Agile Maturity Facilitator Instructions

- Assessments should be conducted at least once every 6 months.
- Determine which assessment the team requires; Scrum or Kanban and choose the appropriate assessment to facilitate. The only difference is in the agile principles dimension.
- You will assess current state in one 90-minute session and set targets in another 60-minute session.
- You will need to project the assessment document for the team to ensure you have the appropriate set up
- Printed handouts are optional
- The team will need sticky notes or a tool like planitpoker to vote (similar to planning poker). You may also use a tool like surveymaker or Skype polling.

Assessing Current State

- Live Facilitation:
 - Review the power point with the team to introduce the assessment.
 - Review the Dimensions with the team on the first page of the assessment handout.
 - \circ On the results page focus on the Levels (0 4). The team will be using these to vote.
 - Let the team know that they should choose the lowest number that is applicable even if they have behaviors from multiple levels across the team. All behaviors from the identified level should be eliminated before they go to the next level.
 - Walk through the first one with the team (Agile principles Visualization). Read the level descriptions and ask them to vote independently.
 - It is important to note that to move to the next level the team will need to have removed all displays of the previous behavior. This means if there is one person on the team still exhibiting that behavior then the whole team is rated at the lower number.
 - After the team votes discuss the outliers. You want the team to come to consensus but if they cannot then the lower number should be applied to the current state.
 - Move on to the next item (Agile principles Prioritization) and allow the team to read through the options on their own.
 - Ask them to vote independently and again discuss outliers trying to come to consensus. If the team cannot agree then apply the lower number.
 - Repeat this for all topics in the agile principles/team dynamics/tech processes sections in the assessment.
 - For the Organizational dynamics use the majority as the team score but document how many votes for each level (this will be documented on the master sheet to trend individual responses). Please ensure to collect feedback as to why the team members voted the way they did. This is very important for this section as the feedback will be used to help the organization better support agility.

Setting Targets

- After the assessment of current state is complete you will move on to set target state in a minimum of two areas.
 - Focusing on the Agile principles, Team Dynamics and Technical management dimensions, ask the team where they feel they can get the most value from setting an improvement target (organizational dynamics are outside the team's control).
 - The team can pick more than 2 areas to improve but be careful to not take on too much.
 - Once they have agreed on the areas ask them to propose a level to aspire to.
 - Once the level is determined ask them to determine a time frame in which they feel like they can achieve the improvement. This should be no longer than 3 months.
- Set up a follow up meeting based on the time commitment and add the improvement items as an agenda item in the team's retrospective so they don't lose sight of them.

Tracking results

- The results should be captured in a spreadsheet that is accessible to the team and the Agile Coach.
- Enter in the score for the team and continue to compile each following assessment in the same chart so the team can see their trends.
- Create a radar chart with results from the first and second session to visualize differences
- Multiple teams can be rolled up to get a picture of the org or program.
- \circ $\;$ The average can be applied to get an overall picture of where the organization is at.

Facilitator Notes

Why is important?

- Visualization: When we can see all work in one place it enables us to get a better perspective of all things being worked on so we can relatively prioritize the work. It enables teams to make decisions quickly and focus on the right work. Visualization also increases collaboration and reduces redundancy.
- Prioritization: Maximizing value is the goal of the team so prioritizing the most valuable items will benefit the customer and organization.
- WIP/Workflow: When we have a high amount of work in progress, we need to context switch which causes loss in productivity and quality. It also increases the risk of not getting important work done. By focusing on a small amount of work the team can collaborate to ensure the most important items are completed by the end of the sprint, therefore maximizing the value delivered. This helps to reduce silos within the team and helps the team to share knowledge.

- Continuous Improvement: This is aligned around the 3 pillars of Scrum, Transparency/Inspection/Adaptation. Teams should frequently review how they are working to ensure they are maximizing productivity. They should experiment with new processes and try to continuously improve the way they work together as well as with other teams/customers.
- Feedback Loops: Feedback loops allow us to ensure we are consistently inspecting our products and our process to continuously improve them. Without this we may have products that do not satisfy our customers.
- Predictability: Predictability enables us to be able to plan and coordinate work better as well as set customer expectations on delivery and any necessary customer involvement.
- Collaboration: Ensuring we deliver value to the customer is key. Without collaborating with the customer throughout the development process we can end up building the wrong thing and not meeting customer expectations. This causes re-work and poor customer experience.
- Framework: The Scrum framework facilitates collaboration, transparency, inspection. Using the framework the way it is prescribed can help us to maximize our productivity, improve our communication, and ultimately ensure our customers are getting the value items they need from the team.
- Teamwork: The Agile frameworks are designed for teams. If we are individuals that are not aligned to a common goal, the frameworks may seem like they don't fit. We need to work toward becoming more of a team to get the most value from Scrum or Kanban.
- Trust: When the team trusts each other, they are better able to collaborate and learn from each other.
- Conflict management: Conflict can severely impact a teams' ability to deliver. Being open to conflict and being able to resolve it in a positive way is important to the overall success of the team.
- Work balance/satisfaction: work/life balance is very important for the overall health of individuals and the team. If we are not able to work at a sustainable pace we can get burned out, become ill, and make mistakes. In addition, it is important that our work keeps us engaged and stimulates innovative thinking.
- Quality: Quality enhances customer satisfaction and reduces re-work.
- Technical Debt: When a team acquires technical debt, it becomes very difficult to manage a system. It also introduces risk and can impede delivery of customer requests. We should always be focused on technical excellence even if it means it will take longer to deliver.
- Definition of Done: The definition of done ensures the team has the same level of expectations in process for completing a story. Examples of items that would be found in a definition of done are; peer reviewed, documentation complete, change ticket submitted, po sign off. The DoD should be able to be applied across stories and is not the same as acceptance criteria which is unique for each story and defines the scope.
- Simplicity: The art of maximizing the amount of work not done is an agile value. The teams need to focus on just in time requirements and building only that which is valuable. This includes identifying MVP and looking for ways to simplify existing solutions.

- IT Leadership Support: We measure how the leadership of Scrum teams supports their way of working because we need this leadership group to be advocates for the teams, to remove organizational impediments, and lead by example. Without leadership support agile teams cannot be successful.
- Resourcing: We measure dedication of teams because when we dedicate people to multiple projects or teams there are several negative impacts. We lose productivity due to context switching. We lose team centricity as project work begins to silo teams. We lose the effectiveness of making sprint commitments as a team when individuals have their own responsibilities.
- Customer Support: We measure customer support as the customer is critical to the success of the teams. When the business is not working in an agile way you often see that response times are delayed, and the team is not able to reach their maximum potential. It is important to make this transparent so we can begin to shift the culture and the way IT and the business collaborate.
- Business value: Understanding the goals of the business is very important. We do not want a "build it and they will come" mentality as that does not produce value. It is also important that when there are multiple customers that we plan together and prioritize the work relative to what's most valuable for the organization rather than the individual customer. If customers all have competing priorities, it is difficult for agile IT teams to prioritize work and minimize the amount of work in progress.
- Project Management: It is important to have a method for managing project that allows us to deliver iteratively and re-baseline as we learn and negotiate with our customers. It is also important that we use agile methods of estimating effort on projects to determine delivery timelines using velocity and empirical process control.