SMART SCALING

Finding the right approach for your organization
+ **Introductions**

**Steve Spearman**  
Steve is an Agile Coach & Certified Scrum Trainer (CST) with a passion for happier teams, business improvement, and managing change.  
@sgspearman

**Richard Dolman**  
Richard is an Agile Coach & Trainer passionate about empowering & enabling collaborative, high-performing teams and fostering organizational agility.  
@richar_ddolman
Scrum Coach Retreat

How we got started…

As a coach, I need to be able to help guide my clients thru decision making, implementation & sustainability for scaling frameworks so that they can make the right choices & achieve the right benefits for them.

Scaled Agile Differentiator

For organizations who are interested in scaling frameworks, our scaling differentiation tool provides a comparative analysis unlike heated internet diatribes. Our tool (SAD) will provide guidelines in the selection of the appropriate scaling framework for your organization.
ASK

What is your definition of “Scaling”?
What are you looking for in this session?
What is common among scaling approaches?
This is just a starting point. This is evolving – case in point – adding in “Scrum at Scale”. Users of this tool are encouraged to extend it.
Survey Results

We used simple Low/Medium/High ratings along with colors for 5 of the attributes. Do you agree with using only 3 simple color-coded ratings?

Answered: 24  Skipped: 5

- 70.8% Yes – keep it simple
- 12.5% No – I would add more values
- 16.7% Other, I would do something else

We did change the actual colors based on comments
Insights into Scaling Approaches

- Each of the popular Scaling Approaches offers a certain value proposition, focus, options for implementation, cost implications, and other attributes.
“Large-Scale Scrum (LeSS) is Scrum applied to many teams working together on one product. So one way of answering the question is, ‘the same focus as Scrum’, though that skirts a concrete answer.”

- Craig Larman

“Spotify’s approach to agile scaling is not really about our process or structure, it’s all about the culture.”
“…[it] approach will probably be unsuitable in organizations that are culturally very different…”

- Henrick Kniberg

“Disciplined Agile Delivery (DAD) decision process framework is a people-first, learning-oriented hybrid agile approach to IT solution delivery. It has a risk-value delivery lifecycle, is goal-driven, is enterprise aware, and is scalable.”

- Scott Ambler

“SAFe values business and practitioner outcomes over ideology, theory, framework, practice, or method.”
“You are doing something that will get a lot of heat from multiple directions, that probably means it is something worthwhile…”

- Dean Leffingwell
Insights - Spotify

Spotify offers a culture-centric approach to Scaling Agile

- With growth & multiple teams (over 50 Squads in 4 Cities), “Scrum was getting in the way more than it was helping”.
  - Agile > Scrum
  - Principles > Practices

- Squads have end-to-end autonomy over their Product(s)
- Loosely Coupled, Tightly Aligned
- Infrastructure
- Client Applications
- Features

- Squads = Scrum Teams
- Chapters = Competency Areas
- Tribes = Light-weight Matrix of Squads & Chapters
- Guilds = Communities of Practice
- Self-Service, Open Source model
- Focus on Enabling each other
- Release Train
Insights - Spotify

Spotify’s “Engineering Culture”
Insights - Spotify

Spotify’s “Engineering Culture”
Insights - LeSS

... Large Scale Scrum

- Documented in two books (and a 3rd coming soon)
- Avoids a recipe of defined process – suggests “experiments”
- Believes each team and product must inspect and adapt their own Scrum adoption
- 2 suggested org structures for
  - Up to 10 teams
  - “Many” teams
- In a recent posting, Craig Larman characterized LeSS as:
  - an *organizational design*, based on the thinking tools of:
    - systems thinking,
    - lean thinking,
    - queuing theory,
    - empirical process control,
    - team and org design research
Insights - LeSS

Large-Scale Scrum (LeSS)
Insights - LeSS

Large-scale Scrum when "many" teams: One Product Owner and Area Product Owner

Legend
- extra meetings may occur not shown on this diagram

Large-Scale Scrum (LeSS)
**Insights - DAD**

DAD seeks to **extend** Scrum for enterprise scale challenges

- People-first, learning-oriented hybrid agile approach
- **Risk-value delivery lifecycle and goal driven**
- **Agility at Scale** is about explicitly addressing the complexities teams face in the real world.
- Promotes Enterprise Awareness
- Key Differentiator - explicitly recognizes that agile teams are governed

**Key Steps:**

1. Focus on consumable solutions, not just potentially shippable software
2. Extend Scrum’s construction lifecycle to address the full delivery lifecycle
3. Move beyond method branding
4. Adopt explicit governance strategies
5. Take a goal-based approach to enable scaling
<table>
<thead>
<tr>
<th>Scaling Factor</th>
<th>Situation Faced</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team Size</td>
<td>106 total team members available for this initiative</td>
</tr>
<tr>
<td>Geographic Distribution</td>
<td>Team members are distributed across 3 offices within 2 time zones of each other</td>
</tr>
<tr>
<td>Compliance</td>
<td>Internal compliance only</td>
</tr>
<tr>
<td>Organizational Distribution</td>
<td>Business stakeholders are willing to relocate to the team work areas</td>
</tr>
<tr>
<td>Domain Complexity</td>
<td>The problem is a bit challenging although “business as usual” for this organization</td>
</tr>
<tr>
<td>Technical Complexity</td>
<td>The team will work with known technologies and leverage existing infrastructure wherever appropriate.</td>
</tr>
</tbody>
</table>
Insights - DAD

Disciplined Agile Delivery (DAD) + Agility at Scale

The Disciplined Agile Consortium (DAC) is the definitive source for Disciplined Agile knowledge and administers the Disciplined Agilist certification program. The DAC website is your source for disciplined agile assets, including slide decks, white papers, and posters. In addition to links to online resources, the DAC website also provides a venue for networking with certified Disciplined Agilists and lists available Disciplined Agile workshops.

Why DAD?
- DAD picks up where Scrum leaves off.
- DAD is pragmatic.
- DAD supports both lean and agile ways of working.
- DAD is based on empiricism.
- DAD provides a solid foundation from which to scale agile.
- DAD enables SAFe.
- DAD goes beyond SAFe.
- DAD is evolving.

Digital Disciplined Agile Consortium

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Insights - SAFe

...Scaled Agile Framework

- Is applicable whenever at least a few hundred software practitioners are working cooperatively on related products & solutions
- Has generated great amounts of interest from enterprises
- Is becoming supported by a large number of Agile tools

- The SAFe “big picture” has 3 levels: portfolio, program, team
- Relatively more prescriptive, pragmatic
- And more controversial....
- Evolving, growing, doing more types of training
- Release Trains
Insights - SAFe

Scaled Agile Framework

- Program Portfolio Management
- Strategic Themes
- Epic Owners
- Kanban
- Portfolio Backlog
- Business Epic
- Arch. Epic
- NFRs
- Budgets

Value Streams deliver solutions

- ART Metrics
- Release Management
- Program Backlog
- Program PI Objectives
- System Architect
- RTE

- UX
- System

- DevOps
- Shared

- Business Owners
- NFRs
- PI
- Feature
- Arch

- Release Planning
- Program Increment
- Release on Demand
- Features
- Architectural Runway

Stories
- fit in iterations
- Iterations
- Develop on Cadence
- Team Backlog
- Team PI Objectives
- NFRs
- Iterations
- Sprint Goals

AGILE TEAMS
- Product Owner
- Scrum Master
- Developers & Testers
- Continuous Integration
- Test-First
- Agile Architecture

- Code Quality

- v3.0

Lefingwell, et al.

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Figure 1 – Big Picture program level with measures highlighted
### Sample Scenarios

#### Agile Scaling Knowledgebase™ (ASK) Decision Matrix

<table>
<thead>
<tr>
<th>Custom Criteria Questions / Responses</th>
<th>Example:</th>
<th>No. We do not have a consistent or unified concepts or processes relating to agile and lean practices. OR - We have solid Scrum teams, but we need to roll out Kanban for continuous delivery.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do WE have existing, internal capabilities?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>What Problems are WE trying to solve?</td>
<td></td>
<td>We need to scale additional teams AND deal with the complexity of deploying multiple products across multiple platforms consistently and efficiently.</td>
</tr>
<tr>
<td>What problems are we observing at the Team level?</td>
<td></td>
<td>Coordination and Synchronization of dependencies and re-usability. We are highly distributed over multiple time zones and coordinating cross-team dependencies is difficult.</td>
</tr>
<tr>
<td>What problems are we observing at the Management level?</td>
<td></td>
<td>Lack of alignment of Portfolio prioritization and resources Program management is non-existent.</td>
</tr>
<tr>
<td>Our Definition of “Scaling”</td>
<td></td>
<td>Means adding more teams versus expanding into other areas of the organization. We have six (6) development teams and we need to double that number, but we’re happy with our current approach to handling our portfolio.</td>
</tr>
<tr>
<td>Other...</td>
<td></td>
<td>Insert additional Rows for YOUR Organizational Criteria... i.e. We have 2 teams &amp; are growing rapidly. We see agile as a key enabler, but we don’t know where to start.</td>
</tr>
</tbody>
</table>

#### Approach Comparison

<table>
<thead>
<tr>
<th>Aspects / Criteria</th>
<th>Scrum-of-Scrums (SoS) PO meta-scrum</th>
<th>Large Scale Scrum (LeSS) Larman/Vodde</th>
<th>Scaled Agile Framework (SAFe) Leffingwell</th>
<th>Discipled Agile Delivery (DAD) + Agility at Scale Ambler/Lines</th>
<th>Spotify “model” (Tribes, Squads, Chapters &amp; Guilds) Kniberg</th>
<th>Scrum at Scale Brown/Sutherland</th>
<th>Other...</th>
</tr>
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<tbody>
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</tbody>
</table>
Share experiences or questions about scaling approaches with others at your table.

How might you use the ASK matrix in YOUR organization.
What else...

- www.agilescaling.org
- You’ll be able to download an editable version of the matrix.
- We’ll continue to add verbatim comments on the various frameworks to the website
- We just added a special area for comments from the authors
- We’ll continue to reference case studies about use of the different frameworks and links to other key articles and scaling sites
- Other frameworks will be added to a special page of the website
- We’ll continue to evolve the matrix and the site based on what YOU, the Agile Community, tell us
Conclusion

Q&A?

Thank You!

Join the community and contribute to the knowledge sharing at www.agilescaling.org

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