IMPLEMENTING SCRUM

## PART 3 of 5: TRAINING YOUR NEW SCRUM TEAM

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TRAINING YOUR ORGANIZATION

Implementing Scrum at an organization isn't easy, and levels of success (or failure) have a broad spectrum of variation. Although Scrum is a simple concept, the tactics to execute it aren't straightforward. That's why this article provides a high-level formula you can use to increase your team's chances of success.

A successful agile implementation is only possible when teams take the time to train themselves and their greater organization on the tenets of Scrum. This may sound simple enough, but many companies mistakenly reserve instruction for developers and QA when several layers of training are necessary for each department.

EXECUTIVES

MANAGERS

SCRUM MASTER

TEAMS
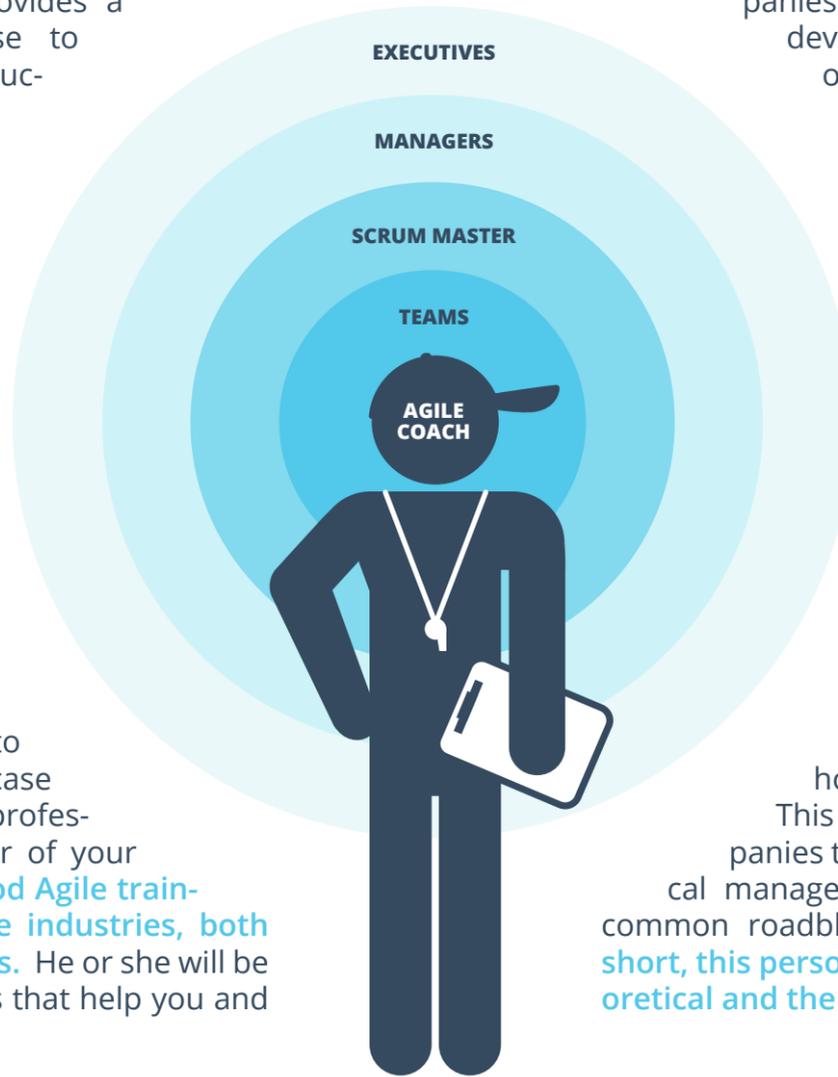
AGILE COACH

PRE-PLANNING

Before you begin training, you will need to choose the right person to help guide your team. In a best-case scenario, this person will be a professional agile coach, not a member of your organization. That's because a good Agile trainer/coach has worked in multiple industries, both training and running Scrum teams. He or she will be able to cite real world experiences that help you and

your company understand what's possible, what's reasonable, and how the journey will look over time. This person also knows how to help companies transition away from strict, hierarchical management structures while overcoming common roadblocks that often slow progress. In short, this person bridges the gap between the theoretical and the practical.

ROI CALCULATION

Professional Scrum trainers have an outside perspective that can potentially hone-in on weak areas your team wouldn't otherwise be aware of. This unique viewpoint can help tailor the Scrum implementation process to your needs, and may carry more weight with executives. To persuade the leadership team a trainer could be beneficial, try reworking our Return On Investment (**ROI**) calculation for your own situation.

Let's say we have a team of 10 that consists of...

    1 PRODUCT OWNER
   **1 SCRUM MASTER**
    6 DEVELOPERS
    2 TESTERS

From here, let's also assume that the fully-loaded cost of this team is about $2,000,000 a year and that this team creates $4,000,000 in revenue per year for the company.

If an Agile Coach were to increase the team's productivity by 5%, in the first year, this coach could lower costs by as much as $100,000 and could impact revenues by as much as $200,000.

Coach = + 5% Productivity = $4,200,000 Revenue*

So long as the coach costs less than $100,000, executives may consider it a worthy investment!

$4,200,000 - Cost of Team = $2,200,000

Although ROI can be a good general measuring stick for cost and value, not every company optimizes for dollar value. If your team is working to decrease risk or achieve other goals, start with a measurement baseline and check results against that metric as you roll out Scrum.

*Assuming a 5% increase in productivity increases revenues by 5%.

STEP 1: BEGIN TRAINING

Whether or not you decide to employ the services of a Scrum trainer, your whole team will still need some form of education. At this point, it's time to determine which groups of people need training and identify their specific needs:

2-4 hours

1-2 days

2+ days
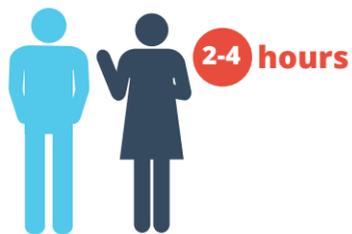
EXECUTIVES

Though you might not think executives need training, they do require a high-level understanding of agile as it pertains to your organization, and require problem-solving resources for lean thinking. This group will need to focus on organizational, cultural, and communication problems endemic to the company, while receiving training that covers agile topics in broad strokes, rather than execution-oriented specifics. Remember: Executives are busy. You'll likely only get two to four hours of their time, so make it count.

MANAGERS

These teammates should receive high-level training that's paired with hands-on exposure to the nuts and bolts of a Scrum process. The transition to self-organizing teams will change management positions quite a bit, so prepare them for their new roles with training in lean thinking, facilitation, and coaching. Make sure the change is presented as an opportunity for managers to renew their purpose, and provide a clear list of duties they should shift toward.

DEVELOPMENT TEAM

Last, but not least, we can't forget the educational needs of your development team. Because the team will be participating in Scrum implementation on a day-to-day basis, it's essential to provide all the training necessary to solidify their understanding of the Scrum methodology. Fortunately, your team also has the most time to dedicate to training, so don't short-change them by rushing the process. Feel free to spend a few days on up-front instruction and hands-on exercises, then encourage ongoing learning with follow-up coaching.

STEP 2: BUILD YOUR FIRST SCRUM TEAM(S)

At first, it may seem like you should build your Scrum teams like you would build any other project team: "Let's add 3 developers, 2 testers, etc..." But what you should really do is to strike a balance between the people who are most interested in Scrum, and people with required, specialized skillsets. The last thing your team needs is someone who is dead set against the initiative- only team members who are excited about these changes will deal with the bumps and bruises of the learning curve. Finding the right people for a team is always a delicate balancing act, so be sure to include your coaches, trainers and managers in the process.

THINGS TO LOOK FOR WHEN CHOOSING TEAM MEMBERS:

CHANGE

Breadth
(Can play multiple roles)

Curiosity

Depth
(At least 1 area of specialty)

Open to change

IT'S GREAT IF YOU CAN FIND PEOPLE WHO HAVE USED SCRUM BEFORE, BUT IT'S MOST IMPORTANT TO CHOOSE PEOPLE WITH THE RIGHT ATTITUDE.

STEP 3: TRAIN YOUR PRODUCT OWNER

Obviously, you'll need to determine who the Product Owner is before you begin this step. Usually this individual will come from the product management department, but a project manager, business analyst or involved stakeholder can assume this role. Whomever you choose, it's important for this person to have a keen understanding of the product's business value, so they can prioritize and drive results effectively. The Product Owner has the most important role in the Scrum process. This person will be the ultimate content authority, so the development team can rely on a single source for direction. Since he or she is responsible for the ROI of the project, the product owner balances competing stakeholder interests, determines the most important items, and prioritizes user stories. Without this key role, many teams become distracted and unproductive over time because they're trying to manage too
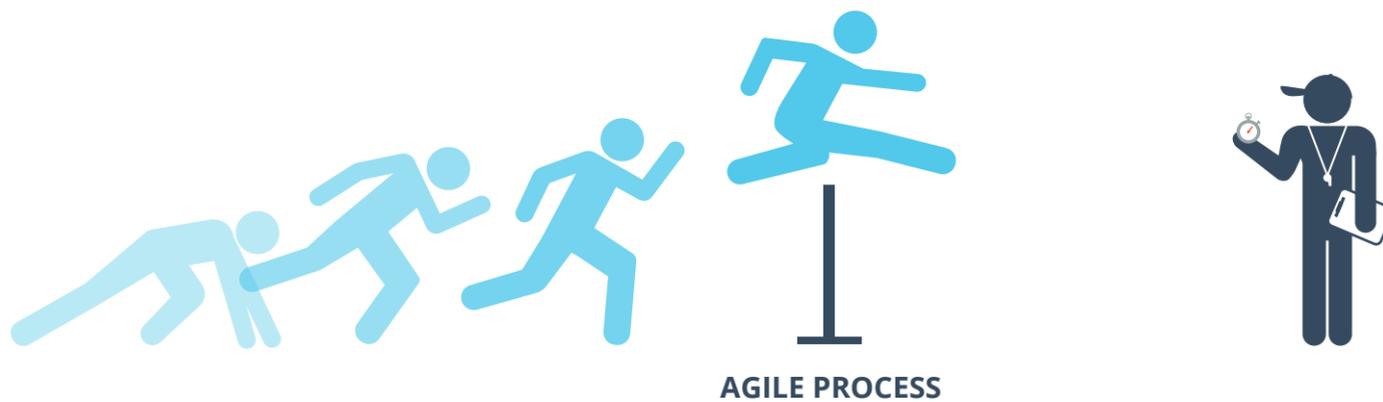
AGILE PROCESS

many stakeholder requests. Product owner training should ensure he or she is fully comfortable with the Scrum process and knows how to best support the team. That doesn't mean this person needs to micromanage, or even project manage. It just means he or she should be able to provide the proper input to the team, and verify the output quality.

STEP 4: CHOOSE A SCRUM MASTER

The Scrum Master is the person responsible for helping your team and organization follow the Scrum framework. Preferably this person will have their Certified Scrum Master credential, but if they are untrained and/or inexperienced, then he or she will need to spend extra time researching and working closely with the agile coach. When a Scrum Master is being chosen, a candidate's leadership style and personality are what determine their effectiveness. Initially, many companies select project managers to fill the Scrum Master role due to their previous experience, but these individuals aren't always a good fit. Traditional project managers are often used to "driving" teams by assigning tasks and making executive decisions. While this is necessary in a waterfall setting, such an autocratic approach would short-circuit a team's ability to self-manage in an agile environment. That's why the choice of Scrum Master is more a function of personality rather than (previous) job title. Any person who has a facilitative/diplomatic personality and can act as a "servant leader" will make a good scrum master.

QUALITIES

+ CERTIFIED
+ EXPERIENCE
+ FACILITATIVE
+ DIPLOMATIC
+ SERVANT LEADER

## STEP 5: MEASURE YOUR LEARNING

All that training and coaching is for naught if you don't measure results. For newly agile teams, the best indicator of value is how much team members learned. This is because learning increases ROI and decreases the risk of adopting a new process. Of course, there are more things you could measure, but in the first 3 months of a new adoption, those other measurements are not very valuable.

KEY METRICS FOR THE FIRST THREE MONTHS:
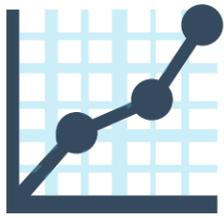
A stabilized measurement of what the team gets completed every 2 weeks
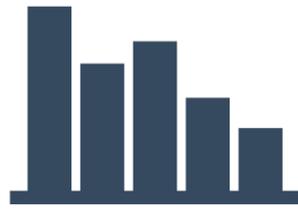
A regular cadence of delivering working product

Increased satisfaction from stakeholders

HERE ARE SOME TAKEAWAYS

There is no such thing as a cookie-cutter process for implementing Scrum. There are tactics that work well for some companies, but don't work well for others. The key is to keep an eye on what you're trying to accomplish, and ensure the team is meeting benchmarks.

Pre-Planning - Don't be afraid to hire short or long-term help from an agile coach and make sure you have executive buy-in.

Step 1: Time to Begin Training - Recognize that every department will need to have its own unique training and be sensitive to the time-commitment each group can make.

Step 2: Build Your First Scrum Team(s) - Strike a balance between the people most interested in Scrum and people with the specialized skill sets you need.

Step 3: Train Your Product Owner - Ensure he or she is fully comfortable with the Agile process, knows how to best support the team, and is able to verify the output quality of the team.

Step 4: Choose a Scrum Master - It's easier to teach Scrum skills to someone with the right personality, than it is to change the personality of an experienced, authoritarian manager.

Step 5: Measure Your Learning - The best indicator of value is learning because it increases ROI and decreases the risk of adopting a new process.