Agile Roles and Beyond

By Mario E. Moreira
Objectives

- Quick overview of Agile
- Roles that are Core
- Roles that are Beyond
- Learn the view and motivation of each role
- Learn the specific tasks that each roles plays throughout a release and within each sprint
Welcome!

- Mario Moreira, Agile Champion and Innovation leader at CA
- Writer and Columnist for the “Agile Journal” and “CM Journal”
- Working in the Agile field since 1998. A certified ScrumMaster having implemented Scrum and XP at the product and organizational levels.
- Author of a new book “Adapting Configuration Management for Agile Teams” 2010 (via Wiley)
- Author of “Software Configuration Management Implementation Roadmap” 2004 (via Wiley)
- Writer of the CM for Agile Blog
All Roles in Agile

- **Core**
  - ScrumMaster
  - Agile/Scrum Team
  - Product Owner & Customers

- **Beyond**
  - Executive/Sr Managers
  - Functional/Resource Managers
  - Agile Coach/Mentor
Chickens and Pigs

- Analogy of eggs and bacon breakfast
- “Pig” are the ones committed to the project in the Scrum process – they are the ones with “their bacon on the line” and performing the actual work of the project
- “Chicken” are not part of the actual Scrum process – “they lay the eggs”, but often are not responsible
- “Fox” are those that disrupt the project work and sometimes steals resources
All Roles Need to Have an Agile Mindset*

- **Think small**
  - See things in chunks, modular
  - Gain the ability to refactor
- **Think business value**
  - Consider business value of functionality
  - Deliver value
- **Think continuous**
  - Welcome change
  - Connect all “thinks”
- **Think self-empowered**
  - Different from command–and–control
  - Push decisions to the lowest level where it is known
- **Think collaboration**
  - Listening closely
  - Working together across roles to build solution

*From “Adapting Configuration Management for Agile Teams” By Mario E. Moreira*
Understand Agile Personality Types

- Innovator
- Champion
- Workhorse
- Bandwagon
- Cowboy
- Deceiver
- Denier

*From “Adapting Configuration Management for Agile Teams” By Mario E. Moreira
Partnership of Business and Technical

*Build the right thing!*  *Build the thing right!*

(Validation)  (Verification)

Customers  Team  Code, H/w

Agile management practices  Agile technical practices

Lean-Agile Partners
Agile Role Map

Customer

Product Owner

ScrumMaster

Agile Scrum Team

Agile Coach

Execs / Sr Manager

Managers
ScrumMaster
ScrumMaster Overview

- Team player
- Implement Scrum method, values, and practices
- Acts as “servant-leader” of the team
- Does not assign work to the team or on behalf of the team
  - Encourages team to volunteer for the work
- Does not “manage” the team in the traditional sense
ScrumMaster Role on a Scrum Teams

Difference between Traditional Teams and Scrum Teams

Traditional Team

- Command and Control
- Centralized
- Assign work

Agile Team

- Facilitative
- Decentralized
- Motivates volunteering

SM - Scrum Master
ScrumMaster Horizon

- Exec
- PM
- PO
- Scrum Master and Scrum Team

- Strategy: Many Years
- Portfolio: Years
- Product: Year
- Release: 3-12 mon
- Sprint: 2-4 wks
- Daily: Day
Tasks for the ScrumMaster

- Facilitates the Agile Release Planning session
- Facilitates the Sprint Planning session
- Facilitates Daily Scrum and maintains the Sprint Backlog
- Facilities the Retrospective
- Removes roadblocks and impediments
Scrum Team
(aka, Agile project team)
Scrum Team Overview

- Typically about 7–12 people
- Cross-functional (e.g., developers, architect, testers, design, technical writer, CM/build engineer)
- Commitment should be full-time for each member
  - Can change in between sprints
  - May be limited exceptions (e.g., technical writer, CM/build engineer, etc.)
- Team should be self-organizing
  - Should volunteer for work
  - Should be assertive
Scrum Team Horizon

- Exec
- PM
- PO
- Scrum Master and Scrum Team
- Strategy
- Portfolio
- Product
- Release
- Sprint
- Daily
- Many Years
- Years
- Year
- 3-12 mon
- 2-4 wks
- Day
Tasks for the Scrum Team

- Participates in Agile Release Planning
- Participates in Sprint Planning
- Develops software and applies Unit tests
- Applies appropriate configuration management practices
- Initiates functional and integration testing
- Writes user documentation
- Attends the Daily Scrum
- Leads the End-of-Sprint Review
- Participates in the Retrospective
Product Owner
Agile Product Owner Overview

- Understands clearly that it takes teamwork to produce success
- Needs to keep development informed and productive by being continuously available
- Develops user stories
- Carves up a feature into meaningful stories
- Defines sprint goals and makes sprint decisions
- Showcases demos to customers
- Accepts or rejects work
- Focuses on return on investment
- Final authority to represent the customer interest (aka, Voice of the Customer – VoC)
PM & Engineering Communities

Old world – disjointed communities

Agile world – bringing communities together

Product Owner partly grew out of the great distance between PM and engineering and the lack of unfamiliarity with project management

Per Agile PM/PO Dilemma - Rich Mironov
Tasks for the Product Owner

- Continuously meeting with customers and collecting requirements/stories
- Establish customer profiles
- Manage and groom the Product Backlog
- Drive the Agile Release Planning session
  - Prioritize stories for release
  - Define release goal(s)
- Participate in the Sprint Planning session
  - Clarify stories
  - Define sprint goal(s)
- Participate in End-of-Sprint Reviews
Challenges of Product Owner in Agile

- Committing time to both Agile team and customer
  - Being out there with the customer
  - Being readily available to the Agile team
  - Sharing/delegating part of the role with others

- Iteratively (and frequently) collecting requirements/stories from multiple customers
  - Collecting consistent stories across customer base
  - Prioritizing across different customers

- Getting Customer involvement in the Agile process
  - Getting the customer available for End-of-Sprint review

- Being asked for upfront estimation planning
  - Estimating dates can be hard when uncertainty exists
Customers
Customer Overview

- Understand the importance of relationships with vendor (aka, Product Owner)
- It takes teamwork to get a value–added product and releases
- Participate in the End of Sprint reviews, provide feedback on demo and provide any addition requirements
- Learn to specify requirements using the story language construct (e.g., canonical form)
Beyond...
Executives and Senior Management
Executive and Management Overview

- Understand that Agile is here to increase revenue by building something the customer actually wants
  - This is more important than schedule and cost

- Focus more on the flexibility of scope to ensure we are meeting customer needs
  - Avoid locking in scope but instead locking in cost
  - Schedule may be fixed unless the customer wants it sooner

- Ensure the business governance supports Agile and does not hinder its benefits to the organization

- Possess a strong understanding of Agile and the partnership of business and technical
Roles & Their Planning Horizon

- Exec
- PM
- PO
- Scrum Master and Scrum Team
- Strategy
- Portfolio
- Product
- Release
- Sprint
- Daily

Many Years
Years
Year
2-12 mon
2-4 wks
Day
Executive/Sr Management Tasks

- Sit **quietly** while attending the End-of-Sprint reviews
- Attend the intro section of the Release Planning session (or present Business Context during this session)
- Ask your teams how the Agile practice make us more responsive to the customer?
- Be available to remove roadblocks
  - Ask for an Impediment backlog to help resolve problems
- Become an Agile champion
- Establish an Agile status report or balanced scorecard based on Agile measures
  - View and understand release and sprint burndowns
- Look for people who want to lead others, not command others
Managers
(Resource, Functional, etc.)
Management Overview

- Understand that Agile is here to increase revenue by building something the customer actually wants
  - This is more important than schedule and cost
- Ensure you are providing your team with support in the Agile space (e.g., training, etc.)
- If your resource is on a Scrum Team, do not assign them work
- Possess a strong understanding of Agile and the partnership of business and technical
Management Tasks

- Sit **quietly** attending the End-of-Sprint reviews
- Attend the intro section of the Release Planning session
- Ask your teams how the Agile practice make us more responsive to the customer?
- Be available to remove roadblocks
  - Ask for an Impediment backlog to help resolve problems
- Become an Agile champion
- Learn to understand the standard Agile status report (e.g., release and sprint burndowns)
- Look for people who want to lead others (ScrumMaster, not command others)
Agile Coach/Mentor
Agile Coach/Mentor Overview

- Understands the ins and outs of Agile methodologies
- Has implemented Agile methods and practices on a variety of product teams and organizations
- Provides strong consultative skills in helping teams improve their Agile level
- Possesses a strong understanding of Agile and the partnership of business and technical
- Ensures you are providing your team with support in the Agile space
Agile Coach/Mentor Tasks

- Provide training to product team on methodology and practices
- Help build out a product team or organization
- Support the deployment of the methodology and practices on product teams
- Assess teams on their Agile level and readiness
- Coach ScrumMasters and teams on ensuring Agile principles are remaining intact
Summary

You should now be able to:

- Identify the key roles in Agile and Scrum
- Know where in the planning horizon they each play
- Understand the view and motivation of each role
- Know the specific tasks that each role plays throughout a release and within each sprint
Wrap-up

Any remaining questions?

Thank you!