AGILE CARPENTRY

FORGING CHANGE

AGILE RESTRUCTURING IN PRACTICE

JAMES CARPENTER

James Carpenter

Forging Change

Agile Restructuring in Practice

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For my wife
Deirdre Carpenter

My parents
Joe & Marjory Carpenter

And my grandmother
Sue Carpenter

Foreword

To paraphrase Ronald Reagan, it isn't so much that managers are ignorant. It's just that they know so many things that aren't so. We build our organizational structures on assumptions that, because of changes in the type of work we do or because they were never true to begin with, are provably false.

Agile is one response to this disconnect. Some of those who experienced the problems so common in large organizations developed alternative approaches—understanding, at least intuitively, that there must be a better way.

One of the most fascinating aspects of agile and the many related frameworks is the deep set of knowledge they are based upon. This knowledge is extensive and well researched. Unfortunately, many if not most managers in a position to design an organizational structure and see it implemented are not well versed in this subject. More difficult still is the fact that many large companies seem, on first glance, to be doing quite well. If money is flowing in, why change? It is the age-old problem: degrees of separation changing data into story. The employees understand exactly what's happening but they exist far from the tip of the pyramid where the power lies. Each level in the pyramid makes adjustments to the data, all for pragmatic reasons, and in the end the truth gets hidden under an avalanche of equivocation.

At the heart of agile is the attempt to build in the adaptability needed when things do change and the old model stops working. This change can be environmental or internally generated as a result of years—decades—of deterioration in the organization. Far too often organizations wait until the signs of change are obvious, at which point it's probably too late to change to meet the new challenge. This is essentially the unstated bet many managers are making—that they can change sufficiently, and quickly enough, after the new facts on the ground are incontrovertible. The euphemism "fast follower" refers to a firm that doesn't need to be on the bleeding edge, but will allow other companies to chart a course they

can follow. However, even following requires adaptability. No company has unlimited time or resources to adapt, and yet that is the implicit assumption upon which many managers build their strategy. This isn't a good bet to make.

The question is, what do companies do about it before the change is required—how do managers shift focus to the methods that are known to produce better outcomes and more adaptable organizations? Implementing agile practices and organizational structures is an obvious answer—and the one currently in vogue. This new buzz has positive and negative implications for the movement. On one hand, more people are hearing about other ways of working, and that can only be seen as a positive. On the other hand, there is the same issue any new business fad faces: in order to go broad in appeal, the essence of the change is perverted to avoid the difficult bits.

Fortunately, perhaps, the actual mechanics of "being agile" are quite simple. I say "perhaps" because it's not always clear that simplicity makes things simpler to do. Often, simple, well-founded advice is the most difficult to put into practice because it isn't overloaded with the theatrics so often associated with large-scale change efforts. At its core, agile is about how people in complex environments work best, and that model is fairly simple to explain.

The delta between knowledge and practice—or rather, what people think they know versus what really works in practice—can be vast. Many of the consultants and experts in agile are simply selling something. They will often sell whatever meets with the desire of the manager paying the bill. All too often this is merely a veneer of change and not real, fundamental change in the organization. This isn't a problem unique to agile adoptions; it afflicts any change initiative.

James and I met, as many professionals do today, online. I was on the hunt for an agile coach to help with a large-scale transformation and had asked my contacts for recommendations. James was unique in that he provided examples and documents on his thinking. This is rarer than one might assume. Save for a few in the field who've published books, many consultants just talk, with little documentary evidence of what they

believe. This is no doubt because they are selling something and it's best not to prejudice oneself before the sale is made. Much of what James provided was the material that would eventually become this book. I appreciated the opportunity to better understand what he believes without the normal dance of a buyer and seller, where inevitably the seller feels compelled to tell the buyer what they want to hear. James's views of organizational change are rooted in both his personal experience as a developer and a study of the available research. This also is, unfortunately, rarer than one might assume.

In *Forging Change*, James provides an overview of the changes necessary for an agile adoption, with a particular focus on the teams and on specific advice informed by his years of experience. Although an agile adoption is an organizational change process, the work really only happens at the team level—without functioning teams an organization is unlikely to benefit from any kind of agile change effort. Some of the material in this book may be difficult to digest for some managers. As with any change effort, the discomfort is an indication that real change is happening.

If you are looking to change and adapt your organization for the future, be thankful you have the opportunity to learn from those who have been through change and know what's possible. It won't eliminate the difficulty of the journey you're about to embark on, but it will make it a bit more scenic.

David Stackleather

Introduction

If you are actively trying to evolve your organization into one which more fully embraces agile culture and practices, you deserve to hear the brutal truths without any sugar coating. In part 1 of this book I attempt to describe these truths as clearly as possible. I then go on to provide actionable guidance and conceptual models which can be used to achieve positive, lasting organizational change. I hope this will help you to more easily detect and articulate problems in your own organization's process and expectations.

Part 2 provides a loosely organized set of techniques, examples, and references you should find useful when practicing agile methods within your organization. In many cases a few paragraphs coupled with a few diagrams and tables are all that is needed to act as an effective reference for a topic.

I do not intend to provide yet another introductory book on agile process and techniques. Rather, I am trying to cut through the noise that often surrounds large-scale agile organizational transformations. Part 1 does this by reframing the problem from an actionable perspective. Part 2 is intended to help quickly establish concepts and terminology consistent with that new perspective.

I have provided a graphical chapter index at the top of most pages. I hope this will make quick reference easier while helping you discover chapters of interest.

A collection of chapter-specific reference content is available at http://forgingchange.com. The relevant link, along with a QR code to the same, is provided at the end of each chapter.

About the Author

James Carpenter started life as the son of a Texas dairyman and grew up to become a technologist. He spent the first fourteen years of his professional career as a software engineer, software architect, and engineering manager working in investment banking, e-commerce, and various dot-com startups. Since 2012 he has worked as an agile coach, helping both small clients and very large ones create agile ecosystems that produce greater business value, happier customers, happier engineers, and higher-quality products. Carpenter has a Bachelor's of Science in Physics from Texas A&M University.

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I was extremely fortunate to find my editor, DeAnna Burghart, via a reference from Robert Galen. Her previous experience editing similar books in the agile space resulted in exceptional, insightful edits, matched only by her overall professionalism.

Deb Tremper's design skills, knowledge of InDesign, hard work, and patient willingness to help me improve my own design skills greatly improved the quality of the book. I am also indebted to Linh Thoi for her excellent ebook conversion; I was lucky to find her.

Part I
Conceptual Foundations

The worker is not the problem.
The problem is at the top! Management.

W. Edwards Deming

1 Agile Deployment Models

Truth is often multifaceted, especially in the complex work of changing the culture of engineering organizations. Often, the more actionable, insightful facets are obscured by more politically palatable aspects with broader marketing appeal. This doesn't necessarily make the politically palatable aspects any less true; they simply don't provide a complete understanding.

1.1 STRUCTURE DRIVES GROUND-LEVEL CULTURE

At a high level there are at least two key leadership facets to agile adoption. Let's call the first *cultural leadership* and the second *structural leadership*. You will quickly recognize cultural leadership as the usual wisdom espoused in almost every management book. In contrast, structural leadership is very uncomfortable for many to discuss and therefore seldom given the emphasis and exposure it deserves.

1.1.1 Cultural Leadership

Cultural leadership refers to the insightful yet seldom controversial material you are likely already aware of. In many cases it is a bit too abstract to apply directly, unless something you read just happens to resonate with a specific challenge you are experiencing at that time.

- **Leadership Must Lead.** Executive management has an ethical and professional responsibility to establish clarity of organizational purpose, validate high-level mission intent, and model desired cultural values.
- **Management Books and Related Content.** Much has been written on cultural leadership:
  - » Various books by Dale Carnegie
  - » Various books by W. Edwards Deming
  - » *Great by Choice* by Jim Collins and Morten T. Hansen
  - » *Tribal Leadership: Leveraging Natural Groups to Build a Thriving Organization* by Dave Logan, John King, and Halee Fischer-Wright
  - » *How Google Works* by Eric Schmidt and Jonathan Rosenberg
  - » *Turn the Ship Around!* by L. David Marquet
  - » *Drive: The Surprising Truth About What Motivates Us* by Daniel H. Pink
  - » The Agile Manifesto (http://agilemanifesto.org/)

Cultural leadership is critical, and yet still insufficient to uproot legacy culture and replace it with a more effective culture aligned with an agile value system.

1.1.2 Structural Leadership

1.1.2.1 Management Broke It, Only Management Can Fix It

In my experience, ground-level culture is driven by structure far more often than structure is driven by ground-level culture. Many large organizations spend a lot of time talking about agility, transparency, and other grand ideals; yet the experience in the trenches remains rather oppressive and fails to model any of the ideals being espoused. Appropriate structural change produces radically different outcomes, with significant cultural change within a matter of a few months if not a few weeks.

There are several process frameworks aligned with an agile value system, any of which can provide a clear road map for better aligning structure to the nature of complex engineering work. One of the more successful approaches is Scrum with Extreme Programming–style engineering craftsmanship practices. Unfortunately, Scrum is frequently distorted, abused, and then maligned by management to obscure the underlying organizational problems Scrum exposed. The difference between successful and unsuccessful change efforts can often be traced back to how much executive management understood and actively supported the effort.

Most of the problems I see in practice have very little to do with lack of cultural leadership at the executive level. Instead, I see managers without any appreciation for or understanding of empirical process control, whose negative behaviors are reinforced by preexisting structural forces established and promoted by executive management. In other words, **management broke the organization and only management can fix it.**

1.1.2.2 Using Structure to Mold Culture

An executive manager who wishes to radically transform organizational culture must implement structure and metrics that hold managers accountable to an agile value system. Without appropriate structure and metrics, a significant number of managers will rapidly distort intentions in an effort to protect themselves from the emotional challenges of changing their behavior.

I am a strong believer in using the carrot more than the stick to motivate behavioral change. People generally rise to your expectations; expect the best and you will usually get it. Unfortunately, the legacy behaviors and personal value systems of about a third of managers are usually too deeply entrenched for the carrot alone to work. Consequently, it is important to implement accountability mechanisms that ensure a manager's personal pain of not changing is greater than the personal pain of changing. In my experience, unless an executive sponsor is willing and able to fire people there won't be enough leverage to uproot the preexisting culture.

1.1.2.3 Executive Values Drive Structure

When using shorthand, I frequently say structure drives culture. This is not completely accurate. Working backward a bit:

Current Organizational Problems
» *Current Organizational Structure*
» *Poor Executive Management Decisions*
» *Lack of Understanding in the Executive Layer*

From this perspective, even failures in structural leadership are the result of failures in cultural leadership. If you don't believe there is a general lack of understanding in the executive layer regarding the nature of software engineering and similar complex work and how to best manage it, I challenge you to read the first chapter of *The Principles of Product Development Flow* by Donald G. Reinertsen.

The first chapter of Reinertsen's Flow book is broadly available as free preview content in various formats. Reinertsen distributes a PDF at http://lpd2.com/downloads/.

You may insist the value system of executive leadership is the most critical thing. I agree. But this perspective does not clearly illuminate an actionable path to change. My primary interest is in affecting large-scale organizational change. Leaders can talk about organizational change and ideals all day long and nothing meaningful seems to happen. But adopting a structure aligned to agile values and then helping executive leadership hammer the organization into that mold inevitably yields rapid, positive change and produces radically happier customers, happier engineers, and higher-quality products.

1.1.2.4 Helping Managers Accept Change

In a traditional organization doing predictable work, ground-level employees distill and refine information so those higher in the organizational chart can make an informed decision. The presumption is that those higher-ups are better placed to make a fully informed decision that accounts for all the constraints the organization faces. These managers provide value to the organization by striving to make the best decisions possible and providing clear, actionable guidance to employees working at the ground level.

In other words, managers in traditional organizations primarily obtain a sense of self-worth and importance by going to lots of meetings and making important decisions affecting those who report to them. In an agile organization the role of a manager is much different, and the source of a manager's sense of self-worth must change.

Agile organizational design presumes that the work is far too complex for managers to make an ideal decision. Instead, agile managers are responsible for ensuring that those closest to the work have the information flows they need to make an optimal decision and removing any obstacles those closest to the work cannot remove by themselves. The sense of self-worth felt by agile managers is more like that of parents who are more proud of their children's accomplishments than their own.

This is a gross oversimplification, but it highlights why some managers find their organization's agile adoption so emotionally challenging to accept. In many ways middle management has far more to lose in an agile adoption than anyone else in the organization. They have spent years becoming good at things that are no longer highly valued. This is potentially terrifying, especially when you mix in concerns about providing for family and maintaining social standing.

I can make an argument that the emotional rewards and intellectual challenges for managers are greater in agile organizations than in traditional organizations. Even though this may be true, it still requires a leap of faith to give up a comfortable, well-understood situation for a much less familiar one.

Helping managers overcome their fears during an agile adoption requires both cultural and structural leadership from executive management. We must compassionately recognize the justifiable fears involved and help people develop the courage to move past them. At the same time, we must hold management accountable for change.

I believe that using traditional management techniques for complex project work such as software engineering effectively holds employees accountable for things outside their control. I also believe that executive management's moral obligation to ensure ground-level employees are treated fairly supersedes the needs of their middle managers to feel emotionally comfortable. So while executive management should compassionately and patiently support middle managers in their transition to an agile model, any manager who isn't making a good-faith effort to come into alignment must be actively moved out of the organization.

1.2 OVERVIEW OF AGILE DEPLOYMENT MODELS

There are several models for deploying agile within a large organization, and each has its strengths and weaknesses. This list uses my own terminology for the three primary models:

1. Attractor Change Model
2. Scrum Studio Change Model
3. Executive Pull–Based Change Model

These models are described in greater detail over the next few pages. Each one builds on the preceding models. For example, the Attractor Change Model emphasizes helping people only in areas where they want help. This continues to be a necessary and useful part of any transformation effort, even when the later, more advanced models are also in play.

Similarly, as a company transitions to the Executive Pull–Based Change Model, there will occasionally be a need to try out new techniques and metrics before applying them more broadly. The portion of the organization that initially executed in a Scrum Studio Change Model is often the best place to conduct those experiments.

You will likely recognize some of these models by other names. For example, I often hear a Scrum studio called a pilot, a bubble, or a walled garden. I even use these names myself at times. I have used the term *Scrum studio* here out of respect for Ken Schwaber and Jeff Sutherland, as that is the term they use in *Software in 30 Days*.

George Box famously said, "All models are wrong, but some are useful." I'm sure these mental models are wrong at some level, but I have found them very useful and actionable.

1.2.1 Problem Statement

Before getting into the details of the various deployment models, let us first remind ourselves of the overall goal of any agile deployment and the obstacles that must be overcome.

1.2.1.1 End Goal

Delight customers with frequent, high-quality production releases meeting the customer need.

1.2.1.2 Obstacles to Change

- Reinforcing feedback loops support entrenched behavior.
- Change threatens many people's sense of self-worth, especially those in management.
- Transparency is very uncomfortable. It is human nature to avoid discomfort.
- Managing uncertainty requires accepting and embracing it.
    - » **Embrace Uncertainty**: Use empirical process control to optimize outcomes.
    - » **Deny Uncertainty**: Continually be frustrated by inefficiency and failure.

1.2.2 Attractor Change Model

Success will naturally attract followers. Rather than attempt to radically alter people's mindset along with their organizational structure, focus improvement efforts where people are already eager to change. Promote awareness of any successful improvement efforts to help attract additional followers.

Pro:

- Builds support for additional change
- Largely avoids building resistance to change

Con:

- Seldom sufficient to fix institutionally entrenched anti-patterns
- Easily derailed as soon as anyone with managerial authority feels threatened

1.2.3 Scrum Studio Change Model

The concept of using an isolated bubble can be used to implement any desired reasonable agile process.

Establish a protected, volunteer-only part of the organization. All parties in this Scrum studio, including business and engineering, agree to abide by the rules of Scrum.

Pro:

- Studio will deliver excellent productivity gains
- Useful for establishing broader buy-in
- Some improvement in the legacy portions of the organization due to osmosis

Con:

- Resisters in the legacy portions of the organization are unlikely to decide to change.
- Individual contributors in legacy portions of the organization continue to suffer under unreasonable expectations.
- Legacy portions of the organization will only deliver marginal improvements.
- Legacy portions of the organization will attempt to create an illusion of change that obscures the real productivity gap.
- Isolation can be hard to achieve.

1.2.4 Executive Pull–Based Change Model

This model has two key aspects:

- **Advisory:** Only provide knowledge and guidance to those who seek (pull) it.
- **Transparency:** Continually validate and publicize alignment to executive intent. Executives must ensure the pain of not changing exceeds the pain of changing. (See "1.1.2.3 Executive Values Drive Structure" on page 6.)

Pro:

- Provides a structured, actionable path to achieving real change in the entire organization
- Provides actionable guidance within each step of the Kotter change model (assumes a nonlinear view)
- Entire organization benefits from productivity gains
- Rewrites organizational DNA

Con:

- It is limited and empowered by the vision and commitment of executive leadership.
- Change is uncomfortable.
- Expect some staff turnover.

As long as the vast majority of people leaving the organization are managers who are uncomfortable serving others, is staff turnover a bad thing?

1.2.4.1 Transparency Mechanisms

To hold management accountable to an agile value system, an organization must first establish effective transparency mechanisms. Executive management must endorse and support these mechanisms and ensure everyone in the organization understands and accepts relevant changes in the role expectations.

Without the transparency component the Executive Pull–Based Change Model devolves to the very limited Attractor Change Model.

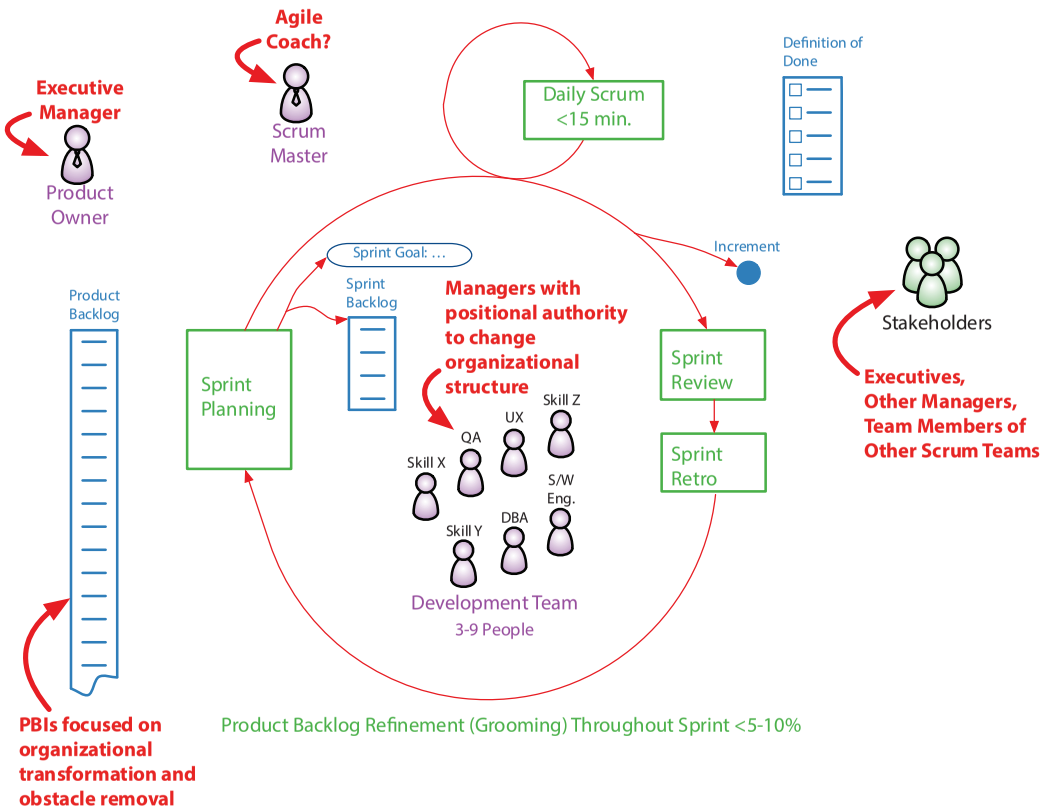
Great care must be taken to ensure the chosen transparency mechanisms will resist distortion; otherwise there will be a lot of ceremony and very little actual change. Without such mechanisms the Executive Pull–Based Change Model will quickly devolve into the very limited Attractor Change Model.

To make this a bit more actionable, I describe several concrete transparency mechanisms below. Each of these is a proven technique that is generally effective with enough executive management support. There is not a lot of consistency in how these techniques are named within the agile community, even though each one will likely be recognizable to a seasoned agile coach. I recommend you start with the techniques listed here, then evolve these techniques and invent new ones as you discover what works best in your own context.

1.2.4.1.1 Leadership Scrums

- Product Backlog Items (PBIs) focused on organizational changes
- Managers as Scrum Development Team members
- Executive manager as the Product Owner
- Executive Agile Coach or other appropriate choice as Scrum Master
- Usual Scrum mechanics to drive accountability

> Populating the Leadership Scrum Development Team with nothing but agile coaches and project managers will destroy the intention of holding functional and engineering managers accountable for change.



Leadership Scrum

Unlike a typical Scrum Team which develops shippable software, a Leadership Scrum is focused on creating organizational change. The Development Team roles are filled by those in the middle management layer, with the Product Backlog Items focused on improving the ecosystem. Although there is a difference in product focus and who is playing the various roles, a Leadership Scrum is structurally identical to every other Scrum Team.

Development Team: Managers

Product Owner: Executive Sponsor

Scrum Master: Initially Agile Coach

Stakeholders: Everyone else, including those who report to the managers in the Development Team.

Figure 1-1 A Leadership Scrum Team organizes managers under the same execution model as any other Scrum Team. Whereas a typical Scrum Team is focused on product delivery to customers outside the organization, a Leadership Scrum Team is focused on organizational improvement. Without a mechanism to hold middle management accountable for serving product-focused Scrum Teams, middle managers will typically continue in their old behaviors. If product-focused Scrum Development Teams are fully accountable for delivery, there should be no excuse for middle management to be doing anything unrelated to improving the organization.

1.2.4.1.2 Agile Assessments

- Routine assessments of alignment to desired agile processes and desired engineering practices
- Assessment of knowledge depth in empirical process control
- Aggregated scores on each measure at each management layer
- Validated by an external expert—typically an external agile coach—whose reporting chain is independent of those being measured
- Assessment structure and results typically managed in a big spreadsheet or equivalent online tool containing clearly defined measures, assigned scores, and improvement actions, with heat maps, spider graphs and the like produced to help people see the big picture

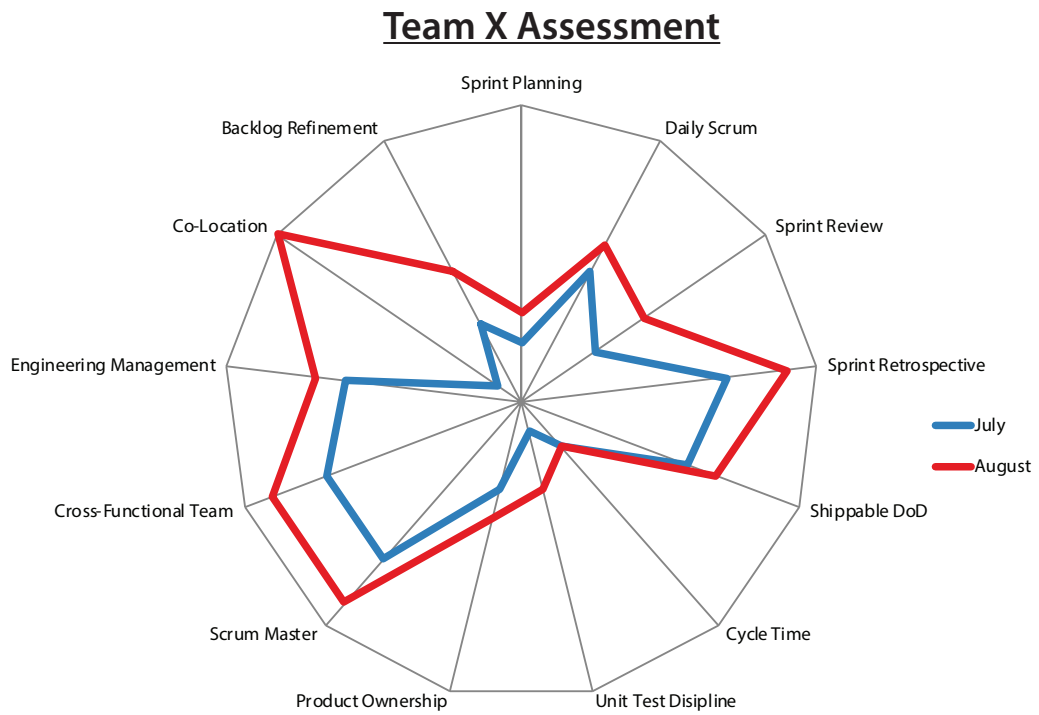
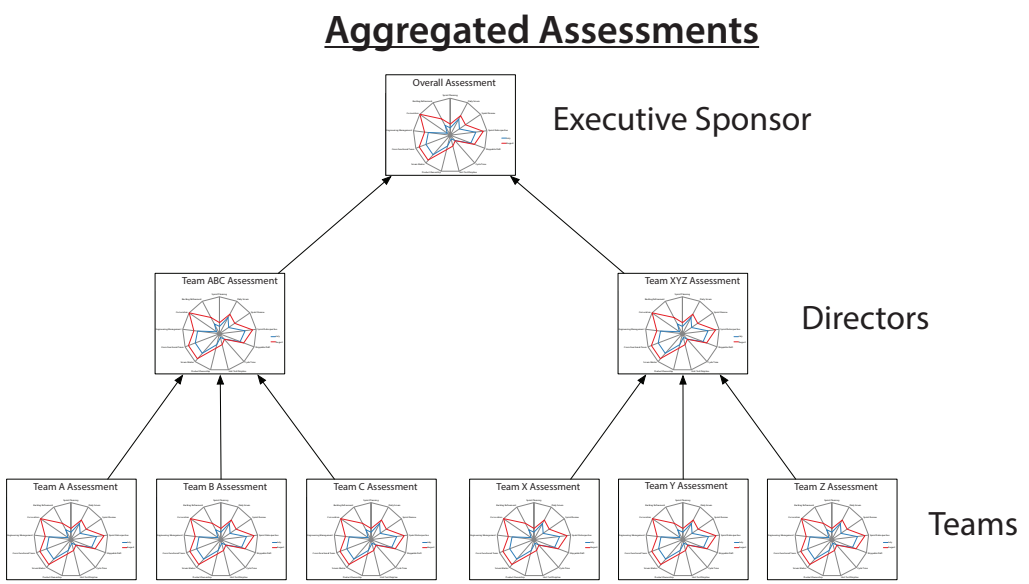


Figure 1-2 Agile assessments are used to provide transparency and trending on a variety of process and craftsmanship practices. To avoid underreporting of politically disagreeable facts, the assessments must be overseen by someone orthogonal to the reporting chain of those being assessed. To ensure any customized measures are aligned with an agile value system, the measures should be collaboratively designed by experts in agile process and engineering craftsmanship. The individual team results are typically aggregated along each measure to make the agile adoption progress of each manager or Scrum Leadership Team self-evident. The example spider graph provides a few sample measures; real-world assessments have at least twice as many.



1.2.4.1.3 Obstacle Board Process

- Issue tracking of impediments discovered by agile teams that are outside the team's ability to solve without management involvement
- Less subjective escalation procedures which make it obvious when managers are failing to serve those they have the privilege to lead; for example, no obstacle should remain on a given board for more than three days before being forcibly promoted to the next-level board by a relevant Scrum Master
- Frequently inspires PBIs for the Leadership Scrum Team's Product Backlog
- Cadenced review mechanisms in which the executive manager holds management accountable for actively working and removing obstacles; frequently joined with Leadership Scrum Sprint Review

The tactical nature and high visibility of physical boards seem to generate and maintain more social awareness than pure electronic solutions. Try to establish an effective information radiator, not an information closet.

An obstacle board process typically requires the active engagement of executive management to be successful; otherwise, middle management focuses on whatever else executive management is focusing on.

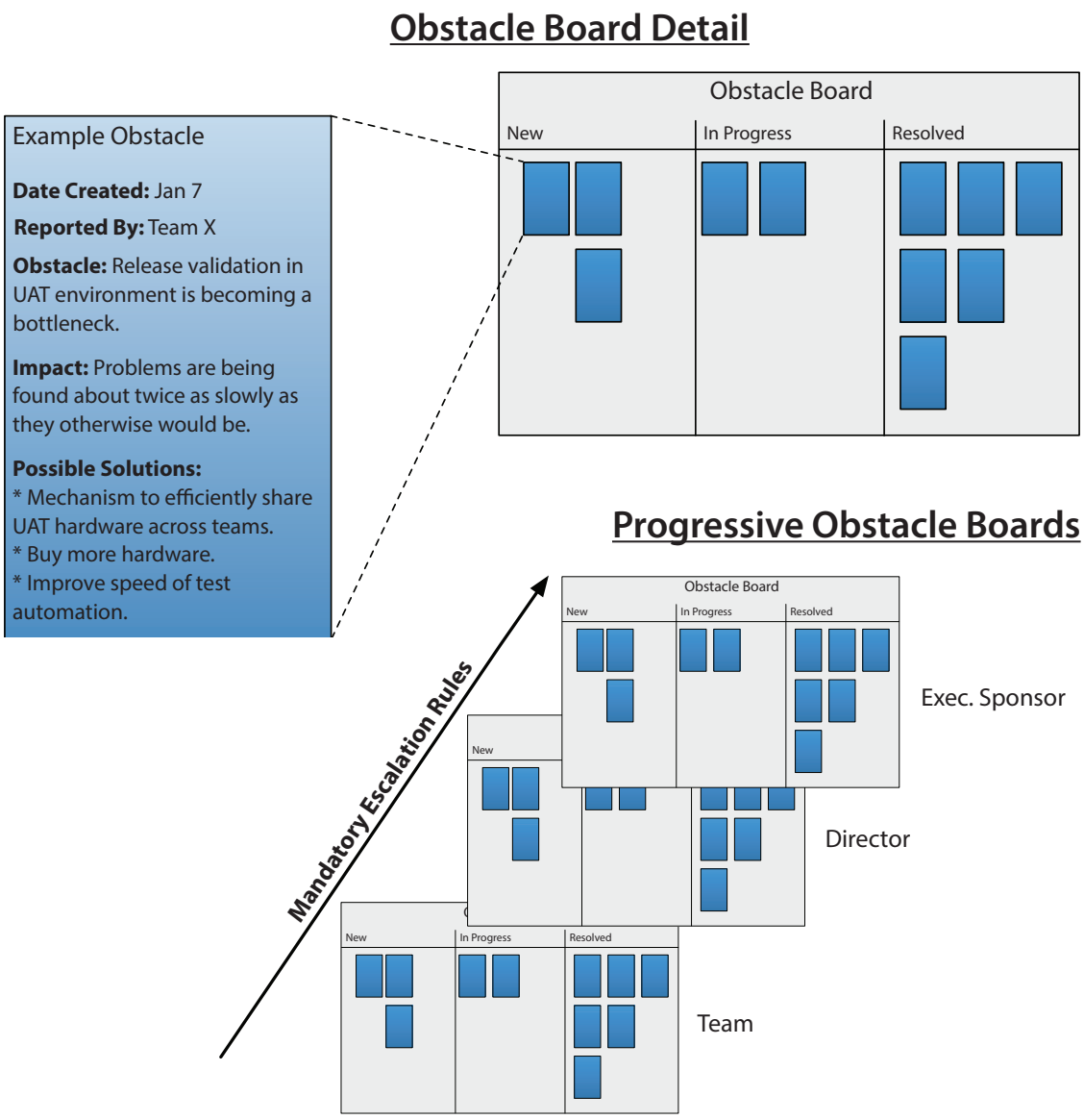


Figure 1-3 An obstacle board process establishes a lightweight mechanism for tracking the life cycle of obstacles identified by the individual teams. Creating an obstacle ticket should be as effortless as possible. Even the meekest team members should be encouraged to identify obstacles and protected from any repercussions of doing so. An enforced escalation mechanism based on obstacle age or a similar measure must ensure obstacles are quickly given higher visibility when not rapidly resolved. As an example, no obstacle should remain on a given board for more than three days before being forcibly promoted to the next-level board by a relevant Scrum Master.

1.2.4.1.4 Continuous Coaching

- Continuous coaching by expert agile coaches until agile transition is largely complete
- Ensure agile coaches have a reporting structure that bypasses the group undergoing organizational change.
- Frequent communication between executive management and agile coaches

> Agile coaches can only provide transparency and guidance. Executive management must hold employees accountable for change.

1.2.5 Leadership Must Drive Change

A mentor of mine once told me you can't push on a string. The example transparency mechanisms described for the Executive Pull–Based Change Model provide guidance for establishing strings that can create the social tension needed to motivate cultural change. Although anyone can help put the strings in place, ultimately senior management must be willing to pull on them.

When working with a new product-focused Scrum Team, I frequently encourage the team to pay careful attention to their definition of Done. I tell them it is very likely they will be challenged to prove any PBI they claim as done, and demo in the Sprint Review meets the definition of Done as well as any acceptance criteria detailed in the PBI. Shortly before the team's Sprint Review, I advise a few managers to selectively drill down and spot check more challenging line items in the definition of Done during the Sprint Review.

For example, let us assume the team's definition of Done requires automated unit tests for any new or modified code. I might meet with the chief technology officer before the Sprint Review and suggest surprising the team during the meeting with an ad hoc request that they present and demo the unit tests for one of the PBIs.

No matter how well I try to prepare the team and how transparent I am about having management hold the team accountable to the definition of Done, it isn't until managers actually follow through on holding the team accountable to the definition of Done that I see meaningful behavioral change in the teams.

This example was focused on a typical product-focused Scrum Team, but exactly the same approach can be used for Leadership Scrum Teams. Until senior management challenges the members of a Leadership Scrum Team to take items in their Sprint Backlog seriously, the mid-level

managers in the Leadership Scrum Team will continue in their old behaviors. I find it is best to initially run one-week Sprints for Leadership Scrum Teams, as they tend to be a rather stubborn group requiring a lot of reinforcement before they will change their individual focus and behaviors.

In the example above, the built-in transparency mechanisms of Scrum's Sprint Review and Definition of Done are the strings management must pull on. More broadly, a formal review of agile assessment results, an informal review of a set of obstacle boards, and routine one-on-one meetings with a senior manager's direct reports each provide an opportunity for a senior manager to demonstrate a focus on and commitment to helping the organization embrace an agile value system.

Fredric Laloux's "Reinventing Organizations" details a color based scheme for categorizing the cultural maturity and social operating model of an organization.

When attempting to implement an agile execution model, it helps to remember how critical active leadership support is in driving change. In terms of Frederic Laloux's organizational maturity models, you are probably trying to transform a predominately Orange-level organization to a Green-level organization. If you are already working in a Green organization, you probably don't need anything in part 1 of this book. If you are working in a Red or Amber organization it is highly unlikely senior management will be willing to accept much of the guidance in part 1 of this book.

1.2.6 Refining Transparency Mechanisms in a Scrum Studio

Early in the life of a Scrum studio, the combination of self-motivated volunteers and smaller scale means that Scrum's built-in transparency mechanisms are usually all that is needed. In these early stages, formal assessments create an additional, unwelcome burden for people who are already eagerly struggling to adapt to an entirely new way of working. Assuming the Sprint Retrospectives are running well, the Scrum Teams will already know their immediate problems.

As a Scrum studio matures, the situation changes. The initial struggles of adopting Scrum pass, and teams gel. Many of the numerous benefits of the higher-level transparency mechanisms used in the Executive Pull–Based Change Model will now yield similar benefits within the Scrum studio. Many of the larger remaining obstacles will now be outside the control of the Scrum studio. Anything that helps clarify the various obstacles and makes them more visible inside and outside the Scrum studio increases the likelihood that the obstacles will be removed.

More importantly, the Scrum studio can be used as a petri dish for refining and adapting transparency techniques in preparation for their use in an Executive Pull–Based Change Model. Putting the high-level transparency mechanisms in place and iteratively adjusting them based on the collaborative feedback of enthusiastic Scrum studio members inevitably results in better transparency mechanisms. The resisters outside the Scrum studio will be looking for any excuse to discredit the agile adoption effort. Better to train in a safe environment, before taking action in a less forgiving environment.

1.3 REFERENCE INFORMATION

A variety of chapter-specific reference information is available on the companion website at http://forgingchange.com/fc_adm. This URL has been encoded in the QR code below for your convenience.