DESIGNING AGILE TRAINING COURSES FOR MAXIMUM IMPACT AND RESULTS

Dr. JACK PHILLIPS, STEVE TALLENT, RAVI VERMA
Quick Guidelines

• Your microphones will be muted throughout
• Please ask questions!

  • Type questions into the webinar questions box:

  • Type comments into the webinar comments box:
Who Is Scrum.org?

Training

Certification

Founded by Ken Schwaber Co-creator of Scrum
Jack J. Phillips, chairman of ROI Institute, a world-renowned expert on accountability, measurement, and evaluation:

- Consults for Fortune 500 companies and major global organizations.
- Has written or edited more than 75 books.
- Conducts workshops and presents at conferences throughout the world.
- Has been recognized and awarded for his work in the field by numerous professional organizations.
- Has had work featured in the *Wall Street Journal*, *BusinessWeek*, and *Fortune* magazine.
- Has been interviewed by several television programs, including CNN.
• Agile Coach, EBM Consultant at SmoothApps
• 25+ Years in I.T. Delivery & Consulting
• Start-up’s - Fortune 500 Companies
• Healthcare - Financials - Travel - Sports
• Entrepreneur - CTO - PO - Product Analyst - Data Analyst - Engineer
• Agile - Business Intelligence - Data Analytics - ROI – Dashboards
• BS in Industrial Engineering from the University of Arkansas. Graduate of the IBM System Engineering Program.
RAVI VERMA

- Founder & Org Whisperer at SmoothApps
- C-Level Enterprise Agile Coach • 10 – 10K employees • 1 to 350 Agile Teams
- PST, SPS Course Steward, EBM Consultant, Class Clown @ Scrum.org
- Trained 1K students in Scrum.org classes. Probably 2K-3K including all classes.
- 20+ Years in I.T. Delivery:
  - Networking • Telecom • Security • Banking • Real Estate •
  - Healthcare • Travel • Sports • Media • Agrotech • Personals
- Co-founder Agile For Patriots, Agile DevOps DFW
- Creator of Sabotagile Manifesto and Sabotagile Principles
- Co-creator of Software Code of Ethics, Scrum Pulse Webinars & Scrum Tapas Video Series
- Story-teller: Agilato Video Series, SmoothApps Agile Blogs
TAKE 1 - SALLY, DARRELL & FLINTO
STAKEHOLDERS
SALLY: C-Level Executive

- I.T. Sucks!
- Can’t deliver to save their life
- Always late
- Never what we asked for
- Never what we want
- Never what we need
- Always buggy
- Would replace the whole lot of them if I could!
- Make them “Agile”
BUYERS
IZZY: “All I want is to buy the cheapest Agile certificate to check the box”

STELLA: “Stay in your lane! Just shut up and train!”

SLY: “All I want the cheapest slide reader on the market so I can tell my stakeholders we are all “Agile-trained” by a human being.”
DARRELL: Director of Software Development

1. Increase incremental delivery of value
2. Increase throughput of features
3. Decrease cycle time
4. Increase quality
5. Improve regulatory compliance
6. Improve Business-I.T. collaboration

- 4 Hour Intro to Agile
- 2 Day Scrum.org Professional Scrum Foundations
- Each student gets 1 attempt to Scrum.org PSM-1 Assessment
STUDENTS
MANNY: Manager of some students. “Training is a waste of time.”

DEBBIE: Debater. Sole mission is to argue and prove the trainer is wrong about everything.

WALLY: Voluntold by boss. Would rather be doing “real work”. Hates every single minute, lets others know.

ARI: Training is paid R&R. Streams Masters because, “Come on – it’s Tiger!”
**BESSY:** No basic knowledge, no pre-class prep-work.
Tuned out / frustrates class with questions answered in prep-work.

**MEL:** Multi-tasking. On laptop, cell-phone.
In & out of training, disrupting everyone.
“No one told me I couldn’t do real work during training, otherwise I wouldn’t have signed up.”

**CALLIE:** Collects paid training and certs for resume. No intention of on the job application.

**LENNY:** Curious learner. Frustrated with other students and trainer.
What happened next?
• 30 Day PSM-1 Results →
• Poor understanding of theoretical fundamentals.
• Contradictory interpretations, arguments. “What he said.” “What he meant.”
SKEPTICS: “See...? I told you so! I told you it wouldn’t work here! Agile is BS! Agile is outdated! We need something modern.

DARRELL: “Pure chaos! Worse than before training.”

SALLY: “Let’s try Digital-BizDevSecOps-Cloud-Blockchain-IOT-AI-VR-<insert favorite buzzword here>!”

FLINTO: Frustrated. “These people just don’t get it!”
• Which business outcomes did we achieve...
1. Increase incremental delivery of value
2. Increase throughput of features
3. Decrease cycle time
4. Increase quality
5. Improve regulatory compliance
6. Improve Business-I.T. collaboration
What did we value...

1. Individuals & interactions
2. Working software learning
3. Customer Learner Collaboration
4. Responding to change

Which Principles did we apply...

1. Early, continuous, valuable delivery of learning
2. Welcome & harness change to learning
3. Deliver working learning solutions frequently
4. Business Buyers, learners & developers teachers work together
5. Motivate, support, trust developers learners and teachers
6. Face to face conversation learning
7. Working software Evidence of effectively applied learning is progress
8. Sustainable pace of learning
9. Technical excellence, good design of learning
10. Simplicity of learning
11. Self-organization of learning
12. Reflect & improve learning
WWJPD...?
Generates Six Types of Measures
Generates Six Types of Measures

...and includes a technique to isolate the effects of the program or solution.
ANGIE: Engaged Director of PO’s, buyer

• **TARGET OUTCOMES:**
  - Every attendee passes PSPO-1 within 30 days
  - Every PO improves maturity to level 4/5 in 90 days

• **COMMITMENT:**
  - Willing to hold people accountable
  - Willing to invest time in attending training, applying training, attending post-training coaching sessions
ROY: ROI Institute trained Trainer
• Engaged to deliver a 2 Day Scrum.org PSPO workshop
• Tired of being unfulfilled as “Flinto”
• Wants to drink his own dog-champagne
• Willing to lose business rather than be unprofessional, unethical, inauthentic, “un-Agile”
• Negotiates pre-sales agreement with Angie...
PRE-SALES PARTICIPATION AGREEMENT:

- **Eligibility:** Only for students and managers who agree to honor participation agreement

- **Pre-class expectations:**
  - No multi-tasking in class
  - No streaming in class (even if its Tiger 😊)
  - Complete pre-class prep work: Open Assessment + resources
  - Pre-class PO Maturity Assessment (5 stages)…
PO PLAYBOOK & MATURITY ASSESSMENT

<table>
<thead>
<tr>
<th>#</th>
<th>PLAY</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>PRODUCT VISION</td>
</tr>
<tr>
<td>2</td>
<td>PRODUCT PERSONAS</td>
</tr>
<tr>
<td>3</td>
<td>PRODUCT WIG (WILDLY IMPORTANT GOAL)</td>
</tr>
<tr>
<td>4</td>
<td>PRODUCT LEADING INDICATORS</td>
</tr>
<tr>
<td>5</td>
<td>PRODUCT SCOREBOARD</td>
</tr>
<tr>
<td>6</td>
<td>PRODUCT STRATEGIC PILLARS</td>
</tr>
<tr>
<td>7</td>
<td>PRODUCT INVESTMENT &amp; EXPECTED ROI</td>
</tr>
<tr>
<td>8</td>
<td>PRODUCT BUSINESS MODEL</td>
</tr>
<tr>
<td>9</td>
<td>PRODUCT COMPETETIVE ANALYSIS</td>
</tr>
<tr>
<td>10</td>
<td>PRODUCT IMPACT MAPPING</td>
</tr>
<tr>
<td>11</td>
<td>PRODUCT ROADMAP</td>
</tr>
<tr>
<td>12</td>
<td>PRODUCT RELEASE FORECAST</td>
</tr>
</tbody>
</table>
PRE-SALES PARTICIPATION AGREEMENT:

Post-class Expectations:

• Validate Learning:
  - 2 weeks: 1\textsuperscript{st} PSPO-I attempt.
  - 4 weeks: 2\textsuperscript{nd} PSPO-I attempt (for those who failed 1\textsuperscript{st} attempt)

• Apply Learning:
  - 4 Week Application
  - Complete experiment
  - Peer Accountability: Share results through lightning talk in Lunch & Learn
**PRE-SALES PARTICIPATION AGREEMENT:**

**Post-class Expectations:**

- **PO Maturity Assessment:** Increase PO Maturity to 4/5 within 4 months
- **Post-Class Coaching Support:**

<table>
<thead>
<tr>
<th>#</th>
<th>Role</th>
<th>Slack Community</th>
<th>Team Coaching</th>
<th>1x1 Coaching</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>PO’s</td>
<td>✓</td>
<td>90 minutes weekly</td>
<td>60 minutes bi-weekly</td>
</tr>
<tr>
<td>2</td>
<td>BA’s</td>
<td>✓</td>
<td>60 minutes bi-weekly</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>SM’s</td>
<td>✓</td>
<td>60 minutes weekly</td>
<td>30-60 minutes bi-weekly</td>
</tr>
<tr>
<td>4</td>
<td>Buyer</td>
<td>✓</td>
<td>60 minutes weekly</td>
<td>60 minutes weekly</td>
</tr>
<tr>
<td>5</td>
<td>Mgr’s, Dir’s</td>
<td>✓</td>
<td>60 minutes bi-weekly</td>
<td>1x1 for key Dir’s</td>
</tr>
<tr>
<td>6</td>
<td>VP’s &amp; Dir’s</td>
<td>✓</td>
<td>60 minutes weekly</td>
<td>Very little engagement from key leaders</td>
</tr>
<tr>
<td>7</td>
<td>Everyone</td>
<td>✓</td>
<td>Ask Me Anything 60 minutes monthly</td>
<td></td>
</tr>
</tbody>
</table>
What happened next?
TARGET BUSINESS IMPACTS:

- Increase Product ROI
- Decrease Waste – unused features, rework
- Decrease time to market
- Increase customer satisfaction and retention
- Increase employee satisfaction and retention
Which business outcomes did we achieve...

• All PO’s pass PSPO-1 within 30 days:
  - 100% of all PO’s passed PSPO-1
  - 85% of all students passed PSPO-1

• Every PO improves maturity to level 4/5 in 90 days
  - 40% PO’s reached or exceeded target maturity
What did we value...

1. Individuals & interactions
2. Working software learning
3. Customer Learner Collaboration
4. Responding to change

Which Principles did we apply...

1. Early, continuous, valuable delivery of learning
2. Welcome & harness change to learning
3. Deliver working learning solutions frequently
4. Business Buyers, learners & developers teachers work together
5. Motivate, support, trust developers learners and teachers
6. Face to face conversation learning
7. Working software Evidence of effectively applied learning is progress
8. Sustainable pace of learning
9. Technical excellence, good design of learning
10. Simplicity of learning
11. Self-organization of learning
12. Reflect & improve learning
THE ROI METHODOLOGY® PROCESS MODEL

Designing for the Delivery of Business Results

EVALUATION PLANNING

LEVEL 0: INPUT
Start with Why: Align Programs with the Business
Make it Feasible: Select the Right Solution
Expect Success: Plan for Results

LEVEL 1: REACTION AND PLANNED ACTION
Make it Matter: Design for Input, Reaction and Learning

LEVEL 2: LEARNING
Make it Stick: Design for Application and Impact

LEVEL 3: APPLICATION
Make it Credible: Isolate the Effects

LEVEL 4: IMPACT
Make it Credible: Convert Data to Monetary Value

LEVEL 5: ROI
Make it Credible: Calculate ROI
Make it Credible: Tabulate Costs of Program
Make it Credible: Identify Intangibles

INTANGIBLE BENEFITS

OPTIMIZE RESULTS
Tell the Story: Communicate Results to Key Stakeholders
Optimize Results: Use Black Box Thinking to Increase Value

Copyright 1995-2020 ROI Institute Inc. – No part of this document can be reproduced, stored in a retrieval system, or transmitted in any form without written permission from ROI Institute, Inc.
THE ROI METHODOLOGY® PROCESS MODEL

Designing for the Delivery of Business Results

EVALUATION PLANNING

LEVEL 0: INPUT
Start with Why: Align Programs with the Business
Make it Feasible: Select the Right Solution
Expect Success: Plan for Results

LEVEL 1: REACTION AND PLANNED ACTION
Make it Matter: Design for Input, Reaction and Learning

LEVEL 2: LEARNING
Make it Stick: Design for Application and Impact

LEVEL 3: APPLICATION

LEVEL 4: IMPACT

DATA COLLECTION

DATA ANALYSIS

Make it Credible: Tabulate Costs of Program
Make it Credible: Convert Data to Monetary Value
Make it Credible: Calculate ROI
Make it Credible: Identify Intangibles

LEVEL 5: ROI

INTANGIBLE BENEFITS

OPTIMIZE RESULTS

Optimize Results: Use Black Box Thinking to Increase Value

Tell the Story: Communicate Results to Key Stakeholders

Roy only got this far…
CLOSING THOUGHTS...
1. This is not for most buyers of Agile Learning, esp. Stella, Izzy & Chip.

2. Begin with the end in mind. Train for target measurable business outcomes, not butts in seats or certifications.

   “If you don’t know where you’re going, any road will take you there.”
   – Alice in Wonderland, C.S. Lewis

3. Design the learning experience using Agile practices so that learners achieve target measurable business outcomes by target dates.

4. Measure learning efficacy every step of the way.

5. Compare actual outcomes to target outcomes. Reflect, learn, improve.
WHAT NEXT?
SMOOTHAPPS

• Evidence Based Agile Learning with ROI:
  – Training
  – Playbook
  – Coaching

• Contact Janie.Purvis@SmoothApps.com
For a free copy of the eBook, *Real World Training Evaluation* contact Kathy@roiinstitute.net.
Join Level 0 Membership at no cost to gain access to resource materials, eBooks, tools, and case studies.
ROI INSTITUTE®
ONLINE ACADEMY
12 Session Virtual ROI Certification

Visit www.roiinstituteacademy.com to register.
2020 SCHEDULED EVENTS

*July 14-16, Louisville, KY
August 3-7, Columbus, OH
August 31-September 4, Atlanta, GA
*September 15-17, Milwaukee, WI
September 21-25, Boston, MA

September 28-October 2, Charlotte, NC
October 26-30, Dallas, TX
November 9-13, Nashville, TN
*December 1-3, Albuquerque, NM

WHAT IS ROI CERTIFICATION?
ROI Certification is a globally renowned process focused on measuring the true value of tough-to-measure initiatives using the ROI Methodology®. Participating in ROI Certification is the most comprehensive way to gain the skills needed to evaluate major programs and to report the most credible results that drive organizational improvement.

Email: info@roiinstitute.net  Register: http://bit.ly/ROI2020  Call: 205.678.8101

This program has been approved for 37.5 (HR General) Recertification Credit Hours toward PHR, SPHR and GPHR recertification through the HR Certification Institute (HRCI).
Q&A

**Stronger Team. Better I.T.**

Phone: 214-785-5570  
Email: info@smoothapps.com

Connect with us on:

LinkedIn  Facebook  Twitter

**All Roads Lead to ROI**

Phone: 205-678-8101  
Email: info@roiinstitute.net

Connect with us on:

LinkedIn  Facebook  Twitter
Continue Your Learning – Learning Paths

- Scrum.org now has learning paths on our website for Scrum Master, Product Owner, Leadership and Development Team Members

- Provide structured guides to help you understand the roles of the Scrum Master/Product Owner with a way to continue learning on your journey

https://www.scrum.org/pathway/scrum-master
https://www.scrum.org/pathway/product-owner-learning-path
https://www.scrum.org/pathway/team-member-learning-path
https://www.scrum.org/pathway/agile-leader-learning-path
Connect with the Scrum.org community

Forums
Scrum.org /Community

Twitter
@scrumdotorg

LinkedIn
LinkedIn.com /company/Scrum.org

Facebook
Facebook.com /Scrum.org

RSS
Scrum.org/RSS

Insights from Scrum.org's community of experts

A free monthly webcast by Scrum.org Professional Scrum Trainers addressing common challenges faced by the software profession.