Getting Starting with Scaling

Version 5

This is a whitepaper on scaling. It has three sections (so far):

1. Question. We address a question we received on where to start with scaling.
2. What is Scaling? (Scaling Terms). We identify and define some key related terms.
3. "Don't Do It!" We discuss the option of not doing any scaling. (Or, implicitly, of doing less Scaling.)

Question

> "We are starting Scrum. We have the kind of projects that require scaling. But <u>how</u> do we start with Scrum and have some scaling?"

The first thing to say is: The basic framework of Scrum does not attempt to answer this question. It assumes you will use lean-agile-scrum principles and values, and devise your own, specific solution to this problem.

Still, the Scrum community has dealt with this problem many times. Here are some good ideas to start with. (Later, we will get to more complex aspects.)

Let's assume:

- You are talking about putting 3 teams together to work on one project.
- To release roughly every 4 months.
- Each team is about 7 people, including the PO and the SM.
- We continue to focus on Team success. Meaning: We realize that the core of activity is inside the Team. If each Team is not 'working', then no amount of scaling is going to help. So, the Teams are real teams. Each person is 100% dedicated to one Team.

OK, now you have some of the basics. Let's talk about scaling...

1. Chief Product Owner. Each team has a product owner, and, in addition, there is a Chief Product Owner -- who manages the Master Product Backlog for all 3 teams. So, the CPO is not dedicated to one Team, but to all 3 teams.
2. Product Owner group. The CPO and the 3 POs all work together. They meet daily, in a separate quick daily meeting, Like a 'daily stand-up' (brief, 15-minutes). To be sure things are coordinated from the business

side across all 3 teams. Similar to a 'scrum of scrums' (see below). Make the meeting short and effective.
3. Scrum of Scrums. SoS. This means a Daily Scrum across all 3 teams. Specifically, each Team does the usual Daily Scrum. Then, at least one person from each of the 3 teams comes to the Daily 'Scrum of Scrums'. The questions are:
(a) what did your <u>team</u> get done yesterday,
(b) what will your <u>team</u> get done today, and
(c) what is your <u>team's</u> biggest impediment.
A Scrum of Scrums Master facilitates this meeting. And helps address the impediments.
4. Scrum of Scrums Master. There are a few ideas about who this might be. It could be a manager who is not on any Team. It could be one of the ScrumMasters on one of the Teams. Etc. But this person becomes the 'impediment-remover-in-chief' for the impediments identified in the SoS.
5. Technical Issues. The main work of the SoS is to remove technical impediments. If a business side impediment is high, that might be given to the Product Owner group to address.
6. Continuous Integration. To have scaling across 3 teams, it quickly becomes very important to have much better CI (continuous integration). This is true also with just Scrum for one team. But becomes extremely urgent with scaling with 3 teams, because they are all playing in the same code base.
7. Attendees at the SoS. The initial idea is that the SMs from each team would form the SoS. This works fine sometimes. Other times, the SoS works much better if the best technical person from a team attends. Use common sense (which is uncommon).
8. Focus on the Teams. It is apparent that, as soon as you have a 'superstructure' of scaling, people lose sight of the Teams and focus on the superstructure. Do not fall for that temptation. (Ok, fall for it less.) Of course, this is quite easy to say, and far harder to do. Again, everyone should focus mainly within the Teams, and on what each Team produces, as much as they possibly can.

Those few ideas should get you started.

What is Scaling? (Scaling terms)

The word scaling is used a lot in many different ways.

Below are several key terms used often when we discuss 'Agile Scaling.'

Our experience is that when the Agile-Scrum community talks about these issues, they use these words in a very loose way. The problems behind these words are quite real. And can at least be somewhat improved if we work hard and use the best ideas. But the lack of clarity in the word usage gets in the way of good communication and good thinking. And then the actions are muddled.

Let's review these terms:

- Scaling
- Broader Agile Adoption
- Agile Transformation
- Cultural Change
- Distributed Agile or Scrum

Here are my definitions.

Scaling

We want scaling to mean only having multiple [Scrum] teams working together on one Product. In some sense, they are 'in the same code base' if it is a software product. Two teams working together is one kind of problem. 3-7 teams is one kind of problem. 8+ teams is another kind of problem.

Broader agile adoption

This means (to us) adding more and more teams to the teams currently using Agile. Or converting new departments or divisions to Agile. For purposes of this idea, assume that each team is working completely independently (ie, no scaling as defined above).

Note however: If your group is very big (say 100 people?), our experience is that usually you will have some scaling as well -- as defined above (ie, several teams working together on one product).

Agile Transformation

This means having the whole organization become truly agile, in values, principles, and practices. Not just the 'development' or IT or Technology department (or whatever name your firm uses for that group). This often covers many different kinds of issues. Of course, just introducing Scrum to a few teams almost inevitably leads to a kind of 'transformation'. Scrum tends to affect, as we say, 'everything.'

Even a small company with one Scrum team will have a kind of Agile Transformation. A company of 100 people will have a more complex Agile Transformation. And then a company of 300,000 people might have a far more complex Agile Transformation.

Often this term is used to encompass 'everything'. Meaning, all the changes needed in a big company 'going agile'. 'This is our Agile Transformation initiative' is a sentence one could hear. The problem is that those two words may mean lots of different things to different people. Even with our relatively narrow definition, it starts to mean too many disparate things.

Cultural Change

This is where the culture of your group (team, department, company) must change because of Agile, or to make Agile more successful. This is almost always needed to some degree with most any of these other changes.

Again, cultural change is often assumed in the phrase 'agile transformation'. This is understandable. But I think the discussion and thinking is better is we separate Cultural Change from Agile Transformation.

At least in theory one can imagine a situation in which no cultural change is really required -- the firm though could still need an Agile Transformation in terms of hierarchy, incentives, HR things, ways of managing, etc.

It is useful to think of the culture change as a separate issue. As we are seeing, all these different things interrelate. This is in part why the words have been mushed together.

Distributed Agile or Scrum

This covers two situations:

(a) one team has members in more than one location. In fact, if people are on two different floors, that is a 'distributed' team. Often distributed means that at least one person is in a different time zone than other people on the team. And, typically, the wider the time zone split, the worse the problems.

(b) two or more teams must work together, and each Team is in a different location.

And of course we can have the combination of (a) and (b).

You might want to call (a) distributed team and (b) distributed agile.

I also use the term 'disbursed agile' to mean a team where no two people on the team are in the same place (no two people are collocated). I find 'dispersed' to be particularly hard to deal with. At least when compared to collocated.

Many people assume that 'distributed' is the biggest problem in scaling (or agile transformation -- whichever their favorite word is). And yet many firms can be

doing scaling or agile transformation without doing any distributed agile at all. And scaling is still a problem.

***

Maybe there are more terms to add to this list. And maybe these definitions can be improved.

But, to take action, we must describe our problems and propose solutions. The better we can describe that, with common language, the better our actions will likely be.

The "Don't Do It!" Option

These days people talk about Scaling a lot, and one can get the impression that one must do it.

They say that only truly professional Teams try complicated plays. Or should try complicated plays. Most 'lesser' Teams do well to stick to basic blocking and tackling. I think this is wise advice for many teams.

Scaling by its nature is complicated. It is attempting the impossible, in a way. It is attempting to keep a large 'blob' of people fully informed about what each other is doing. And to get them to be effective together. No, not 100% informed about every detail, of course, but 'fully.' Meaning: I, as a member of the blob, know everything I need to know to be effective (and enough not be counter-productive) about anything that anyone else in the blob is doing.

This is impossible. Hence, scaling is always and everywhere a mess. That it, it inherently has problems.

Human communication is very difficult in a Team of 7. Just about impossible in a blob. Unless the blob is extremely slow moving. Which of course is what blobs naturally do, they move slowly.

So, how about this? Instead of 50 people in 7 teams, let's take the 'best people' from that blob, and make one Super Team. The hard part is finding 'super' team players (people who will play well together). Or maybe better to say: The hard part is appreciating the value of being a team player over having a so-called 'extraordinary skill-set' (usually a specific skill or knowledge domain in our business). We all have seen that a bunch of high-ego people that won't work together well.

Still, think about forming your Super Team.

Maybe the other people (of the 50 you were considering) can be useful, but the first rule is 'do no harm.' Get them the heck out of the way!! And let the Super Team run.

Can these other people do anything? Well, yes: mow the grass. Honestly, they can do some 'spade work' that never gets in the way of the Super Team. They can do things that enable the Super Team to go faster. They can prepare things. But the key thing is to optimize the speed of the Super Team. (Other things being equal.)

It's an alternate idea. From a business point of view, often faster, cheaper and higher quality. And higher innovation.

Will this approach work well every time? Not sure; probably not. But often I think it is the best option available. In part because speed of delivery is so important, and in part because it is so common that, by having a blob of people, it just slows things down to a crawl.

If you have an overall people situation where you can get an elephant to dance, and be nimble and move quickly, god bless you and tell us all how you did it.   But how do you know the Super group would not have been faster?

I tease you with this question not because I know from a distance that I am right about your situation. Of course I cannot know that. But I tease to make you think. I am sure I would recommend scaling myself in some situations.

The other key conclusion: the problems of scaling start with communication across the whole blob. How do we do that in an effective way? How do we do that so that our knowledge workers remain motivated and innovative?

Resources

The following resources may be useful.

http://www.scrumplop.org/

http://www.craiglarman.com/wiki/index.php?title=Large-Scale_Scrum

http://www.infoq.com/articles/large-scale-scrum-jomorgan

http://www.crosstalkonline.org/storage/issue-archives/2013/201305/201305-larman.pdf

http://www.amazon.com/Scaling-Lean-Agile-Development-Organizational/dp/0321480961

http://www.scruminc.com/scaling-scrum-what-people-are-not/

http://scaledagileframework.com/

Additional topic to be added:

- Additional core patterns.
- Quick review of main 'schools' of scaling
- Scaling and related topics

Contact us:

Joseph Little

jhlittle@kittyhawkconsulting.com

LeanAgileTraining.com

(o) 704-376-8881