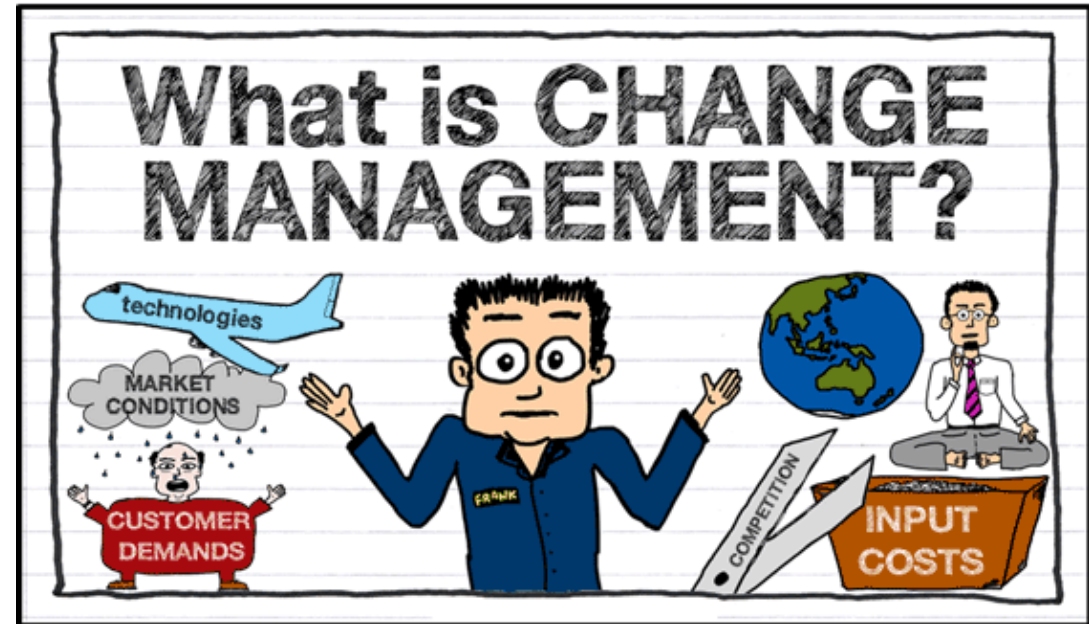# Topics

- Context around change and change management

- Recognizing change

- Traditional Waterfall approach to change

- Agile approach to change

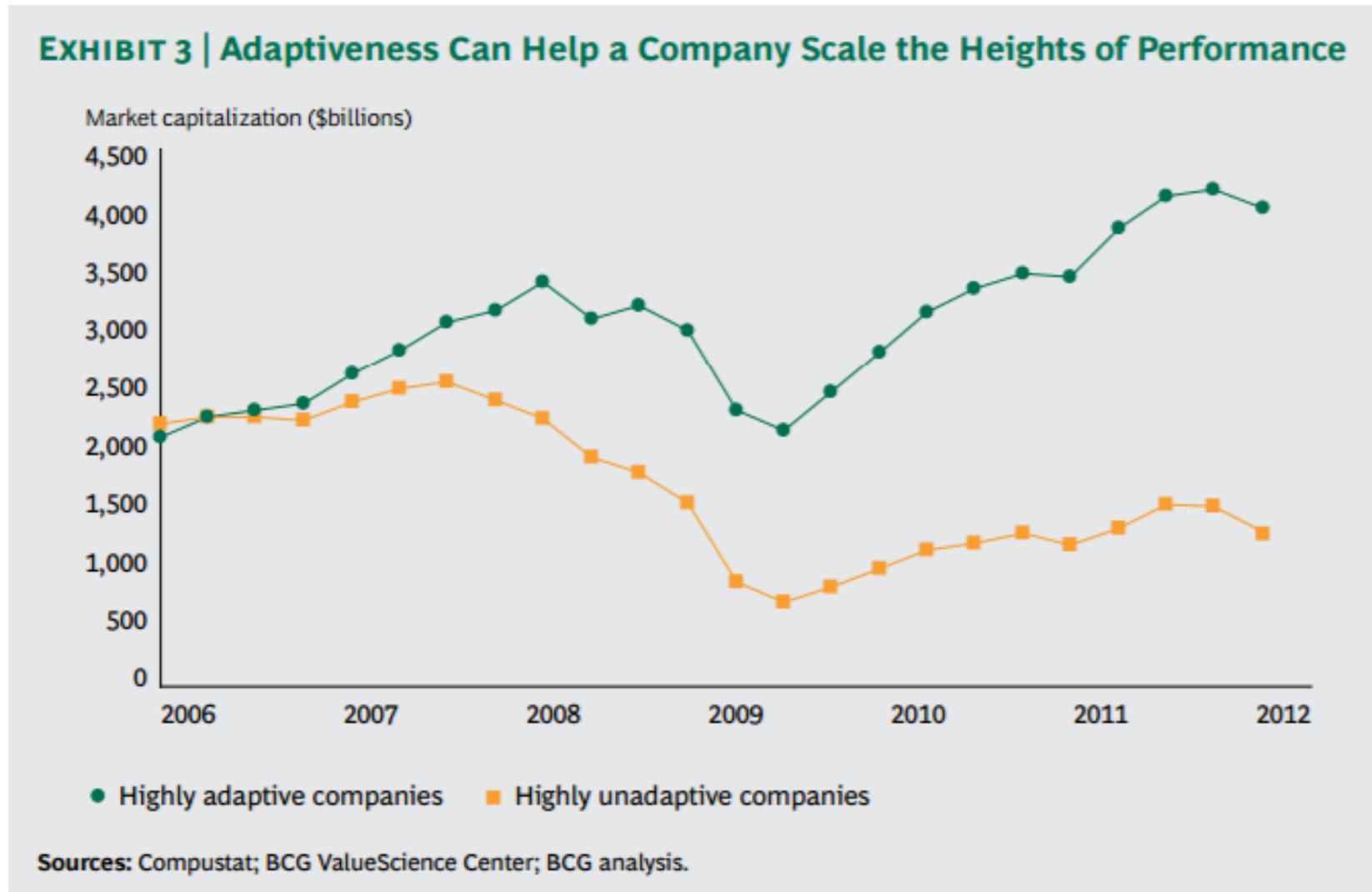- Agile vs. Waterfall

- Practices and Takeaways

Some words about change…

It is not the biggest businesses that survive
nor the most intelligent,

But the ones most responsive to change.

Charles Darwin
(with a little help from business people)

Being adaptive pays off…#literally

EXHIBIT 3 | Adaptiveness Can Help a Company Scale the Heights of Performance

Source: Boston Consulting Group, "Winning in an Age of Turbulence", 2012 accessed via www.bcg.com/documents/file112829.pdf

The value of adaptiveness

- Adaptiveness creates both short-term and long-term value

- Adaptiveness creates a performance gap between the top performers and the rest of the pack

- Adaptiveness predicts future performance

- The value [placed upon] adaptiveness is increasing

So why do we freak out with change?

"… change is a complex phenomenon. It takes more time and nurturing than change agents often wish and is always difficult for those affected. Change involves loss of comfortable and well-understood patterns, processes, relationships and roles."

Source: Gallos, Joan V., "Loss and Change: A Developmental Opportunity for Teaching Wisdom, Compassion, and Respect for the Human Condition Using Joan Didion's *The Year of Magical Thinking*", *Academy of Management Learning and Education*, June 2007

Managing Change: New Beginning Phase

Uncertainty

Commitment

Excitement

Anticipation

Creativity

Innovation

Accomplishment
High energy
Learning

Ending

Transition Zone

New Beginning

Confusion

Anxiety

Relief

Reservation

Resistance

Unsure

Frustration

Denial

Confusion

Ambivalence

Skepticism

Exploration
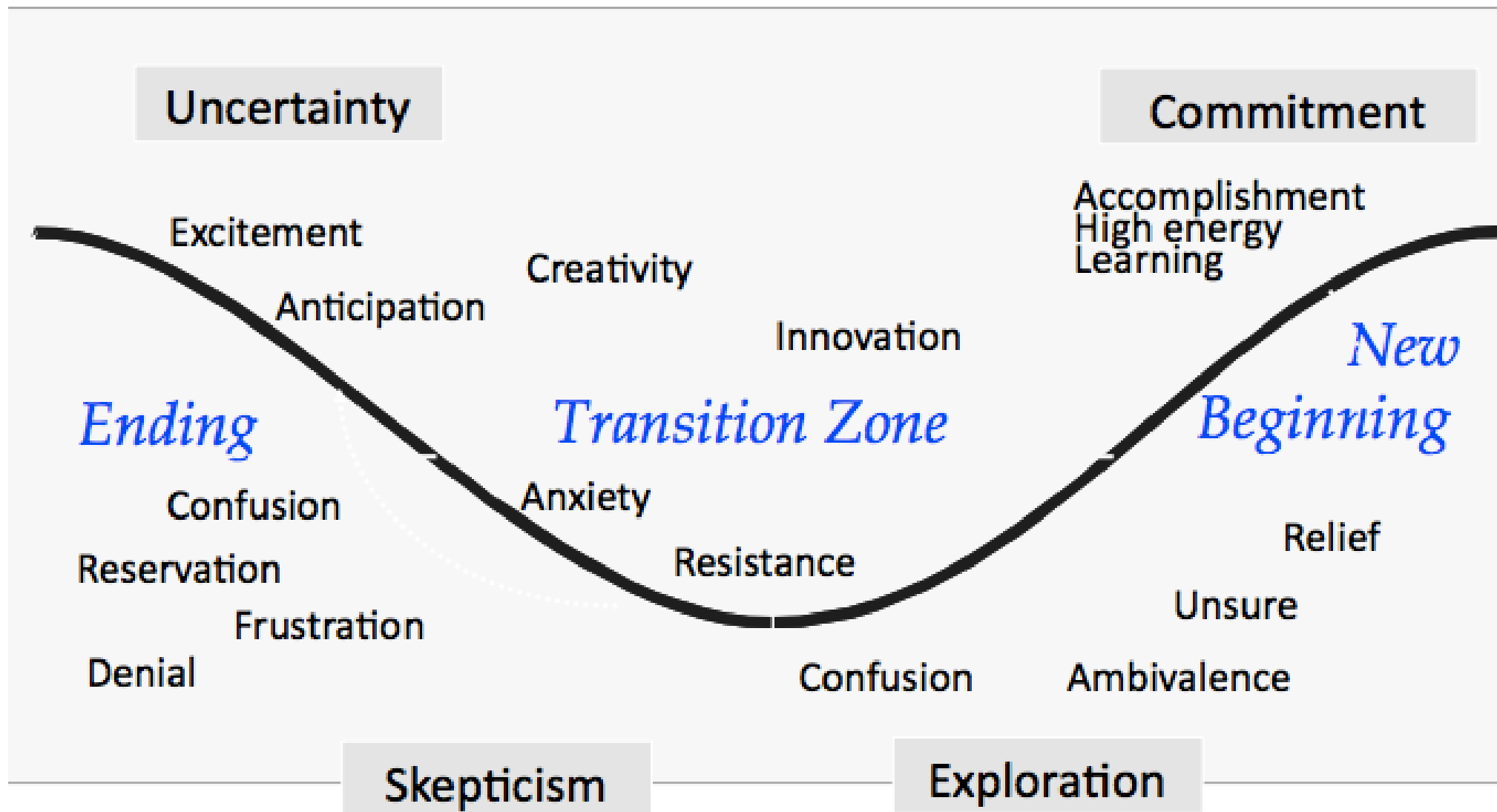
Adapted from Managing Transitions, William Bridges

Let's put some context around the term "change"

For your project, change can represent:

- Something new and unexpected

- A variation in what, how, or when you were planning to do something

- Can represent "more" .... money, time, resources

- May be a disruptive element if left unchecked

- Sometimes, for some, it's a nicer way of saying "Scope Creep"...

Recognizing Change

- Change is ever present
  - Can you name one project where you didn't have any change?
- Key phrases indicating a change is coming include
  - I have been meaning to ask you about this new feature...
  - I was thinking we can...
 - What if we do it this way...
  - I forgot about...

1. Change is often "in the eye of the beholder"

2. While there may be small change(s), think about sum of all changes together…

Traditionally, what is a Change Management?

- Most have experienced Change Management as a formal process to ensure that changes are introduced in a _controlled_ and _coordinated_ manner

- Business Process Changes:

  Changes proposed by the business to improve the day-to-day work efforts of the business teams such as automating a manual process

- Change Controls

  Scope change for items that were not in the original scope such as an additional interface to collect data from a secondary system

Change Management

Business Process Changes
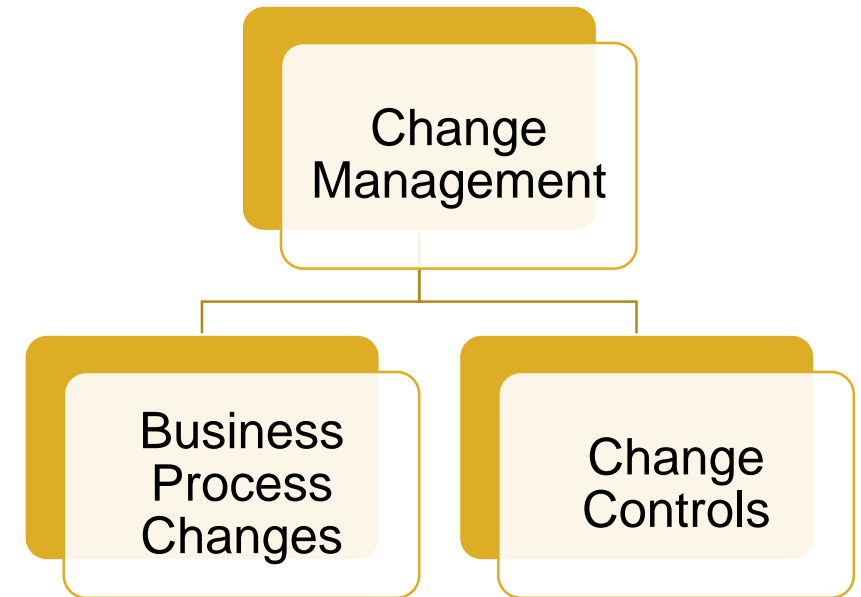
Change Controls

Traditional (Abbreviated) Waterfall Change Control Process

1 — Identify the Change

- Identify the need for a change, gather all the details necessary to have a good understanding of the item

2 — Record, Classify, Prioritize

- Capture all the details regarding the requested change
- Classify change request: new or clarification of an existing requirement?
- Prioritize the change against all other requirements

3 — Assess Impact

- Assess the impact of the change to the business value
- Assess the impact the change will have to the project (effort, timeline, financials)

4 — Re-plan

- Decision the change through the Change Request Control Board
- If approved, integrate into plan and deploy impact
- If rejected, record why it was rejected

What should we do ?

Manifesto for Agile Software Development

We are uncovering better ways of developing
software by doing it and helping others do it.
Through this work we have come to value:

Individuals and interactions over processes and tools

Working software over comprehensive documentation

Customer collaboration over contract negotiation

Responding to change over following a plan

That is, while there is value in the items on
the right, we value the items on the left more.

Source: http://agilemanifesto.org

Scrum is an Empirical Process

- Scrum is based upon applying an empirical process control mindset

  – An empirical process embraces change versus discouraging it

- The 3 components of any empirical process are:

  – Inspection

  – Adaptation

  – Transparency

Source: Sutherland, Schwaber, "The Scrum Guide", 2016

Implications of Change

- Just one major benefit to using an Agile approach is to harness information to help drive greater value and reduce risk

  — Change is unpredictable, but expected

  — How to acknowledge change when we see it, but not panic
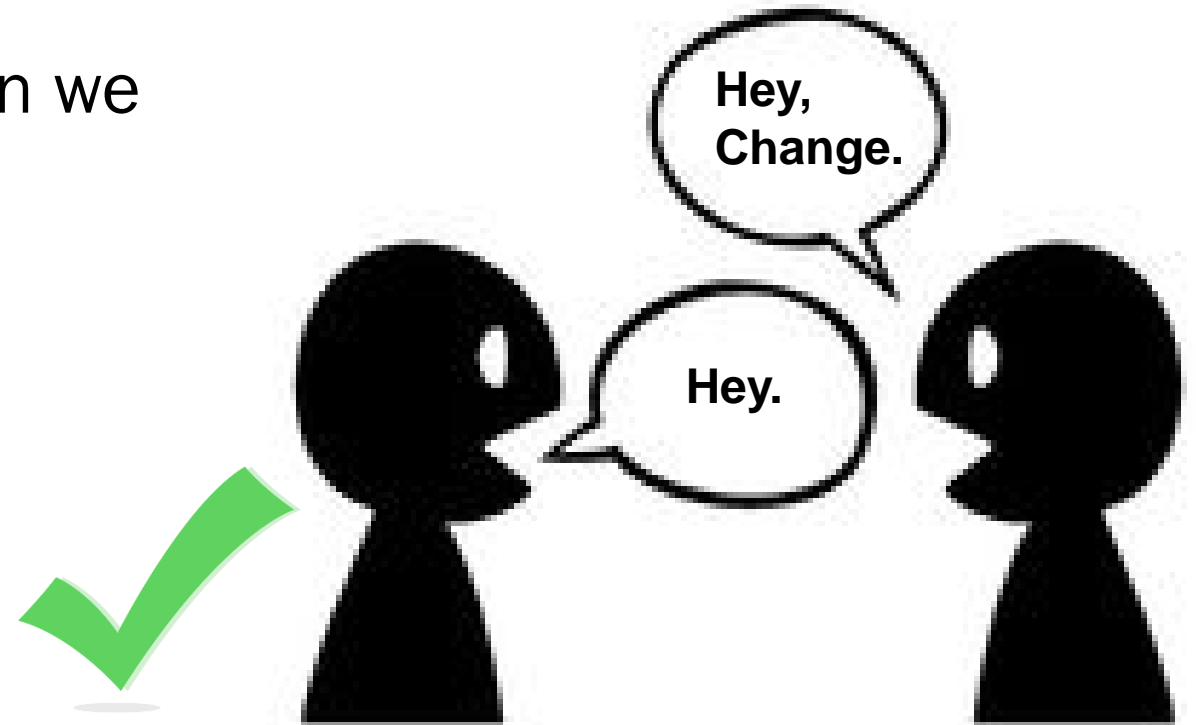
Benefits Obtained from Implementing Agile

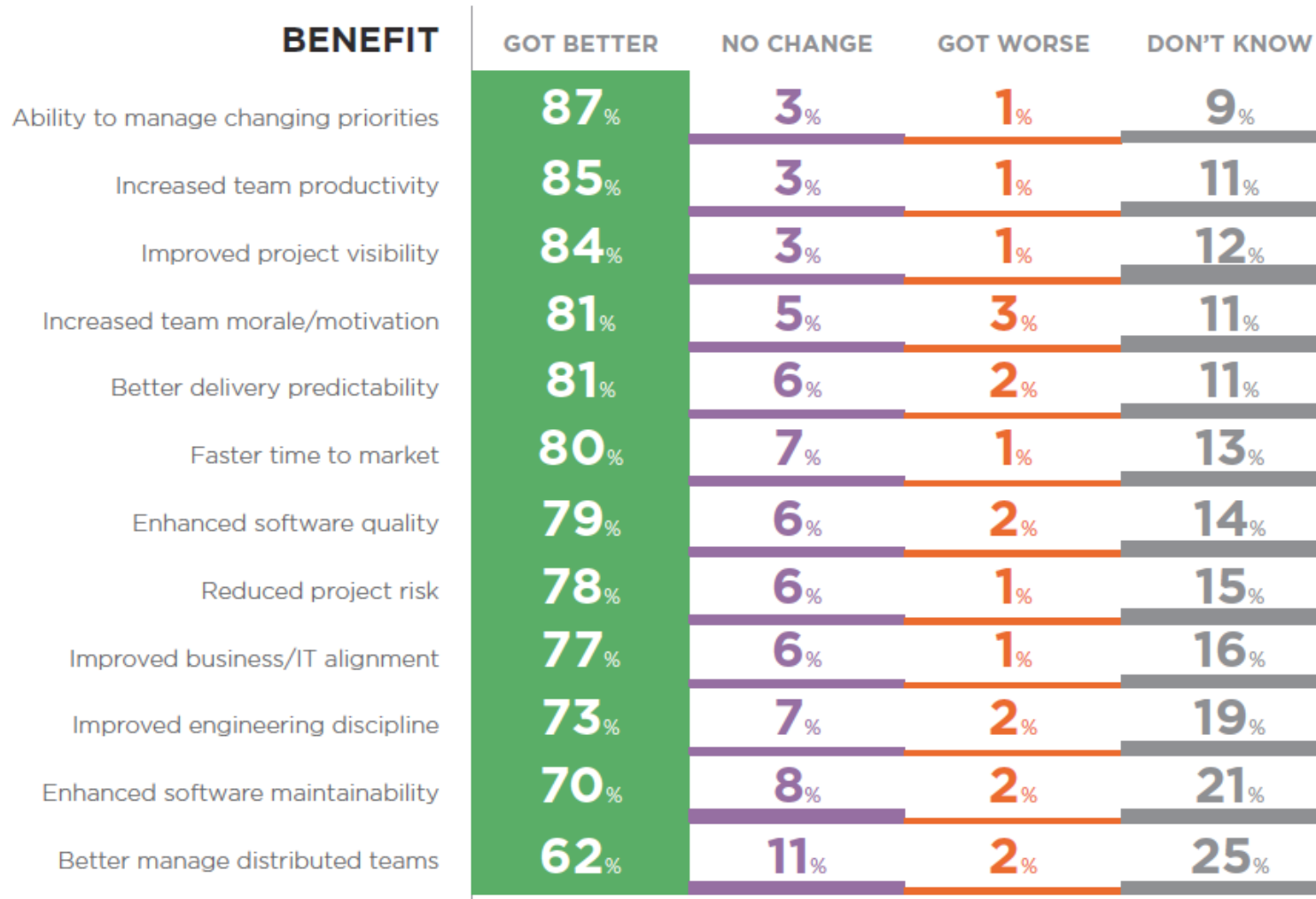| BENEFIT	GOT BETTER	NO CHANGE	GOT WORSE	DON'T KNOW
Ability to manage changing priorities	87%	3%	1%	9%
Increased team productivity	85%	3%	1%	11%
Improved project visibility	84%	3%	1%	12%
Increased team morale/motivation	81%	5%	3%	11%
Better delivery predictability	81%	6%	2%	11%
Faster time to market	80%	7%	1%	13%
Enhanced software quality	79%	6%	2%	14%
Reduced project risk	78%	6%	1%	15%
Improved business/IT alignment	77%	6%	1%	16%
Improved engineering discipline	73%	7%	2%	19%
Enhanced software maintainability	70%	8%	2%	21%
Better manage distributed teams	62%	11%	2%	25%

*Respondents were able to make multiple selections.

Source: 10th Annual State of Agile Survey, VersionOne, 2016.

Where change appears in a Sprint
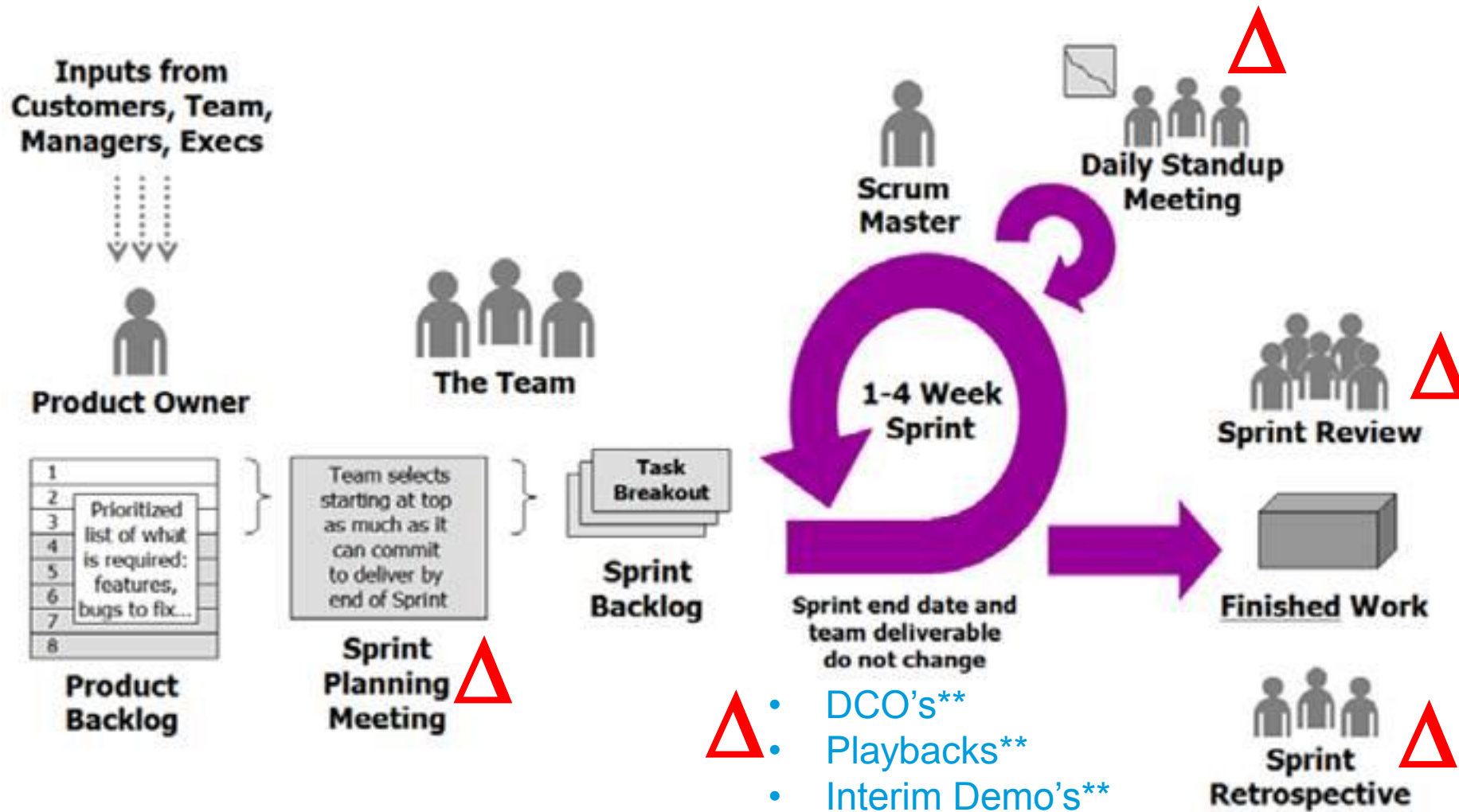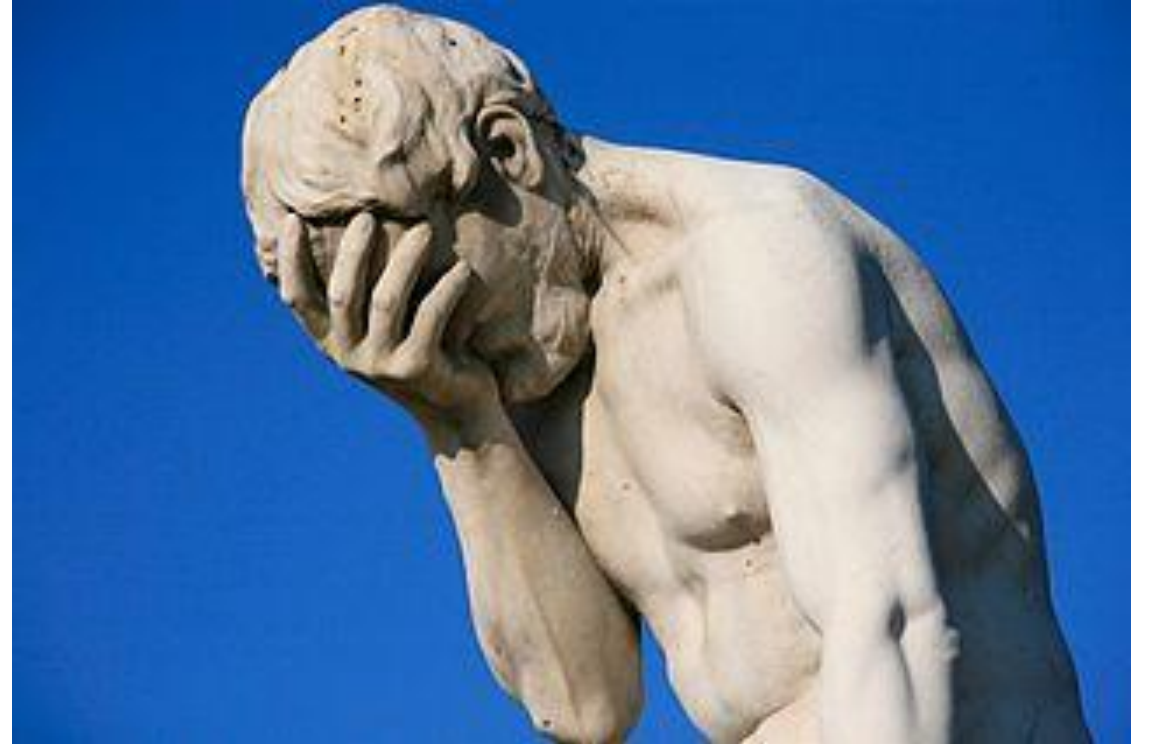

- DCO's**
- Playbacks**
- Interim Demo's**

Image Source: http://www.sadhanbiswas.com/myblog/wp-content/uploads/2009/06/2010/08/agile-Scrum.jpg

What not to change in a sprint…

- Sprint end dates

- Sprint goals
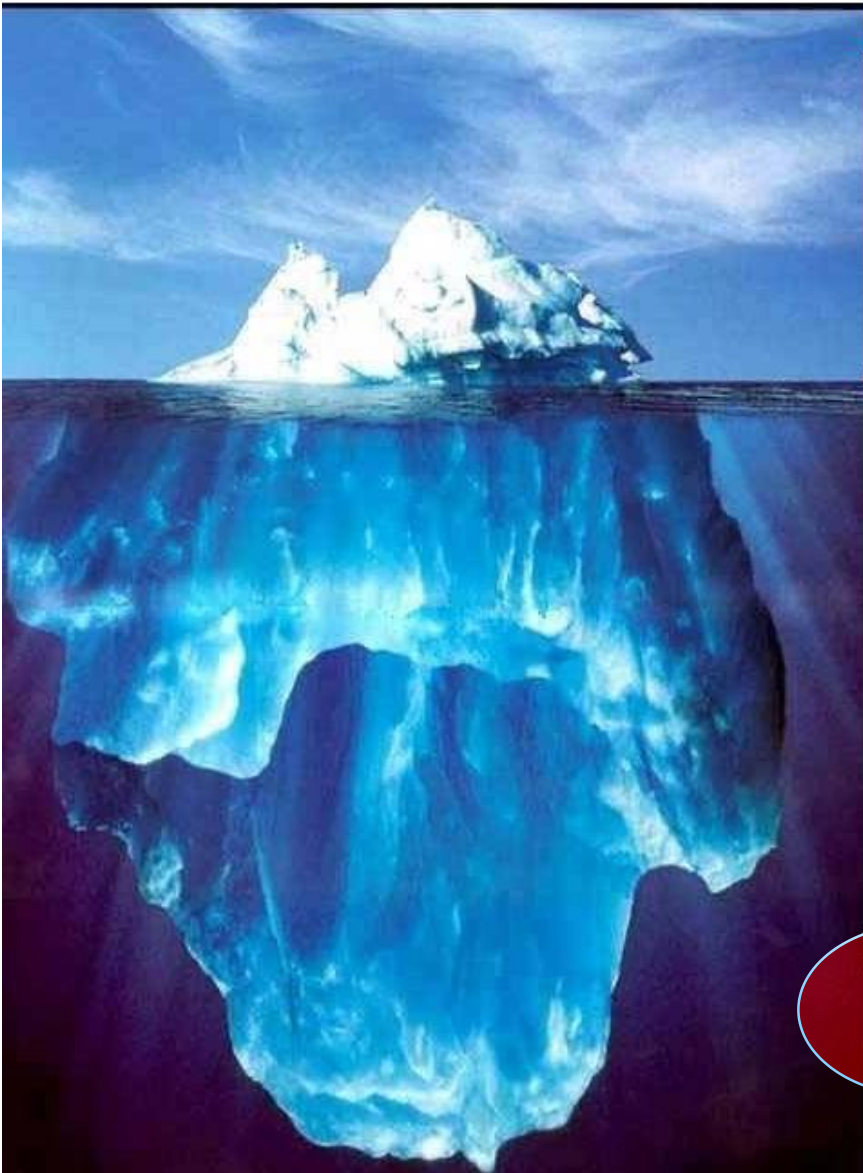
- Definition of Done

- Team members

Role of Change in Scrum:
Exploit feedback to maximize business value

- Change requests can be added (revised) to the backlog at any time
  - Recommend to "hold" requests in a "New" or "Proposed" state
    - Prevent too many "small" changes flooding the team for analysis
  - Several times a week, evaluate proposals with a small team
    - 3 (or more) Champions approach (typically leads from multiple perspectives, such as business, technology, quality, UX, arch, etc.)
    - Does this make sense? More Info needed?
    - Any impacts to release?
    - Can we size and/or task work?
    - Do we agree with proposer's suggested criticality/priority?
  - Story gets prioritized, just like any backlog item
  - If high enough priority, then bring in team, continue refining and then size

Change Request- Example: Release Duration set to 35 days

Requirement ID	Importance	Effort Estimate	BVA	Risk
BR_0004	1 - Critical	2d	H	2
BR_0005	1 - Critical	3d	H	2
BR_0006	1 - Critical	5d	H	3
BR_0007	1 - Critical	2d	H	3
BR_0008	1 - Critical	1d	H	3
BR_0009	1 - Critical	7d	H	4
BR_0010	1 - Critical	4d	H	4
BR_0011	1 - Critical	2d	M	4
BR_0012	1 - Critical	9d	M	4
BR_0013	1 - Critical	5d	M	4
BR_0014	1 - Critical	4d	M	4
BR_0015	1 - Critical	3d	M	4
BR_0016	2 - Very Important	2d	M	4
BR_0017	2 - Very Important	5d	M	4
BR_0018	2 - Very Important	8d	M	4
BR_0019	2 - Very Important	10d	M	4
BR_0020	2 - Very Important	12d	M	4
BR_0021	2 - Very Important	4d	M	4
BR_0022	2 - Very Important	3d	M	4
BR_0023	3 - Important	2d	M	4
BR_0024	3 - Important	5d	M	4
BR_0025	3 - Important	8d	M	4
BR_0026	3 - Important	10d	M	4
BR_0027	3 - Important	4d	M	4
CNG_001	1 - Critical	4d	H	4
CNG_002	1 - Critical	4d	H	4

In Scope for Current Release-
Total Effort Estimate: 35 days

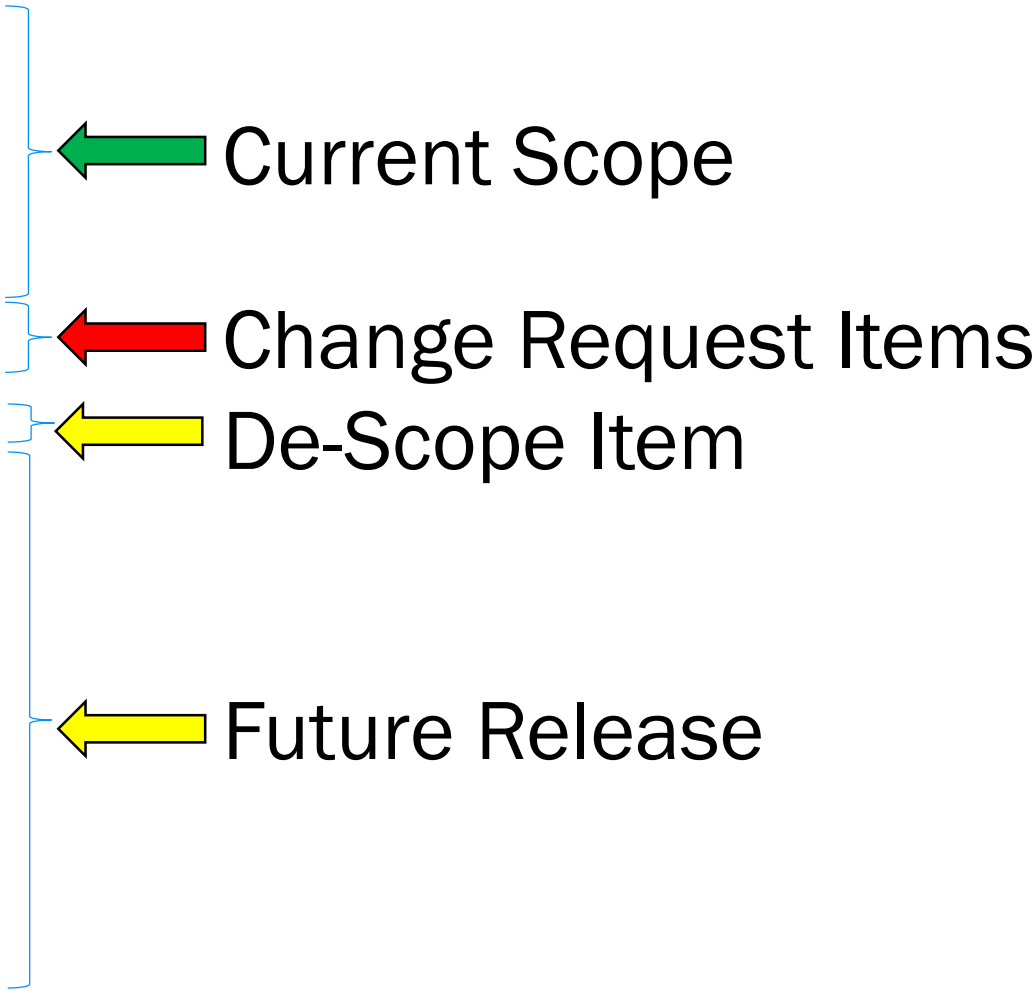**Future Release**

Proposed Change Request Items added to Backlog

Incorporating Change Request into existing Release duration

Requirement ID	Importance	Effort Estimate	BVA	Risk
BR_0004	1 - Critical	2d	H	2
BR_0005	1 - Critical	3d	H	2
BR_0006	1 - Critical	5d	H	3
BR_0007	1 - Critical	2d	H	3
BR_0008	1 - Critical	1d	H	3
BR_0009	1 - Critical	7d	H	4
BR_0010	1 - Critical	4d	H	4
BR_0011	1 - Critical	2d	M	4
CNG_001	1 - Critical	4d	H	4
CNG_002	1 - Critical	4d	H	4
BR_0012	1 - Critical	9d	M	4
BR_0013	1 - Critical	5d	M	4
BR_0014	1 - Critical	4d	M	4
BR_0015	1 - Critical	3d	M	4
BR_0016	2 - Very Important	2d	M	4
BR_0017	2 - Very Important	5d	M	4
BR_0018	2 - Very Important	8d	M	4
BR_0019	2 - Very Important	10d	M	4
BR_0020	2 - Very Important	12d	M	4
BR_0021	2 - Very Important	4d	M	4
BR_0022	2 - Very Important	3d	M	4
BR_0023	3 - Important	2d	M	4
BR_0024	3 - Important	5d	M	4
BR_0025	3 - Important	8d	M	4
BR_0026	3 - Important	10d	M	4
BR_0027	3 - Important	4d	M	4

Current Scope

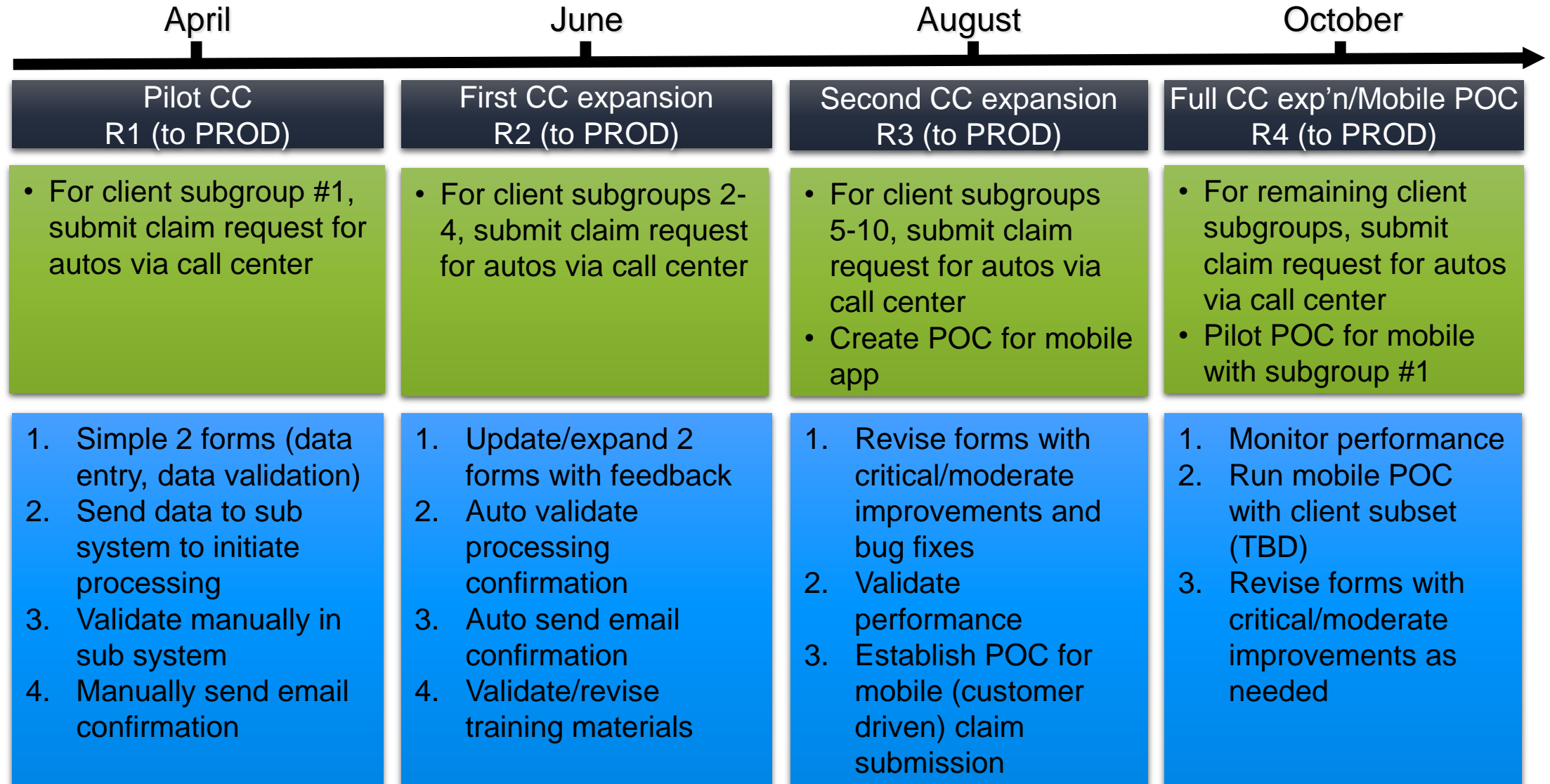Change Request Items

De-Scope Item

Future Release

Roles & Responsibilities

Your Product Owner should be empowered to make these prioritization decisions

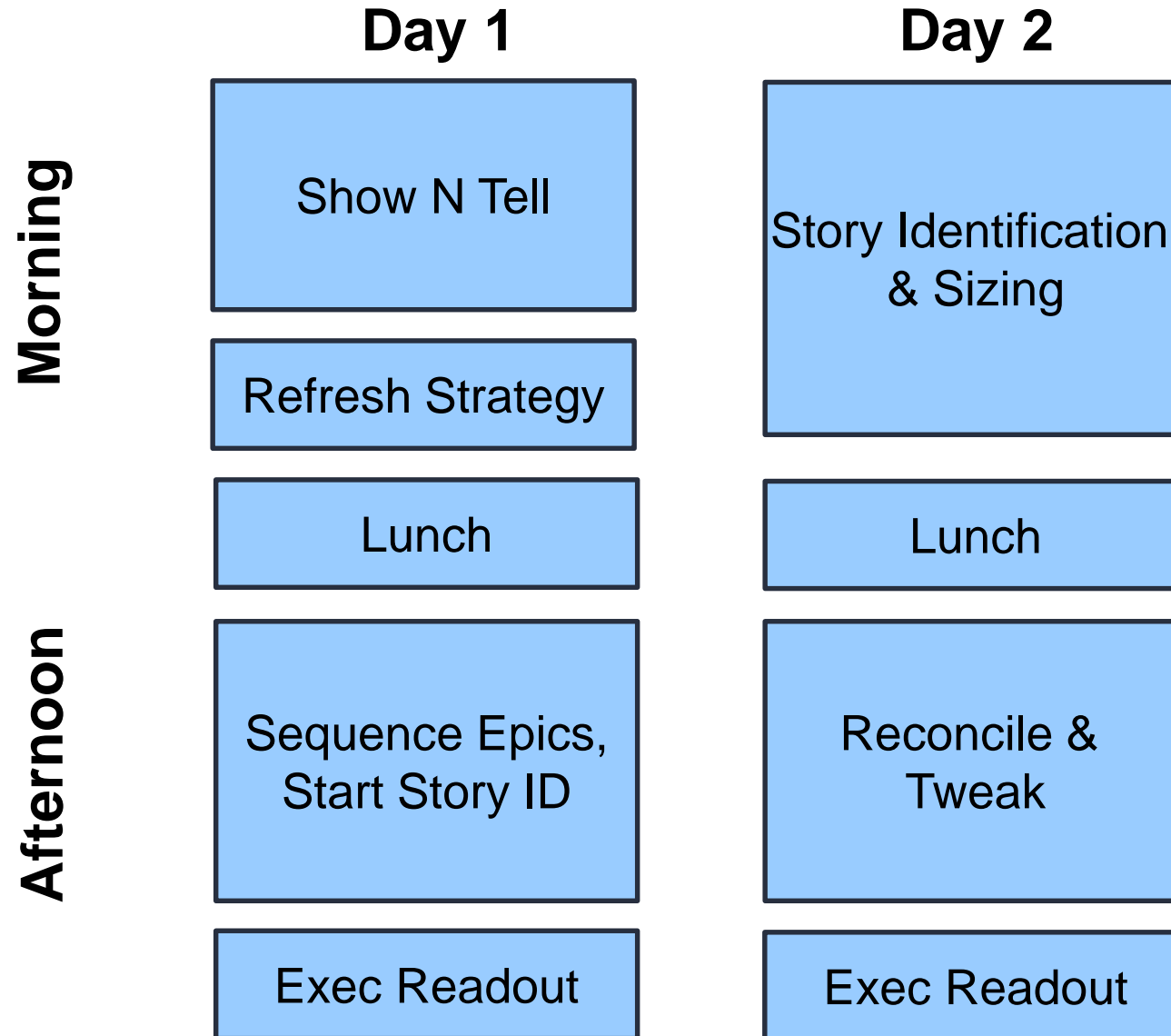- If your PO must get approval before proceeding, then this is a sign your PO is not empowered...

Roadmap: Example Template

April	June	August	October

Pilot CC R1 (to PROD)	**First CC expansion R2 (to PROD)**	**Second CC expansion R3 (to PROD)**	**Full CC exp'n/Mobile POC R4 (to PROD)**
• For client subgroup #1, submit claim request for autos via call center	• For client subgroups 2-4, submit claim request for autos via call center	• For client subgroups 5-10, submit claim request for autos via call center • Create POC for mobile app	• For remaining client subgroups, submit claim request for autos via call center • Pilot POC for mobile with subgroup #1
1. Simple 2 forms (data entry, data validation) 2. Send data to sub system to initiate processing 3. Validate manually in sub system 4. Manually send email confirmation	1. Update/expand 2 forms with feedback 2. Auto validate processing confirmation 3. Auto send email confirmation 4. Validate/revise training materials	1. Revise forms with critical/moderate improvements and bug fixes 2. Validate performance 3. Establish POC for mobile (customer driven) claim submission	1. Monitor performance 2. Run mobile POC with client subset (TBD) 3. Revise forms with critical/moderate improvements as needed

Release Planning Approach Overview

	Day 1	Day 2
Morning	Show N Tell	Story Identification & Sizing
	Refresh Strategy	
	Lunch	Lunch
Afternoon	Sequence Epics, Start Story ID	Reconcile & Tweak
	Exec Readout	Exec Readout

Day 1 Afternoon / Day 2 Morning – In Action…

- Epics are printed from system for all items in release for all teams (both Agile and WF)
- Business and Technology force-rank prioritize
  - Items at top of table are highest priority
- Estimate / confirm size of epic(s)
  - Teams given preset # of stickies, representing available time
  - Color-coded by team
  - Teams put stickies on stories
- Understand dependencies between teams
  - Orange stickies represent critical dependencies
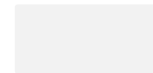
Do I still need a Change Control Board?

- Actually, it is recommended
  - Not all your projects in your organization may be "Agile" or "Scrum"
- Agile doesn't mean "free reign for everybody." There needs to be reasonable guardrails. *Reasonable…*
- Need to have clear threshold / intake criteria, such as:
  - Does it impact teams outside of your project or program?
  - Is there a financial limit (e.g. do as long as its 1 sprint or less of work, with a certain burn rate per sprint)?
  - Do you impact overall release timeframe?
  - Does this impact core vision of company? Product?

Tips for Change Management in Agile

- Make sure understanding of embracing change is expected from project inception
  - Project Charter / Kickoff
  - Clear roles & responsibilities
    - Product Owners, Stakeholders in Reviews, Teams, etc.
  - Guardrails for a change management board
  - Expected behaviors for change
- Hold those involved to expected behaviors during product builds
  - Especially for management and customers/stakeholders
  - Takes greater discipline to be self-organized
    - With great power comes greater responsibility…

Recap & Key Nuggets...

Comparing Change of Agile vs. Traditional Waterfall

Concept	Waterfall	Agile
Philosophy of Change	Tends to favor resisting change	Exploit the change
Change Management Process	External "process" to manage change	Change built into the "process" and roles/responsibilities
People Involved	Change control board	Teams, Product Owners
Levels of "permissible" change (authority)	Should be defined	Should be defined

Key Takeaways

1. Document and communicate the change management plan. Change Management is everybody's job!

2. Make sure all impacted areas are made aware of the Change

3. Change Control Review Board is a great mechanism to manage and monitor change; establish clear threshold

4. An individual Change Request may not be too impactful, but collectively, Change Requests will likely distract the team and potentially negatively impact the project

5. Before accepting a Change into your scope, always ask WHY this is important to the project objectives. Don't forget about the "So That" clause of your User Story…

6. Resist the temptation to give an estimate without reasonable analysis

7. If managed correctly, change - even rapid change - can become the key to business success

And when all else fails….
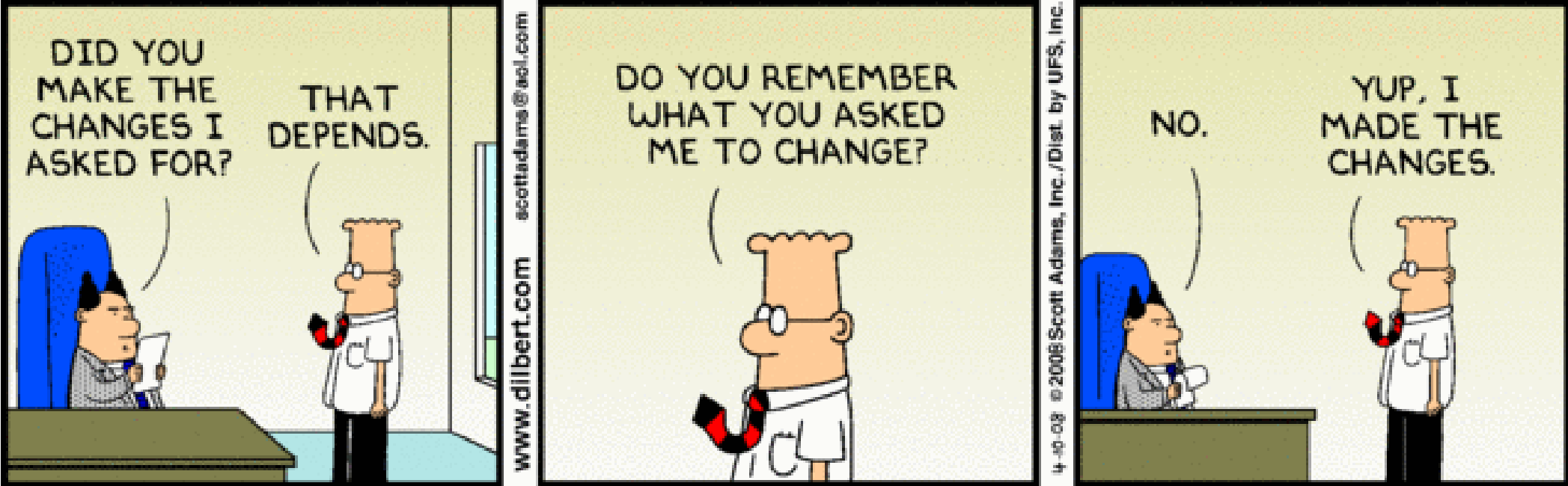
The 2015 Scrum Series – Available for Replay!

Getting Started With Agile Scrum

September 23rd, 10:00 am EDT
What are the key considerations, enablement approaches, and practical tips on how to get started with agile?

Building an Effective Scrum Team

October 14th, 10:00 am EDT
Learn who should be on a scrum team and how to staff one to achieve your goals.

Managing Offshore Relationships

October 28th, 10:00 am EDT
Learn how to overcome the challenges of cultural differences and time zone issues to enable informal communications and teamwork.

Getting to "Done"

November 12th, 10:00 am EST
What is the definition of "done" when project teams develop in relatively short cycles and change is anticipated and welcomed?

Testing in Scrum

November 23rd, 10:00 am EST
Join this webinar to learn what tools and practices are available for testing and discover what "good enough" means.

Agile Metric Mythbusters

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Join this webinar to learn more about what to measure, how to measure it, and what it all means in an agile environment.

Agile Best Practices

December 16th, 10:00 am EST
Transitioning to agile is a journey. Join this webinar and tackle what makes agile transitions successful.

www.pega.com/agile