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Strategy Mapping:
Clear path to a successful Agile strategy

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Why are we implementing **agility**?

- It’s faster
- It’s better
- Higher quality
- More trust
- More productive
- The execs said
- My boss said
- My PMO said we could
- We want to
- We need to
- Let’s try it
- Speed to market
BUT
What’s in it for me?
And them?
And us?

AND
What’s it going to take?
We need a strategy!
A strategy describes how an organization intends to create value for shareholders, customers, and employees.
I still don’t get it!

Why are we going Agile?

Where are we starting?
We need a map!

How about a strategy map?
A strategy map is a general representation of a strategy that visualizes cause-and-effect relationships of actions and desired outcomes.

Kaplan & Norton Strategy Map Template

Kaplan & Norton Strategy Map Template

Financial Perspective
- Productivity
- Long-term Shareholder Value
- Growth

Customer Perspective
- Product / Service Attributes
- Relationship
- Image

Internal Perspective
- Operations Management
- Customer Management
- Innovation
- Regulatory / Social

Learning & Growth Perspective
- Human Capital
  - Skills
  - Training
  - Knowledge
- Information Capital
  - Systems
  - Databases
  - Networks
- Organization Capital
  - Culture
  - Leadership
  - Alignment
  - Teamwork
Strategy Map Example – IT Organization Level

Sustained shareholder value

- Manage unit cost of information technology
- Maximize business unit value creation
- Provide innovative opportunities

Competency
- Demonstrate a competitive cost model
- Deliver quality service
- Deliver quality solutions

Credibility
- Do the right thing at the right time

Contribution
- Achieve business unit strategies

Operational Excellence Perspective
- Manage IT as a business
- Manage service quality
- Effectively support end users
- Deliver on time and as committed
- Partner with others
- Improve business productivity
- Propose enabling solutions

Future Orientation Perspective
- Attract and retain skilled people
- Focus on career development
- Build strong leaders

Build a high performance culture
- Build process discipline
- Promote a culture of learning & innovation
- Acquire skills in enabling technologies & practices

Customer/End User Perspective
- Realize economies of scale
- Standardize platforms & architectures
- Optimize IT internal processes
- Manage risk w/ effective controls
- Understand business unit strategies
- Understand emerging technologies
- Drive innovation
I see strategy mapping working at the organizational level,

but how does it apply to agility?
Again, why are we implementing agility?

What value are we generating for shareholders, customers, and employees?

What knowledge and practices do we need to have?
Strategy Map Example – Agile Adoption

Financial
- Reduced Time to Market
- Increase Wallet Share

Customer
- Fast Feedback
- Iterative Delivery
- Product Vision
- User-centered Design
- Market research

Internal Processes
- Release Planning
- Team Formation
- Backlog Grooming
- Sprint Planning
- Story Mapping
- Product Planning
- Usability Testing

Learning & Growth
- Collective Ownership
- Cross Functional Teams
- Product Owner
- Scrum Master
- Lean Thinking
- Continuous Improvement
- Early Feedback
- Engineering Practices
- Automated Testing Methods
- Systems Thinking
Now its **YOUR** turn :) 

Let’s map an Agile Adoption Strategy
Strategy Mapping Process

1. Prepare map template & grab supplies
2. Identify financial objectives
3. Identify customer value propositions that drive financial objectives
4. Identify internal processes (practices) needed to deliver customer value propositions
5. Identify the knowledge, skills, and organizational elements needed to execute the internal processes
With a strategy map in hand…

now what???
A Picture is Worth 1,000 Words
Strategy Map – Macro Level Assessment

How are we doing?

- Financial Perspective
- Customer Perspective
- Internal Perspective (Processes)
- Learning & Growth Perspective (People)

Lagging Indicators
Leading Indicators

Strategy Map – Action Planning & Coaching

Visual management of tactical coaching and improvement activities driving outcomes
Incorporate actions into annual strategic plans (e.g. IT, biz, etc.)

3. Deliver on time and as committed
   a. Improve our project management practices and methods to include better estimating, planning, and execution control
   b. Improve our expectation management with the business for projects, maintenance, and support by defining clear SLAs, using estimates and capacity planning to forecast release schedules
   c. Implement more structured Agile project management practices and processes
Strategy Map – Micro Level Assessment

Leading & Lagging indicators for all factors in the map
Agile coaching gets exponentially complex at scale
Strategy Mapping Summary

• Developed by Kaplan and Norton after the Balanced Scorecard to tie actions with outcomes being measured
• Simple model incorporates four perspectives: financial, customer, internal processes, and learning & growth
• Visualizes cause-and-effect relationships between actions and outcomes
• Applies at organizational (macro) levels and with sub-strategies (micro)
• Enhances communication, education, assessment, action planning and coaching
Done.

Happy mapping!

Questions?