request for a project manager; we are using an iterative approach, and project management cannot be used.”

You could have heard a pin drop. One of our technology managers had basically said, “Thanks but no thanks,” and he was saying it to the Project Management Office (PMO) director. Without batting an eye, the director asked for a description of this iterative process. In fact, he said he wanted to learn about it because if we had a whole team of project managers who were no longer needed? Well, we could redeploy them elsewhere. Why would we pay for a team of people who were not needed and did not add value?

Blithely unaware of the trap he had just set for himself, the technology manager described how every iteration was a mini-project of its own and how each mini-project would accomplish a small part of the project. Future iterations would build on the previous iterations. It was faster and more efficient and would provide better quality. It was too soon to know how many iterations would be needed or what would be accomplished in each iteration, but definitely the cost, schedule, scope, and quality goals would be met.

“We don't need to trouble you with a request for a project manager; we are using an iterative approach, and project management cannot be used.’ You could have heard a pin drop.”



## KEY LESSONS

- 1** USE THE APPROACH—AGILE, WATERFALL, SCRUM—THAT BEST FITS THE NATURE OF YOUR PROJECT.
- 2** THE IDEAL PROJECT MANAGER BALANCES THE STRENGTHS OF THE ITERATIVE APPROACH WITH THOSE OF PROJECT MANAGEMENT.

# GOOD PROJECT MANAGEMENT: ALWAYS APPROPRIATE, ALWAYS IN STYLE



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You probably know how this ends. This particular project floundered. Cost and schedule targets changed quite a few times. The vice president stepped in and stated that this project could not continue without a project manager.

The point is *not* that iterative approaches don't work: of course they work. This is not about trying to show that a Waterfall approach is better. The best approach is the approach that fits the nature of your projects and allows you to deliver a quality result within the desired budget by a specified date.

The result...the beginning of a stronger relationship between the PMO and the technology team. Any project manager could not have saved this project. The project manager who helped steer this project to success came with experience in iterative methodologies. He was hired from the outside and interviewed and selected by both the technology manager and the PMO director. He knew how to balance the strengths of the iterative approach with the strengths of project management. The result was a showcase project—an example for future projects and the beginning of a stronger relationship between the PMO and the technology team.



Good project management is like the classic little black dress: it's always appropriate and always in style.



# TOP 5 TRAINER'S TIPS FOR "SELLING" AGILE TO WATERFALL PMS



## JEFF FURMAN, PMP

Project Management  
Instructor and PM Book  
Author, NYU School of  
Professional Studies and  
Management Concepts Press

Jeff Furman, PMP, is an experienced IT project manager and project management instructor. He has managed many software projects for Fortune 100 firms in New York City, including new product evaluations and infrastructure upgrades. He currently teaches six project management courses for New York University's (NYU) School of Professional Studies, including two courses that he developed for NYU's Certificate In Project Management program. The second edition of his book, *The Project Management Answer Book*, includes a robust new chapter on Scrum.



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When teaching Waterfall project management in my basic project management and project management professional prep classes, I find that it helps to mix in a little Scrum information. My Waterfall students love getting a taste of Agile because they know it's a marketable and upcoming skill, and this helps reinforce some of the key concepts that started in Waterfall but are now part of Scrum.

Here are my top five ways of showing Waterfall and Scrum people that "we're not so different, you and I":

**1. Rolling Wave Planning.** In my classes, I show how Scrum's two-week sprint uses rolling wave planning, a technique that originated in Waterfall and is still key in the Project Management Body of Knowledge version five.

**2. Validate Scope Process.** I elaborate on point one by showing my students how the turnover of deliverables to the customer for approval after each Scrum sprint parallels the Project Management Institute's (PMI) Validate Scope process, which Waterfall project managers are encouraged to perform frequently on projects. This gives their customers many opportunities throughout the project life cycle to compare the deliverables they are receiving against the scope they requested and to make sure everything is in sync.

“ My Waterfall students love getting a taste of Agile because they know it's a marketable and upcoming skill, and this helps reinforce some of the key concepts that started in Waterfall but are now part of Scrum. ”



## KEY LESSONS

- 1** SCRUM AGILE'S TWO-WEEK SPRINT USES ROLLING WAVE PLANNING, WHICH ORIGINATED IN WATERFALL.
- 2** INCORPORATE THE CONCEPT OF KAIZEN—CONTINUOUS, SMALL IMPROVEMENTS.

# TOP 5 TRAINER'S TIPS FOR "SELLING" AGILE TO WATERFALL PMS



## JEFF FURMAN, PMP

Project Management  
Instructor and PM Book  
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**3. Retrospective and Lessons Learned.** I present the retrospective concept from Scrum in my Waterfall classes as an elaboration on the concept of lessons learned, which is core to Waterfall.

**4. Kaizen.** I elaborate on point three by tying the frequent retrospectives from Scrum to the concept of *Kaizen* (the goal of continuous, small improvements), which is central to PMI's Quality Management knowledge area.

**5. Waterfall and Agile Seminars.** I send out blog posts to my students to inform them about upcoming Agile and Waterfall seminars in the local New York City (NYC) area. For example, there are monthly meetings hosted by PMI's NYC chapter as well as NYC Scrum, Agile NYC, and the NY Software Process Improvement Network. Many of these seminars are of equal interest to Waterfall and Agile people, especially those about the "crossover" between the two methodologies. All are excellent for networking for both Waterfall and Agile project managers.



I present the retrospective concept from Scrum in my Waterfall classes as an elaboration on the concept of lessons learned, which is core to Waterfall.



# TRANSITIONING TO AGILE WITHOUT FEAR



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Susanne Madsen is an internationally recognized project leadership coach, speaker, and consultant. She is the author of *The Project Management Coaching Workbook* and *The Power of Project Leadership* (January 2015). Prior to setting up her own business, Susanne worked for 17 years in the corporate sector leading large change programs of up to \$30 million for organizations such as Standard Bank, Citigroup, and JPMorgan Chase. Today, she specializes in transforming project managers into leaders.



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People have a tendency to be skeptical if you tell them that their working practices are going to change, especially if they are unsure how the changes will affect them. People are skeptical—even resistant—because they believe they will lose something of value (status, belonging, competence) or because they fear they will not be able to adapt to the new ways. It is a big part of human behavior to hold onto the status quo: after all, it's a safe port. We know what we *have*, but we don't know what we will *get*.

The same is true when managers attempt to implement Agile practices into organizations that are used to working in a Waterfall fashion. If they attempt to make the change too quickly and without properly explaining, listening to, and engaging the team, the initiative will fall flat on its face. The biggest secret in making the transition to Agile isn't in the technicalities of the new process, but in “how” the change initiative is approached. Leaders and managers must be clear in their communication around how the change will affect each team member and what the benefits are. It is by building trust and removing doubt and fear that resistance disappears.

“ People are skeptical—even resistant—to change because they believe they will lose something of value (status, belonging, competence) or because they fear they will not be able to adapt to the new ways. ”

## KEY LESSONS

- 1 THE MOST IMPORTANT ASPECT OF THE TRANSITION TO AGILE ISN'T THE TECHNICAL ASPECTS OF THE CHANGE, BUT RATHER HOW YOU APPROACH THE INITIATIVE FROM THE BEGINNING.
- 2 GRADUALLY MAKE PROJECTS MORE ITERATIVE, INCORPORATING FOUR OR SIX PHASES WITH A DELIVERY AT THE END OF EACH.



# TRANSITIONING TO AGILE WITHOUT FEAR



## SUSANNE MADSEN

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To aid the transition, it can be advantageous to employ an Agile coach who can guide and support the team, but that coach must be able to work on the psychological aspects of change in addition to the technical aspects. If the coach is pushy and insensitive, he or she may end up being part of the problem. The transition can also be aided by gradually becoming more iterative as opposed to going straight from Waterfall to Agile, which is a big step. Iterative development is the halfway house between the two. Instead of one big-bang delivery toward the end, the project can be divided into four or six phases (or *iterations*), with a delivery after each. As the team works to shorten the iterations and increase the frequency of deliveries, it will gradually become more Agile and refine its ways. Making the transition is all about preparing and engaging the team, having the right support at hand, and implementing the changes gradually.

“

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”

# LITTLE AND OFTEN FOR EFFECTIVE COMMUNICATIONS



**JO ANN SWEENEY**

Founder,  
Sweeney Communications Ltd

Jo Ann Sweeney is a communications consultant known for her results-focused approach, consensus-building skills, and ability to clarify complex information. She specializes in working with project teams focused on technology rather than delivery, helping them get commitment from key people so that the team delivers on business goals and wins recognition for a great job. She also runs communications training for project teams and mentors leaders on their communication responsibilities.



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I'd like to share six tips for winning support from team members as well as sponsors, executives, and end users as you implement Agile methodologies in your projects.

**1. Openness and Transparency.** Share information as soon as you have it rather than waiting for full details. Don't hide anything: share both the good news and the bad. People will see that you are open and honest, and they'll be more likely to trust you.

**2. Little and Often.** Circulate information in bite-sized chunks. Rather than covering many different topics, stick to three items. Just one piece of information is even better. People will find it easier to understand what you're sharing and asking them to do.

**3. Interactive.** Give people plenty of opportunity to ask questions, raise issues, and share experiences. The more you do this, the more likely they will be to say what they really feel. Look for ways to involve people in the initial decision to move from Waterfall to Agile. They're more likely to be supportive if they've had a say.

“ Share information as soon as you have it rather than waiting for full details. Don't hide anything: share both the good news and the bad. ”

## KEY LESSONS

- 1 GIVE PEOPLE PLENTY OF OPPORTUNITY TO ASK QUESTIONS, RAISE ISSUES, AND SHARE EXPERIENCES.**
- 2 MAKE SURE YOU SHARE INFORMATION WITH STAKEHOLDERS AS WELL AS TEAM MEMBERS.**



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**4. Broaden Stakeholders.** People who can influence your project's success include sponsors, executives, end users, and managers. Make sure you're sharing information with them as well as with team members.

**5. What's Important.** Ensure that information answers these five fundamental questions:

- What are you asking me to do?
- How am I doing against your needs and expectations?
- Does anyone notice and appreciate my work?
- How is our team doing?
- How does our project fit into the bigger business goals?

**6. Face to Face Is the Best, But Not the Only.** Although face to face is effective, it's not the only communication method. A mix of methods, including print, social media, digital, and multimedia, will ensure that your activities are varied. Same old, same old becomes boring for your audience.



Although face to face is effective, it's not the only communication method. A mix of methods, including print, social media, digital, and multimedia, will ensure that your activities are varied.



# GROWING CONFIDENCE IN AGILE THROUGH COMMUNICATION



## PAUL CABLE

Consultant,  
Empachal Solutions Limited

Paul Cable is a certified project and risk management professional in addition to a Prince2 practitioner and has worked in the IT industry for more than 15 years. Paul has a wealth of experience driving and influencing stakeholders from all levels in many industries to deliver multi-million-pound projects worldwide. He currently works in finance but has previous experience in the petrochemical, communications, electronics, printing, and retail industries.



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The biggest concern management has when transitioning into the Agile world seems to be a lack of control, a perception that comes from the change in how reporting is documented, delivered, and communicated. The Agile methodology relies on considerable verbal rather than the written communication common in the Waterfall world. This shift can be a challenge for management. I worked in a company where the project sponsors and management were in another country, so documentation was important to them. The office in London had transitioned to Agile, but the head office was using Waterfall. The project sponsor constantly interrupted the project team with inquiries, which distracted the team and affected the delivery of the project. Communication is key to any project regardless of the methodology, so it was imperative that the flow of communication to head office was controlled.

## KEY LESSONS

- 1 EDUCATE THE PROJECT SPONSOR AND MANAGEMENT ON AGILE PROCESSES AND VALUES.
- 2 ESTABLISH A CLEAN, DEFINED COMMUNICATION PLAN THAT INCLUDES SHORT WRITTEN WEEKLY REPORTS AND A ONE HOUR WEEKLY TELEPHONE CONFERENCE.

“ The biggest concern management has when transitioning into the Agile world seems to be a lack of control, a perception that comes from the change in how reporting is documented, delivered, and communicated. ”



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First, we educated the project sponsor and management at the head office on Agile processes and values. Second, we explained how we would align Agile to Waterfall processes and demonstrated the differences in our new ways of working. Third, we established a clean, defined communication plan that included a short written weekly report and a one-hour weekly telephone conference to answer any project-specific questions. This practice protected the team from unwanted interruptions.

Over a short period of consistent delivery and clear communication, we established trust, and the project sponsor could see the positive progress we had made against the plan. By delivering the multi-million-pound project on time and under budget, we were able to galvanize that trust and confidence in the Agile methodology, which would prove beneficial to future London-based projects.

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# DOES AGILE MEAN WE DON'T HAVE TO DECIDE?



## DAVE GORDON

Project Manager,  
The Practicing IT Project  
Manager LLC

Dave Gordon is a project manager who has more than 20 years of experience in implementing human capital management and payroll systems, including on-premises ERP solutions like PeopleSoft and ADP Enterprise as well as SaaS solutions like Workday. He has a Master of Science in IT with a concentration in Project Management and a Bachelor of Science in Business. He also holds the Project Management Professional designation and professional designations in human resources (GPHR and SPHR) and benefits administration (CEBS).



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I manage Workday Software as a Service implementation projects using Workday's iterative prototyping methodology—an Agile approach refined through more than 600 implementations. It's designed to drive good decisions by providing a series of prototypes that decision makers can exercise. Everything is configured rather than coded, so they can quickly change to one of the other alternatives. If the prototype shows that a particular decision was less than optimal, the users can change their mind. But does that mean they don't have to be decisive?

I routinely start every project with a kickoff meeting in which I explain the Workday methodology to the customer's decision makers. As part of that conversation, I explain the risk of indecision. Delays come primarily from indecision rather than inaction. That's why it is vital to have the right people in the room when conducting design workshops. I present the alternatives, describe the pros and cons of each choice, and help guide them through the decision-making process. In many cases, it's easy to make to the best choice. In other cases, I can get it down to two alternatives, with neither seeming to be the obvious choice. I've seen decision makers get truly frustrated because they don't want to make the wrong choice. So, they loop other influencers and subject matter experts into the process, which only delays things.

## KEY LESSONS

- 1 START EVERY PROJECT WITH A KICKOFF MEETING.
- 2 EXPLAIN THE RISK OF INDECISION.

“ Delays come primarily from indecision rather than inaction. ”



# DOES AGILE MEAN WE DON'T HAVE TO DECIDE?



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My advice: if you can't decide, make a choice arbitrarily. Then, exercise that choice in the prototype. If necessary, reconfigure it and try another choice. Generally, I can do this without a great deal of effort. If neither option seems obviously better, then to quote Bill Murray's character in *Meatballs*, it just doesn't matter!

Agile is about anticipating change and being able to routinely handle it. Iteration is about "try it and see." So, be decisive. You're allowed to change your mind, but you shouldn't be allowed to hold up the process.

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”

# MEET WORKFRONT



Workfront is a cloud-based Enterprise Work Management solution that helps IT departments, PMOs, solution implementation groups, and other enterprise teams not only manage their work, but also think smarter about the entire lifecycle of work.

It offers a single source of truth—one system for everything from ad hoc requests to long-term projects. Workfront provides a space where team members can collaborate, prioritize, and be productive. It also offers a complete, adoptable solution—powerful enough for technical users, intuitive enough for business stakeholders, and flexible enough to utilize Agile, Waterfall, or a mix of the two.

**To learn more about Workfront Enterprise Work Management and how it can help you mix methodologies and increase work visibility, please contact us at the following:**

**[www.workfront.com](http://www.workfront.com) | + 1.866.441.0001 | +44 (0)845 5083771**