Non-standard agile processes: ScrumBut and agile transition

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• Observed deviations from Scrum in Scrum teams w.r.t.
  • Roles
  • Daily Scrum, Sprint Planning, Sprint Review
  • (curiously not Retrospectives)
• Discussion when they may be good or bad

• Agile transition as a gradual process in 5 dimensions
Learning objectives

- When and how deviating from Scrum may be a good idea
  - for a would-be Scrum team

- When and how deviating from Scrum may be a bad idea

- How becoming agile is a gradual process
  - with 5 identifiable separate concerns
Scrum parts reinforce each other

- The Scrum Guide states:
  - "Each element of the framework serves a specific purpose that is essential to the overall value and results realized with Scrum.
  - Changing the core design or ideas of Scrum, leaving out elements, or not following the rules of Scrum, covers up problems and limits the benefits of Scrum, potentially even rendering it useless."
  - "While implementing only parts of Scrum is possible, the result is not Scrum."

- But such changes are made frequently
  - Let's discuss some common ones:
ScrumBut

- "We do Scrum, but..." [for example:]
  - "...we don't need Retrospectives"
  - "...the Sprint Backlog is provided by management"
  - "...some people never come to the Daily Scrum"
  - "...we use a flow system instead of Sprint Planning"
  - etc, etc, etc.

- The resulting process may be an improvement or a weakness, sometimes resulting in a pseudo-agile crippling.
  - Pseudo-agile in the sense of violating the spirit of the Agile Manifesto.
Sources

  • based on direct observations of 5 teams and 45 interviews
    • India, New Zealand, Pakistan, UK

  • based on direct observations of 2 teams and a quantitative survey among 34 (out of 123) Scrum users
    • Sweden
    • (subsequent percentages are from the survey, >33% is marked)
  • found 4/7/2 deviations in Daily Scrum/Sprint Planning/Sprint Review
Our question

• Under which circumstances will this Scrum deviation be
  • a substantial mistake?
    • then: What are likely reasons for the deviation?
  • a substantial improvement?

• We discuss this question for each deviation
Scrum Master

- No Scrum Master after a previous one left
- Explicitly no Scrum Master
- Role handed around among experienced Developers
Developers

Scrum Guide:

- "Scrum Teams are cross-functional, meaning the members have all the skills necessary to create value each Sprint. [...] The specific skills needed by the Developers are often broad"

- ...have different roles
  - such as tester, developer, business analyst

- ...have strong specializations
  - such as front-end vs. back-end

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Daily standup

• ...often happens later than the scheduled time (35%)
• ...takes longer than 15 minutes (53%)
• Not all team members contribute (41%)
• ...is a open discussion, not a structured one (65%)
Sprint Planning

Who:
- Sprint Backlog populated by only 1 or a few team members
- Work assigned by team lead, not self-assigned by Developer

What:
- Multiple Sprint Goals specified
- No Sprint Goal specified (38%)
  - or only at the end of Sprint Planning (44%)
- No Product Backlog, only a Sprint Backlog (44%)
- Sometimes no estimate for story (62%)

How:
- Product Backlog items (stories) not broken down into tasks for Sprint Backlog (56%)
- Meetings over 8 hours (26%)
- Available resources not determined (47%)

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Sprint Review

- Not performed (44%)

- Not always feedback from customers or stakeholders (62%)
Sprint Retrospective

Table 3: Retrospective observation template

<table>
<thead>
<tr>
<th>Total Time</th>
<th>Used Method</th>
<th>Used Questions</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>How long does the</td>
<td>How does the team decides the important topics to discuss further?</td>
<td>What questions does the team retrospective answers?</td>
<td>For more notes if available</td>
</tr>
<tr>
<td>team retrospective</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>meeting take?</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

"none of the deviations observed during the retrospective was frequently enough confirmed in the online survey to be reported in this paper"
Agile transition

- The agile, self-organized and self-managed way or working needs to become **accepted** and **learned**.
  - This takes some time and effort.
  - So organizations (and teams) undergo a period of agile transition.

  - based on team observations and 31 interviews
    - India and New Zealand/Australia/USA/India/Portugal
  - finds **5 dimensions of change** that needs to be made
    - teams can be at any point in each dimension
    - sliding back is possible

(subsequent images are from that article)
Dimension 1: Development practices

Initially (Stage 1, S1):
- "getting acquainted with basic agile development practices such as the iterative and incremental delivery"
- "[Teams often retain] many of their earlier ways of working."
- "[Individuals may be] change resistant"

S2, S3: "[Later on, Teams would use e.g.]"
- pair programming, user stories and tasks, testing,
- frequent releases, daily stand up meetings, and in some cases, retrospectives."
Dimension 2: Teams' task-determination practices

- Regards
  - "requirements specification, prioritization, and clarification",
  - "effort estimation",
  - in particular "task assignment"
- S1: individuals are risk-averse, prefer less responsibility
- S2: they transition or get transitioned:
  - "I actually set a formal goal for [cross-functionality in] the KPIs [...] You should be [...] taking on big development even though you are a good database guy.
  - P2, Project Manager, New Zealand"
- KPI: Key Performance Indicator
Dimension 3: Managers' role

- Concerns roles or initial roles such as
  - Project Managers, Subject-matter Experts, Team Leads
  - also Scrum Masters
- S2 e.g.
  - "My team is very easily distracted by what is going on outside the project [...] that is where [...] I have to sometimes revert to classic-style management [...] command and control mode – P2, Project Manager, New Zealand"
- S3: "[Our project manager] clears operational or process-related blocks that hinder [the] completion of a task. – P16, Senior Developer, USA"
Dimension 4: Reflection and learning

Fig. 5. Transitioning Reflective Practices (TRP)

- S1:
  - Teams strongly implementation-focused. Agile trainings seen as a waste of time.
  - Few of them hold retrospectives.

- S2: Agile improvements become viewed as a to-do
  - "We are now working on process improvements"

- S3:
  - Nearly all teams hold retrospectives.
  - "Somebody who just learned new technology [...] speaks on Saturdays once a month. First half is theory and second half is hands-on [...] everybody would come and learn. – P22, Senior Developer, India"
Dimension 5: Operational culture

- Operational work culture, resulting from
  - organizational culture, team culture, individual traits
- S1: Decisions and communication along a hierarchy:
  - "if we [cannot] deliver [on time, we'll] document the reason [...] After getting the approval from the managers, we [send it] to the product owner who [explains the problem] to the clients.
    – P6, Developer, India
- S3: "So we can decide whether we can make this addition or to reject it [...] This is not done by any external influence but it is purely us.
  – P7, Tester, India
Reminder: Definition "Culture" [ShwBel15]

- "Explicit and implicit patterns of behavior"
  - that constitute achievements of a human group and
- "traditional ideas and [...] their attached values".
  - "Conventional understandings manifest in act and artifact."
- "'culture' refers to community-specific ideas about what is true, good, beautiful, and efficient."

Discussion:

- ...
- Whether one culture is preferable over another depends on
  - context (e.g. team, code base, rqmts., surrounding organization)
  - the values held by the observer.
Conjecture(!) how agile transition happens

1. SDPs must change first
2. TPs and MA influence each other, mediated by self-org roles
3. RPs transition only after TPs and MA have transitioned somewhat
4. Org., team, and indiv. culture mediate everything

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Success measures in practice

Data from the 2021 "State of Agile" report

<table>
<thead>
<tr>
<th>Metric</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>Business value delivered</td>
<td>49%</td>
</tr>
<tr>
<td>Customer/user satisfaction</td>
<td>49%</td>
</tr>
<tr>
<td>Velocity</td>
<td>45%</td>
</tr>
<tr>
<td>Planned vs. actual stories per iteration</td>
<td>35%</td>
</tr>
<tr>
<td>Team morale</td>
<td>31%</td>
</tr>
<tr>
<td>Budget vs. actual cost</td>
<td>30%</td>
</tr>
<tr>
<td>Cycle time</td>
<td>29%</td>
</tr>
<tr>
<td>Defects into production</td>
<td>28%</td>
</tr>
<tr>
<td>Planned vs. actual release dates</td>
<td>26%</td>
</tr>
<tr>
<td>Iteration burnout</td>
<td>25%</td>
</tr>
<tr>
<td>Defects over time</td>
<td>25%</td>
</tr>
<tr>
<td>Burn-up chart</td>
<td>23%</td>
</tr>
<tr>
<td>WIP (Work in Progress)</td>
<td>21%</td>
</tr>
<tr>
<td>Release burndown</td>
<td>20%</td>
</tr>
</tbody>
</table>

- The marked metrics are questionable at best, yet common
Practices used in practice

- 1 in 6 teams does no Retrospectives
- Half have no self-sufficient teams?
- Half do no Frequent Releases?

("Kanban" is probably just a Kanban board)
Summary

- Deviating from Scrum is often a bad idea
  - because it breaks how Scrum is supposed to achieve agility

- Deviating from Scrum can be a sensible idea
  - if it is well-matched to the context

- Becoming agile involves a gradual change of
  - work practices,
  - management practices (on teams' as well as managers' sides),
  - reflection and learning practices, and
  - operational culture

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Thank you!