DISCIPLINED AGILE
An Overview

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Who is Disciplined Agile?

DA was created by Mark Lines and Scott Ambler in Canada

Part of the PMI family as of August 2019

DA is a toolkit of Agile strategies and practices to complement any agile framework or method such as Scrum or SAFe
PMI’s Classic PM & DA Guidance are for Different Purposes but Complimentary

The New PMBOK Guide includes Agile content

DA includes guidance on Risk Management & Governance
Disciplined Agile (DA) is a process-decision toolkit that provides straightforward guidance to help people, teams, and organizations to streamline their processes in a context-sensitive manner in all levels of the organization.

DA provides a solid foundation for business agility by showing how the various activities such as Solution Delivery (software development), IT Operations, Enterprise Architecture, Portfolio Management, Security, Finance, Procurement and many others work together. DA also describes what these activities should address, provides a range of options for doing so, and describes the trade-offs associated with each option.
Successful Agile Organizations Take Responsibility for Evolving their own Agility

• Success doesn’t come from adopting a prescriptive framework or methodology such as Scrum or SAFe, *although it may be a good start!*

• For true business agility, we need to “Choose our agile way of working (WoW)”, optimizing for our unique situations

Choose Your Wow! is DA’s BOK for Disciplined Agile Delivery
Agile has Devolved into Chaos

- Hundreds of Practices
- Significant overlap
- Significant gaps
- Conflicting advice
- Niche Certifications
The Seven Principles of Disciplined Agile

- Be Awesome
- Pragmatism
- Delight Customers
- Context Counts
- Choice is Good
- Optimize Flow
- Enterprise Awareness
- Delight Customers
Disciplined Agile (DA) is described in four views.
Primary Roles on Disciplined Agile Delivery (DAD) Teams

Team Lead
Agile process expert, keeps team focused on achievement of goals, removes impediments (i.e., call Agile PM, Scrum Master)

Product Owner
Owns the product vision, scope and priorities of the solution

Architecture Owner
Owns the architecture decisions and technical priorities, mitigates key technical risks

Team Member
Cross-functional team members that deliver the solution

Stakeholder
Includes the customer but also other stakeholders such as the sponsor, operations engineers, support staff, architecture, database groups, finance, and more
Disciplined Agile is an agnostic hybrid that leverages strategies from a variety of sources.

SAFe®
DevOps
...and more

PMI® Guide®
“Traditional”
Agile Data

Extreme Programming
Unified Process
Agile Modeling

Scrum
Kanban
Lean

...and more

SAFe®
Your team interacts with others, and they need to become agile too!
A process blade addresses a specific organizational capability, such as finance, people management, data management, agile solution delivery, procurement, and more.

A process blade encompasses a cohesive collection of process options – including practices, strategies, and work flows – that should be chosen and then applied in a context sensitive manner.
Process blades encompass lots of practices.
Explore Usage

There are many ways to explore how people will work with our solution. Although there is significant focus within the Agile community on user stories and epics, there aren't our only choices. Disciplined Agileists prefer to use the best technique for the situation they face, and as you can see in the table below there are several options available to us.

<table>
<thead>
<tr>
<th>Options (Not Ordered)</th>
<th>Trade-Offs</th>
</tr>
</thead>
</table>
| **Epic** Large stories that take a lot of effort, often multiple iterations, to complete. Epics are typically organized into a collection of smaller user stories [W]. Sometimes Epics are referred to as Features or User Activities. | • Used as a technique to build empathy for users as real people, and to understand the optimal user experiences for each.  
• Useful when we don’t have access to actual end users, or potential end users.  
• Can be used as an excuse not to work with actual users. |
| Outcome. An outcome describes a desired, measurable result that is pertinent to our stakeholders. | • Outcomes describe what stakeholders would like to achieve and why they would like to achieve that, but not how to do so.  
• Provides teams flexibility in how to achieve the desired outcome.  
• Useful to capture high-level stakeholder needs. |

**Persona** Detailed descriptions of fictional people who fill roles as stakeholders of the solution being developed [W].

*Unified Modeling Language (UML) use case diagram.* Diagrammatic notation for a textual use case [W, ObjectPrime].

Use scenario. Describes the step-by-step interaction between a use/actor and the solution. Similar to acceptance criteria, although tends to cross the equivalent of several stories. Also known as a use-case.

Useful to flush out all the different ways that a solution can be used, often putting granular requirements such as stories or features into context.

Danger of becoming a set of detailed requirements.

Scenarios are typically less structured than
Teams should choose an appropriate lifecycle for their situation.

- **Agile**
- **Continuous Delivery: Agile**
- **Exploratory**
- **Lean**
- **Continuous Delivery: Lean**
- **Program**
The Agile Lifecycle
The Continuous Delivery: Lean Lifecycle

- New Features
  - Business Value
  - Fixed Delivery Date
  - Expedite
  - Intangible Options

- Envision the future
- Replenishment modeling session
- Roadmaps & Guidance
- Evolve WoW
- Process Experiments

- Daily work
  - Work items are pulled when capacity is available to address them
  - New Work
  - Feedback
  - Demo
  - Coordination Meeting

- Release solution into production
- Operate and support solution in production

Construction

- Continuous stream of development
- Sufficient functionality
- Production ready
- Delighted stakeholders
The Business Service Team Lifecycle

New Requests

- Operational Support
- Compliance
- Expedite
- Strategic Work Items

Replenishment session

Obtain feedback

Pull work item

Perform work

Coordinate

Evolve WoW

Process Experiments

Continuous Flow of Work

Finish
## DAD milestones – Lightweight and consistent

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Fundamental Question Asked</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stakeholder vision</td>
<td>Do stakeholders agree with your strategy?</td>
</tr>
<tr>
<td>Proven architecture</td>
<td>Can you actually build this?</td>
</tr>
<tr>
<td>Continued viability</td>
<td>Does the effort still make sense?</td>
</tr>
<tr>
<td>Sufficient functionality</td>
<td>Has the team produced (at least) a minimum business increment (MBI)?</td>
</tr>
<tr>
<td>Production ready</td>
<td>Will the solution work in production?</td>
</tr>
<tr>
<td>Delighted stakeholders</td>
<td>Are stakeholders happy with the deployed solution?</td>
</tr>
</tbody>
</table>
Guided Continuous Improvement (GCI)

- **Identify Problem**
- **Identify Potential Solution(s)**
- **Try the Solution(s)**
- **Assess Effectiveness**
  - **Adopt What Works**
  - **Abandon What Doesn’t Work**
- **Share Learnings**

**If we get better at this, we succeed more often and improve faster.**

**We can do this if we have access to an experienced agile coach, but they’re expensive and hard to find.**

**We can do this if we have access to a process knowledgebase, like the Disciplined Agile (DA) toolkit.**

**Some experiments fail. You learn something, but it’s still a failure.**

**Failing fast is fine, but succeeding early is better.**

If we get better at this, we succeed more often and improve faster.

We can do this if we have access to an experienced agile coach, but they’re expensive and hard to find.

We can do this if we have access to a process knowledgebase, like the Disciplined Agile (DA) toolkit.
Start where you are, do the best that you can in the situation that you face, and always strive to get better.
In Summary

• Disciplined Agile is a rich, comprehensive and well-organized toolkit of strategies to help your organization be more successful with Agile

• DA brings a disciplined, agnostic, professional, enterprise approach to agile which is what our industry has been lacking in the past

• Understanding what your options are, and which ones work in different contexts leads to better decisions

• Better decisions lead to better outcomes

“Better Decisions Lead to Better Outcomes”
DA Certifications

- There are 6 DA certifications
- The DA certification program is a principled approach based on the Shu-Ha-Ri Philosophy of learning
Disciplined Agilist

Being a Disciplined Agilist (DA) indicates to colleagues and employers that you have taken some initial steps to learn about Disciplined Agile. This is typically a stepping stone to earning the Certified Disciplined Agilist certification.

1. Complete training by certified DA Instructor
2. Apply for membership ($50)
Certified DA

Being a Certified Disciplined Agilist (CDA) indicates to colleagues and employers that you have fundamental knowledge about Disciplined Agile strategies and that you are eager to learn and increase your skills and abilities as a software professional.

**How to Become a Certified Disciplined Agilist (CDA)**

**Step 1:**
Attend a Disciplined Agile Lean Scrum Master class from a Certified Disciplined Agile Instructor.

**Step 2:**
Pass the certification test.

**CONGRATULATIONS**

CERTIFIED DISCIPLINED AGILIST
Certified DA Practitioner

Being a Certified Disciplined Agile Practitioner (CDAP) indicates that you are experienced at agile solution delivery and are on your way to becoming a generalizing specialist. You have the potential to be a “junior coach” under the guidance of a senior coach (someone who is likely an agile leader, such as a Discipline Agile Lead Scrum Master or Certified Disciplined Agile Coach).

Step 1:
Earn your CDA designation. You will need to do this even if you have already fulfilled the requirements of step 2.

Step 2:
- Earn your PMI-ACP
- or -
- Gain 2 years of agile team experience, in any role

Step 3:
Submit your application form and pass your reference checks

Congratulations
Certified Disciplined Agile Practitioner

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DA Lean Scrum Master (DALSM)

Being a Disciplined Agile Lean Scrum Master (DALSM) indicates that you:

- Are an experienced leader in agile solution delivery
- Have the potential to lead your team in improving their way of working (WoW)
- Are on your way to becoming a generalizing specialist
- Have the potential to be a “junior coach” under the guidance of a senior coach (someone who is likely a Certified Disciplined Agile Coach)

How to Become a Disciplined Agile Lean Scrum Master (DALSM)

**Step 1:**
Earn your CDA or CDAP designation after 31 December 2019

**Step 2:**
Gain 2 years of agile team experience in a lead role (PO, TL/SM, AO)

**Step 3:**
Submit your application form and pass your reference checks

CONGRATULATIONS
Certified DA Coach

Being a Certified Disciplined Agile Coach (CDAC) indicates that you are a trusted expert with significant proficiency with Disciplined Agile. You can coach other people in disciplined agile strategies and advise organizations in the adoption and tailoring of Disciplined Agile.

How to Become a Certified Disciplined Agile Coach (CDAC)

Step 1:
Earn your
CDAP or
DALSM
certification after
31 Dec 2019
- PLUS -
Gain 5 years of agile experience, including 3 years in a lead role

Step 2:
Attend a Certified
Disciplined Agile Coach (CDAC) for Experienced Agile Coaches workshop from a Certified Disciplined Agile Instructor
- AND -
pass the certification test

Step 3:
Pass your reference checks
- AND -
pass the peer interviews

Congratulations
CERTIFIED DISCIPLINED AGILE COACH
Certified DA Instructor (CDAI)

Do you have what it takes to be a Certified Disciplined Agile Instructor (CDAI)?

Being an Instructor is not about standing in front of a crowd reading through slides. We look for Instructors who:

1. Have an in-depth knowledge, and better yet experience, in Disciplined Agile. Our students prefer when content in a workshop can be related back to their day-to-day environment so our Instructors will often provide their own experience to provide an answer or offer an example.

2. Are effective communicators. Effective instructors have the ability to adapt their communication style when their students “don’t get it”, and patiently go over material as needed.

3. Are adaptable. Good instructors are able to determine the needs of the group, and focus more time on the areas where people’s knowledge and experience are lacking.

4. Have an interest in DA and in providing the best experience for students. If you aren’t really interested, why would they be? If you are not passionate about DA, how can you get buy-in for change? If you believe in DA and providing participants with the knowledge they need to use it, your participants will commit to using DA back on the job.

5. Have empathy. CDAIs should understand the frustration faced by those who want to change and the blockers they face in providing that change.
Certified DA Instructor (con’t)

How to Become a Certified Disciplined Agile Instructor (CDAI)

* Ensure you complete your training with a Disciplined Agile Instructor Trainer (DAIT)

Step 1:
Earn your CDAP, DALSM or CDAC designation

Step 2:
Choose your Training Partner
- AND -
Return the PMI-DA Instructor Agreement

Step 3:
Pay the annual Instructor fee

CONGRATULATIONS
CERTIFIED DISCIPLINED AGILE INSTRUCTOR

You may begin teaching the new courses as you are certified in each
HOW TO FIND TRAINING & MORE INFORMATION ON DA MEMBERSHIP & CERTIFICATION

www.disciplinedagaileconsortium.org
www.disciplinedagiledelivery.com/

Sign up for the free Newsletter!
THANK YOU

DIMITRIS LAZOS
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