The most powerful
Agile measurement & growth platform

AgilityHealth
enabling business agility

AgilityHealth Overview
The goal of measurement should be to enable growth, not for judgment, reward or punishment.
AgilityHealth is a powerful measurement & continuous growth platform designed for companies that want to accelerate the growth and business agility of their organization.
The THREE Metrics that Matter

- **Team Health & Maturity (qualitative)**
- **Delivery/Performance (quantitative)**
- **Business Outcomes (results)**

AgilityHealth is a *single source of record for your enterprise teams* and their maturity, performance and outcomes

www.AgilityHealthRadar.com
**Team Growth**
Enables growth at the Team level. This backlog contains Team Growth and Organizational Items for leaders to address.

**Multi-Team Growth**
Enables growth at the Line of Business, Program or Product levels. This backlog contains Organizational Items from sub-teams and Enterprise Items for executives to address.

**Enterprise Growth**
Enables growth at the Portfolio and Enterprise levels. This backlog contains Enterprise Growth Items from all levels of the organization.
Who Does What?

Org Leader
- Analyze program, portfolio & LOB data
- Remove Enterprise obstacles

Agile Coach
- Multi-team roll up analysis
- Coaching the target teams
- Measure coaching impact

Managers
- Complete stakeholder survey
- Own removal of organizational growth items
- Measure growth

ScrumMaster
- Schedule and attend retrospectives
- Manage team growth plan

The Team
- Complete assessments
- Analyze results
- Build and execute growth plans
Growth Leadership Team - Overview

Leadership team focused on removing obstacles, coaching and helping mature teams to optimize their performance.

Who is Involved?
- Managers
- Agile Coaches*
- DevOps Coaches
- Program Mgrs/RTE*
- Product Managers*

What do they do?
- Review team assessment results
- Prioritize top 2 or 3 obstacles to remove
- Work as a team to manage the org level growth backlog

How do they operate?
- They manage the backlog in AgilityHealth
- They meet weekly
- They demo their progress to the teams monthly or quarterly
Agile Roles & Talent Development (5x4)
5 Roles, 4 Quadrants

- **LEARN**
  - Build Role Specific Learning Roadmap

- **MEASURE**
  - Role Health Radar + Crawl, Walk, Run, Fly Maturity

- **ITERATE**
  - Standup or Stabilize Community of Practice

- **GROW**
  - AgilityHealth Growth Portal
    - Show me | Pair with Me | Enable me
    - Health
    - Recommendations
    - Coaching
    - Videos
    - Enable Self-Learning

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Agile Roles & Talent Development (5x4)
5 Roles, 4 Quadrants

- Sr. Leaders
- RTEs
- Scrum Masters
- Managers & Team Leaders
- Agile Coaches
- Product Owners
Team Health & Maturity
Qualitative Metrics
Maturity labels can be customized.
<table>
<thead>
<tr>
<th>MATURITY STAGE</th>
<th>CRAWL (standup)</th>
<th>WALK (stabilize)</th>
<th>RUN (optimize)</th>
<th>FLY (enable)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>RADAR SYMPTOMS</strong></td>
<td>Most Dimensions below ~ 25%</td>
<td>Most Dimensions ~ 30%- 50%</td>
<td>Several Dimension ~ 60% - 80%</td>
<td>Several Dimension ~ 90%+</td>
</tr>
<tr>
<td><strong>GOALS</strong></td>
<td><em>Bring clarity</em> to team vision, measures for success, backlog, plans and roles. 2- Setup teams on <em>basic Agile ceremonies</em> and core practices. 3- <em>Setup foundation</em> for success (structure, tools, infrastructure, skills, allocation, standards,..)</td>
<td>1- Remove <em>organizational obstacles</em> 2- Strengthen <em>leadership triangle</em> roles 3- Begin cultural journey – Agile leadership, collaboration and conflict mgmt. skills 4- Begin <em>technical agility</em> and DevOps maturity</td>
<td>1- Enable <em>self-organization</em> and lean processes 2- Address <em>enterprise obstacles</em> 3- <em>Strengthen technical agility</em> and DevOps 4- Mature <em>discovery</em> 5- Measure <em>business outcomes</em></td>
<td>1- <em>Optimize business outcome</em> delivery 2- Enable <em>experiments</em> and learning 3- Enable <em>knowledge sharing</em> across teams 4- Enable <em>change agents</em> and leaders 5- Share <em>results</em> and success</td>
</tr>
</tbody>
</table>
Tactical vs Strategic Retrospectives

Release Planning
- Sprint Planning
- Sprint Demo
- Sprint Retrospective

Sprint Tactical
- Sprint Planning
- Sprint Demo
- Sprint Retrospective

Sprint Tactical
- Sprint Planning
- Sprint Demo
- Sprint Retrospective

Release Demo
- PI/ Quarterly Retrospective

Portfolio/Org Retrospective
- Team Health
- Train/Program Health
- Transformation or Portfolio Health

agilityhealth
enabling business agility
Delivery and Performance
Quantitative Metrics
Team Performance Metrics

AgilityHealth integrates with Jira, Rally, VersionOne, HP & others to pull a few quantitative metrics

**Story Points Delivered**

<table>
<thead>
<tr>
<th>Iteration</th>
<th>Actual Points</th>
<th>Target Points</th>
<th>Total Scope</th>
</tr>
</thead>
<tbody>
<tr>
<td>Iteration 1</td>
<td>10</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>Iteration 2</td>
<td>22</td>
<td>33</td>
<td></td>
</tr>
<tr>
<td>Iteration 3</td>
<td>37</td>
<td>56</td>
<td></td>
</tr>
<tr>
<td>Iteration 4</td>
<td>55</td>
<td>76</td>
<td></td>
</tr>
<tr>
<td>Iteration 5</td>
<td>75</td>
<td>101</td>
<td></td>
</tr>
</tbody>
</table>

**Predictability**
- Current % Done: 82%
- Escaped Defects: 22

**Scope Change Percent**
- Average Velocity: 31 Points/Iteration
- 7%

**Customer Satisfaction (NPS)**
- Promoters: 3
- Detractors: 0
- Passives: 1
- NPS: 75
Release Health Metrics

Release Data

- Target Points: 80
- Actual Points: 68
- Target Value: 19
- Actual Value: 45
- Defects: 12

Features Delivered: 85%
Value Delivered: 237%
Escaped Defects: 12

Target Date: 6/09/2015
Actual Date: 6/19/2015
### Performance Scale

<table>
<thead>
<tr>
<th></th>
<th>&lt;5</th>
<th>5 - 7</th>
<th>7 - 8</th>
<th>9</th>
<th>10</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Customer NPS</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Delivery Cadence</strong></td>
<td>Bi-Annually or Annually</td>
<td>Monthly, Quarterly</td>
<td>Bi-Weekly</td>
<td>Weekly</td>
<td>Daily+</td>
</tr>
<tr>
<td><strong>Ability (time to market?)</strong></td>
<td>Bi-Annually or Annually</td>
<td>Monthly, Quarterly</td>
<td>Bi-Weekly</td>
<td>Weekly</td>
<td>Daily+</td>
</tr>
<tr>
<td><strong>Responsiveness</strong></td>
<td>10+ wks</td>
<td>8 wks</td>
<td>6 wks</td>
<td>4 wks</td>
<td>&lt;2 wks</td>
</tr>
<tr>
<td><strong>(Feature Cycle Time)</strong></td>
<td>10+ wks</td>
<td>8 wks</td>
<td>6 wks</td>
<td>4 wks</td>
<td>&lt;2 wks</td>
</tr>
<tr>
<td><strong>Quality</strong></td>
<td>Very Low</td>
<td>Low</td>
<td>Medium</td>
<td>High</td>
<td>0 Sev 1 defects</td>
</tr>
<tr>
<td><strong>(defect density, tech debt)</strong></td>
<td>Very Low</td>
<td>Low</td>
<td>Medium</td>
<td>High</td>
<td>0 Sev 1 defects</td>
</tr>
<tr>
<td><strong>Predictability</strong></td>
<td>&lt;30%</td>
<td>30 – 40%</td>
<td>50 – 60%</td>
<td>70 – 80%</td>
<td>90%+</td>
</tr>
<tr>
<td><strong>Team Happiness</strong></td>
<td>&lt;5</td>
<td>5-7</td>
<td>7 - 8</td>
<td>9</td>
<td>10</td>
</tr>
</tbody>
</table>

- **PRE-CRAWL**: 1-2
- **CRAWL**: 3-4
- **WALK**: 5-6
- **RUN**: 7-8
- **FLY**: 9-10
Program Improvements - Quarterly

**Leadership**
- Decreased by 32%

**Culture**
- Improved by 62%

**Foundation**
- Improved by 110%

**Clarity**
- Improved by 86%

**Performance**
- Improved by 134%
Enterprise Dashboard

Visualize Growth & Maturity Across All Teams

Improvements over the last quarter
Business Outcomes
### Objective Title:

Increase customer conversion

### Hypothesis Statement/Description:

We believe that by improving the usability of Product search and browse pages on our site, we will increase conversions from shopping cart to checkout.

### Key Results / Metrics:

<table>
<thead>
<tr>
<th>Title</th>
<th>Progress</th>
<th>Metric</th>
<th>Now</th>
<th>Goal</th>
<th>By Date</th>
<th>Groups/Team(s)</th>
<th># of Weeks (est)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase checkout conversion</td>
<td>60%</td>
<td>Checkout completion</td>
<td>50%</td>
<td>70%</td>
<td>May 30 2018</td>
<td>Mktg</td>
<td></td>
</tr>
<tr>
<td>Reduce time to find relevant product.</td>
<td>20%</td>
<td>Time between Search to Add to Cart</td>
<td>2min</td>
<td>30 sec</td>
<td>Dec 31 2017</td>
<td>BACA Team</td>
<td>4 Sprints (8 Weeks)</td>
</tr>
</tbody>
</table>

#### Overall Progress:

40%

#### Estimated ROI:

$500,000

#### Estimated Capacity Cost:

$160,000

*Calculated based on # of weeks per team, X avrg. cost per team 20k/week*
# Outcome Definition | Team Level

## Objective

**Title:**
Increase quality and reduce escaped defects

**Hypothesis Statement/Description:**
We believe that by investing in test automation for our critical path customer journey use cases we will decrease the number of escaped defects in production.

## Key Results / Metrics:

<table>
<thead>
<tr>
<th>Title</th>
<th>Progress</th>
<th>Metric (baseline)</th>
<th>Now</th>
<th>Goal</th>
<th>By Date</th>
<th>Groups/Team(s)</th>
<th># of Weeks (est)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer satisfaction</td>
<td>60%</td>
<td>NPS (5)</td>
<td>6</td>
<td>9</td>
<td>Feb 30 2018</td>
<td>Customer Success</td>
<td></td>
</tr>
<tr>
<td>Test automation coverage for critical path use cases</td>
<td>55%</td>
<td>Automation (0%)</td>
<td>20%</td>
<td>100%</td>
<td>Dec 31 2017</td>
<td>LAVA Team</td>
<td>6 Sprints (12 Weeks)</td>
</tr>
<tr>
<td>Reduce escaped defects in production</td>
<td>50%</td>
<td>Escaped defects (14)</td>
<td>7</td>
<td>0</td>
<td>Dec 31 2017</td>
<td>LAVA Team</td>
<td>Included above</td>
</tr>
</tbody>
</table>

## Overall Progress:

43%

## Estimated Capacity Cost:

$240,000

Calculated based on # of weeks per team X avg. cost per team 20k/week
**Objective**

**Title:** Improve customer satisfaction

**Hypothesis Statement/Description:**

We believe that by addressing the top 3 pain points for our top 3 customers we will achieve higher customer satisfaction.

---

**Key Results / Metrics:**

<table>
<thead>
<tr>
<th>Title</th>
<th>Progress</th>
<th>Metric</th>
<th>Now</th>
<th>Goal</th>
<th>By Date</th>
<th>Groups/Team(s)</th>
<th># of Weeks (est)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase NPS score above 8</td>
<td>60%</td>
<td>NPS</td>
<td>5</td>
<td>7</td>
<td>April 30 2018</td>
<td>Mktg</td>
<td></td>
</tr>
<tr>
<td>Conduct 3 customer interview meetings</td>
<td>66%</td>
<td>Interview meetings</td>
<td>2</td>
<td>3</td>
<td>Dec 31 2017</td>
<td>Mktg</td>
<td>1 Week</td>
</tr>
<tr>
<td>Fix top 3 pain points for top 3 customers</td>
<td>55%</td>
<td>Pain Points</td>
<td>5</td>
<td>9</td>
<td>Dec 31 2017</td>
<td>Program Alpha (5 sub teams)</td>
<td>13 Weeks</td>
</tr>
</tbody>
</table>

**Overall Progress:** 60%

**Estimated ROI:** $500,000

**Estimated Cost:** $280,000

*Customer/org Impact metric*

*Estimated ROI: Calculated based on # of weeks per team, X avrg. cost per team 20k/week*
### Objective Title:
Launch new SMB health product to market

### Hypothesis Statement/Description:
We believe that by launching the new SMB health product to market we will increase our market share for small business members.

### Key Results / Metrics:

<table>
<thead>
<tr>
<th>Title</th>
<th>Progress</th>
<th>Metric (baseline)</th>
<th>Now</th>
<th>Goal</th>
<th>By Date</th>
<th>Groups/Team(s)</th>
<th># of Weeks (est)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase SMB membership</td>
<td>50%</td>
<td>Membership (30k)</td>
<td>30k</td>
<td>60k</td>
<td>July 30 2018</td>
<td>Sales</td>
<td>Sales Program</td>
</tr>
<tr>
<td>Launch SBM Health Product</td>
<td>0%</td>
<td>Launch ()</td>
<td>Not Done</td>
<td>Done</td>
<td>Dec 31 2017</td>
<td>Program JAMZ (5 teams)</td>
<td>12 Weeks</td>
</tr>
<tr>
<td>Receive 100 quote applications for new product</td>
<td>0%</td>
<td>Quote (0)</td>
<td>0</td>
<td>100</td>
<td>Feb 2017</td>
<td>MKTG</td>
<td>4 weeks</td>
</tr>
</tbody>
</table>

### Overall Progress:
16%

### Estimated Capacity Cost:
$1,280,000

*Estimated based on # of weeks per team X avrg. cost per team 20k/week*
Kanban View Design

Filter by: Line of Business A

#quality

Strategic Priorities

Quarterly Outcomes

Backlog

Product/Program A

Product/Program B

Top Obstacles

Company level strategic priorities for this year

Quarterly Outcomes not pulled yet by programs/teams

Quarterly Outcomes pulled by this program/dept group

Top organizational impediments impacting current outcomes
## Getting Started - AgilityHealth

<table>
<thead>
<tr>
<th>Stage</th>
<th>Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pilot</strong></td>
<td>• Identify pilot teams and scope&lt;br&gt;• Execute pilot, rollup results, decision to rollout</td>
</tr>
<tr>
<td><strong>Get Baseline</strong></td>
<td>• Assess teams to get baseline of their current health, maturity and performance</td>
</tr>
<tr>
<td><strong>Target &amp; Rollout</strong></td>
<td>• Identify key LOBs with growth potential&lt;br&gt;• Design growth strategy&lt;br&gt;• Train internal change agents and facilitators</td>
</tr>
<tr>
<td><strong>Grow</strong></td>
<td>• Execute growth plan</td>
</tr>
<tr>
<td><strong>Iterate</strong></td>
<td>• Re-assess each quarter&lt;br&gt;• Repeat</td>
</tr>
</tbody>
</table>
Learning Roadmap by Role
Agile Roles & Talent Development

LEARN
- Build Role Specific Learning Roadmap

MEASURE
- Role Health Radar + Crawl, Walk, Run, Fly Maturity

ITERATE
- Standup or Stabilize Community of Practice

GROW
- AgilityHealth Growth Portal
  - Health
  - Recommendations
  - Coaching
  - Videos

Show me | Pair with Me | Enable me

Enable Self-Learning

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Agile Leaders and Managers Learning Roadmap
One workshop every ~3-4 months

Sr. Leaders

- Leadership Agility 1 Day
- Enabling Business Agility 2 Day Seminar + Workshop
- Tactical to Strategic Leadership
- Effective Facilitation & Collaboration

Managers & Team Leads

- Agile Leadership 2 Days
- Leading High Performing Teams 2 Days
- Effective Facilitation & Collaboration 2 Days
- Tactical to Strategic Leadership 2 Days
RTEs and Agile Coaches Learning Roadmap
One workshop every ~3-4 months

**RTEs**
- Real World Agile for Teams (3 Days)
- Leading SAFe (2 Days)
- SAFe Release Train Engineer (3 Days)
- Effective Facilitation & Collaboration (2 Days)

**Agile Coaches**
- AgilityHealth Facilitator Certification (1 Day)
- Scaling Measurement and Growth (1 Day)
- ACI Coaching Agile Teams (3 Day)
- AgilityHealth Agile Coach Certification (3 Days)
SMs and POs Learning Roadmap
One workshop every ~3-4 months

Scrum Masters

- Real World Agile for Teams
  - 3 Days

- Leading High Performing Teams
  - 2 Days

- Effective Facilitation & Collaboration
  - 2 Days

- Leadership Triangle Collaboration
  - 1 Day

Product Owners

- Real World Agile for Teams
  - 3 Days

- Agile for POs Deep Dive
  - 2 Days

- Agile Leadership
  - 2 Days

- Leadership Triangle Collaboration
  - 1 Day