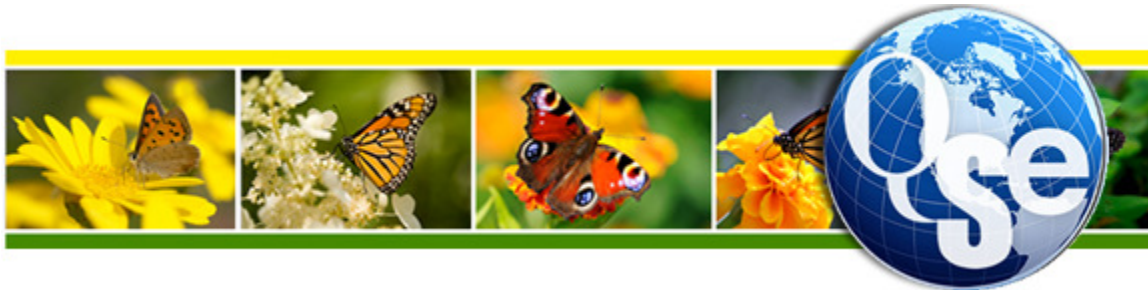


# Using Scrum to Complement Existing Organizational Transformation Methods: Exercise Guide

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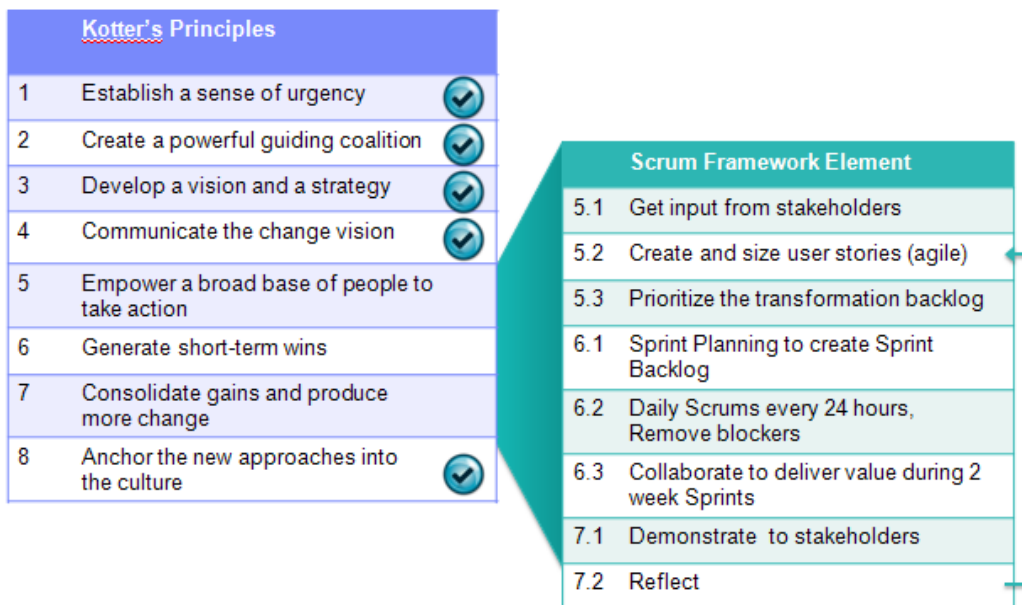
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## Introduction

Scrum can be leveraged with Kotter’s eight principles for leading change as shown in Figure 1 to provide a more structured framework to consistently empower a broad base of people to take action, generate short-term wins and consolidate gains and produce more change:

- For Step 5, empowering a broad base of people to take action, Scrum steps can be used to get input from stakeholders, create and size user stories (technically agile, not really scrum), and create a transformation backlog that is prioritized to ensure the transformation team is addressing the highest priority needs.
- For Step 6, Scrum steps of engaging in sprint planning, creating a sprint backlog, participating in daily scrums and delivering value every two weeks can help to consistently generate short-term wins.
- For Step 7, Scrum steps of demonstrating to stakeholders and reflecting on how the transformation team can improve their efforts can help the team to consolidate gains and produce more change.

Figure 1. Integrating Scrum with Kotter’s Eight Principles



## Exercise 1. Identify Your Stakeholders

To empower a broad base to take action—to make progress in achieving the transformation—we have to understand their needs. How can we empower them? We begin with getting input from our stakeholders.

1. Who are they?

A. Principals are people who control the budget and resources. **Who are your principals?**

B. Insiders are the people working together to build a product or, in our case, to create the transformation. **Who are your insiders?**

C. Partners invest resources because they expect to profit from their investment. They engage with the transformation team because their organizations expect to get significant value from the deliverables. **Who are your partners?**

D. End Users are those who are directly impacted by the transformation effort. Their practices and processes are changed by the effort. **Who are your end users?**

2. How do you collect feedback from your stakeholders?



### Exercise 2. Create a User Story for Transformation

- 1. The user story format for requirements or work items takes the approach of “Who needs to do what and why.” Mike Cohn provides a template of “As a <role>, I can <goal> so that <business value.>”

Identify a user story that you might expect to address, based on your current knowledge of your stakeholders’ needs.

- 2. A user story also includes acceptance criteria or “confirmation.” Acceptance criteria identify what the team must which the stakeholders will use to validate that the user story has been implemented correctly.

Examples of acceptance criteria

| “Done” Criteria             | Description of Elements that Must be Addressed   |
|-----------------------------|--|
| Definition of deliverables  | What will be delivered to address the need (education module, coaching, experience reports, etc.)? |
| Metrics                     | How will you measure success?  |
| Community activities        | How will you engage the community to create, test, and build awareness of the deliverable          |
| Communications              | What is the communications strategy over time—before, during, after delivery?                      |
| Demonstration of leadership | Can this deliverable be leveraged to give the community members and business recognition?          |

What are your acceptance criteria?

### Exercise 3. Prioritization Criteria

1. One of the things that can help you in prioritizing your backlog is identifying the criteria by which you'll make your decisions.

| Example Criteria                                 |
|--|
| Aligns with our organization's mission           |
| Requested by our stakeholders                    |
| Impact across the business units and brands      |
| Impact across geographies                        |
| Investment level                                 |
| Expected return on investment                    |
| Support of other key strategic initiatives       |
| Expected return on investment (ROI)              |
| Availability of Subject Matter Expert Volunteers |

What criteria could you use to prioritize your transformation efforts?



## Exercise 4. Sprint Planning

1. Just like when you use Scrum for software development, you will engage in the same process to engage in Sprint Planning for transformation efforts. Going into the planning meeting, you want to have a well-groomed backlog. As you're grooming your backlog, you may need to break down the work to fit within a two-week Sprint, just as you do when you're using user stories for software development.

Disaggregate one of the transformation user stories that you created in Exercise 2.

2. During Sprint planning, you will take the stories and split them out into tasks. Create tasks for your transformation user story

## Exercise 5. Demonstrate to Stakeholders

We've talked about empowering a broad base to take action and we've talked about generating short-term wins. Now we'll turn our attention to consolidating wins and creating more change. This is about bringing the parts—the various deliverables—into the whole—the overall transformation effort—and looking at the bigger picture to identify additional change required across the business. It's critical that we demonstrate what we have done to our stakeholders, get their feedback and give them a chance to, as necessary, absorb that change into other areas.

One level of demo that we have is a demo with the target audience (end users) for the deliverable itself *during* the Sprint. This is typically done with enough time left to react to the feedback.

Another level of review happens during our end of Sprint demos. During those demos, we confirm that the overall transformation story is complete.

Which stakeholders will you invite to your demos?

How will you demonstrate progress?