Run Your Own Disciplined Agile Inception Phase Bootcamp

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Context

• The company
  • Very large US insurance company, regulated, traditional
  • Very old company, hierarchical management, many layers of middle managers
  • Portfolio is managed as projects; almost no teams are kept together as teams, they come and go with the project

• The problem
  • Inception phase (sprint zero) is taking anywhere from 6 weeks to 3 months (sometimes longer).
  • It is hard to get stakeholders' time.
  • We need an Agile way to kick off projects, something that sets the groundwork for the project and produces the initial backlog so the team can start sprinting.

• The solution
  • DAD inception phase done as a 2 day boot camp
    • Meets most of the goals of inception phase
    • Produce the initial backlog for first 2-3 sprints
DAD Inception Phase Goals

- Form initial team
- Develop common vision
- Align with enterprise direction
- Explore initial scope
- Identify initial technical strategy
- Develop initial release plan
- Secure funding
- Form work environment
- Identify risks
- Develop Initial Test Strategy

Goals in **BOLD** are met during the bootcamp
How it worked

• Offsite
• Facilitated and Scribed
• Catered
• Cell phones / tablets only during breaks
• Typically 2 days
Prepare the Attendees Before Scheduling the Event

• Identify who will attend

• Prepare a communication about what is being planned and the benefits of this bootcamp to the sponsor, stakeholders, and project team

• Share with each person the expectations that they will attend all two days in person, that they should be prepared to make decisions during the bootcamp, and that cell phones will be turned off most of the day
  • They should have a delegate handle their day-to-day work while they are away at bootcamp

• Get agreement from everyone - you are required to attend all of the 2 days - clear your calendar, no exceptions
Attendees

• Sponsor (only required 2 hours first day)

• Stakeholders/decision makers - required, not delegated

• SMEs (business & technical) - required, not delegated

• Project Manager/Scrum Master, Architect/technical lead, Product Owner - required, not delegated

• Team members

• One or more facilitators from outside the project

• One or more scribes from outside the project
Bootcamp Preparation

• Determine how the bootcamp will be run
  • When are you all together; when are you separate?
  • Will you have breakouts; what is the purpose of each breakout?

• Schedule a facility – ideally the room or rooms have large white boards
  • If you have breakouts, you will want a separate room for each breakout group

• Send a calendar invite to every attendee – reinforce that attendance is required and repeat the benefits to attending

• Schedule at least one facilitator and scribe
  • If you have break out sessions, you need a facilitator and scribe for each breakout
  • Use people who are trained in their roles and how to run the session

• Arrange catering for breakfast, lunch, and drinks

• Get a couple of small boxes to put by the doors for people to put their cell phones in during the session

• Get lots of pens, sticky notes, easel pads, white board markers and erasers, and a timer for each room
Day 1 Schedule

1. Sponsor describes the vision of the project, answers questions about it, facilitator formulates one or more statements to express what is being discussed and makes sure the stakeholders and team are aligned on the vision.

2. Stakeholders, SMEs, and team Identify the "big rocks", the epics. What is in scope, what is out of scope? What risks do we know of?

3. Architect, technical lead, SMEs from other technical groups as needed (such as enterprise security) discuss ideas for the technical approach and identify technical risks.

LUNCH BREAK

4. Based on risk and value, develop an initial release plan using the epics.

5. Take one or more epics from the first release and do a fast story writing session (15-30 minutes) to break it down into manageable chunks
   • Divide into groups, give each group one epic to work on
   • Each group includes business and technical people
   • Encourage them to do quick sketches if it helps them understand the epic better

6. Until the end of the day, each group adds initial acceptance criteria to each of their user stories. They may also continue to identify user stories and sketch ideas.

Note that number 2 and 3 are often done in parallel break out sessions, each with a facilitator and scribe.
Day 2 Schedule

1. Everyone together, do a fast prioritization exercise - this takes 15-30 minutes depending on number of user stories

2. Starting with the highest priority user story, discuss the user stories one by one, clarifying what is intended, adding any notes required. Note any questions that are still open and need further research. Stakeholders should make any decisions needed so stories are ready to be worked on immediately.

The facilitator is key to keeping these discussions focused and moving.

LUNCH BREAK

3. Just after lunch, as a group do a fast story pointing exercise - this takes 15-30 minutes. Estimate how many user stories you need to complete by the end of the day.

4. Continue discussing the user stories and adding details.

5. At the end of the day, do a final fast story pointing exercise. Confirm we have enough user stories for at least 2 sprints (best guess based on experience).
Why it Works

• Everyone is in the room together, including decision makers and we are there with the purpose of getting decisions made.

• It is facilitated and scribed - someone who is not a participant is responsible for keeping the meeting on track, someone who is not a participant is responsible for keeping notes. We used people trained in facilitation and scribing. We often had more than one of each.

• It is offsite and cell phones are actually turned off and collected at the door. This provides a lot of focus.
Typical Outcome

• Everyone, including the stakeholders and SMEs, feels that they really accomplished something. They have a great sense of purpose about the project, and have learned to work closely together.
  • If you ask the stakeholders at the end of the bootcamp if you can schedule another ½ day with them in a couple of weeks for a similar session to work on future user stories, you are very likely to get agreement
    • Schedule this immediately while everyone is feeling good about the work they completed!!

• Having experienced it once, some teams asked for a third day to further explore technical issues and testing, and to do sprint planning for the first sprint.

• The Disciplined Agile Inception Phase does not have to be long, even for large projects; it can be mostly completed in a two day bootcamp.
Thank you!