

Bob Schatz, Owner and Senior Consultant, Agile Infusion, LLC



This is the first in an occasional series of interviews and technical discussions with selected project management specialists, educators, and service providers published in the PMI NAC Newsletter. Our goal is to supplement our top management interviews with special features that further enhance the project management knowledge of our readers.

Bob Schatz is a Certified Scrum Trainer and a leader in the agile community. He has helped many companies transition to agile development methods.

In this interview, Bob introduces readers to Scrum basics and its background – and he highlights key points that help make a difference for users around the globe.

Agile Infusion, LLC – Bob Schatz is owner and Senior Consultant of Agile Infusion, LLC. He has been a leader in the agile community and has helped many companies in their transition to agile development methods. Prior to this, Bob served as VP of Development for Primavera Systems, Inc. where he was responsible for leading the team that develops Primavera's software solutions for Enterprise Project, Resource, and Portfolio Management. This is where he worked with Ken Schwaber and Bob Martin to create a true agile success story in the transition to using Scrum and XP. Before joining Primavera, Bob spent seven years at Liquent, Inc., managing the development of publishing software targeted for the pharmaceutical market, and 12 years at GE Aerospace / Lockheed Martin, where he held management assignments on large-scale development projects for US government agencies and the Department of Defense. He holds a bachelor's degree in Computer Science from Temple University and is currently pursuing a Masters degree in Organizational Dynamics from the University of Pennsylvania.

Bob is a leader in successfully implementing agile development techniques, such as Scrum and XP, and driving culture changes in organizations. He and his team have been featured in a number of industry articles. Bob often speaks at industry events talking about the benefits and challenges of bringing agile techniques into an organization.

Visit <http://www.agileinfusion.com> for more information on Bob Schatz, Agile Infusion, and the Scrum Master Training course in Huntsville March 19-20.

The Scrum Alliance – The Scrum Alliance is a non-profit organization committed to delivering facilities, stories, courses, and other materials that will help Scrum users be successful.

Founded by Ken Schwaber, Mike Cohn, and Esther Derby, the Scrum Alliance's mission is to promote increased awareness and understanding of Scrum, provide resources to individuals and organizations using Scrum, and support the iterative improvement of the software development profession.

Visit <http://www.scrumalliance.org/> for more information about the Scrum Alliance and its activities.

PMI-NAC: *Our readers may be curious about Scrum and Scrum Master Training. Can you give us a brief introduction to the vocabulary and basics of Scrum?*

Schatz: Scrum is a project management framework that helps us manage agile projects. It has its roots in lean manufacturing and works very well in high-change environments.

Scrum is a term from the game of rugby. A team gains possession of a ball and works together using their skills and abilities, passing the ball back and forth, moving towards a common goal. The opposing team presents obstacles to meeting that goal. The team works together to remove the obstacles and move forward.

This concept and the term “scrum” were first used in a project management context in a 1986 Harvard Business Review article, *The New New Product Development Game*.¹

The software industry began a real push to adopt lean and agile practices in the late 1990s and early 2000s. Given our less than stellar project success metrics, and the erosion of quality of life for many IT workers, a change was needed.

Scrum is a project management framework that helps drive a time-boxed, iterative, incremental approach focused on empowered teams and producing high-value, high-quality software.

The simple workflow and disciplined approach allows everyone to work at a sustainable pace, while increasing the value throughput. It embraces change and gets business and IT organizations collaborating with the user community to converge on value.

Scrum will drive many positive changes in the culture, but the price to be paid is that it will expose all of the current issues in the organization. Then it challenges you to do something about them – quickly.

Scrum has been used successfully on many types and sizes of projects since 2001. It is being used with great success in many Fortune 500 companies today.

One of the key roles in Scrum is the Scrum Master. The Scrum Master is a coach and facilitator for a Scrum Team. Scrum Masters are responsible for guiding teams in the use of Scrum. They also have the important responsibility to facilitate the removal of obstacles so the team can increase its speed. They work with the entire organization to teach them how to maximize the value created by their high-performance teams.

Through the Scrum Alliance (<http://www.scrumalliance.org/>), the Scrum community has worked to establish a certification for new Scrum Masters to ensure that they have been properly trained in the details of Scrum and the techniques to use it successfully in their organizations. They are taught how to be better change-agents and leaders.

Scrum Trainers are the only individuals certified to provide Scrum Master training. We have some 40 Certified Scrum Trainers worldwide – and we have trained and certified more than 16,000 Scrum Masters since 2001 – and that number is growing quickly as more companies adopt Scrum. A 2-day course is required to become a Scrum Master.

PMI-NAC: *For our readers with significant project management experience and familiarity in using PMI project management principles and processes – how will Scrum concepts and processes benefit us as we work to manage our projects?*

Schatz: As the former Vice President of Development for Primavera Systems, Inc., I have worked with project managers from all over the world.

I've seen project management in many forms. From massive construction projects to engineering projects, to IT, and software development. I have managed many large enterprise software and IT projects in government, pharmaceutical, and commercial environments.

I worked with DOD, FDA, CMM, and ISO processes. I've felt the pain of doing things the same way over and over again. I began to believe that this is just the way it is. Project management was seen as the task masters, taking all of the responsibility, but having no authority.

The principles and processes I learned made logical sense, but we always seemed to have a hard time following them. One day, while getting ready to introduce my team to yet another death-march project, I had an epiphany. I wasn't going to lead this team down that path again, they deserve better than that. They trusted me to lead them, and it was time to lead them in a new direction.

I stumbled on Scrum and realized it was a better answer. It didn't ask us to throw out our processes, it forced us to do things in smaller increments and embrace change. We work with end users to understand their needs and we work towards the best solution within the constraints of the project. It makes project management easier and gets the organization to share responsibility so that everyone gets to focus on the goal.

I also remembered the times I had very successful projects and how I focused on being a coach and facilitator to guide large teams to have great success – rather than being that task master. Scrum helps package the processes we have – so we get greater speed-to-value while preserving our most critical resources – our people.

PMI-NAC: *Can you provide some details on what the Scrum Alliance brings to the table – and a little bit about your activities in this discipline?*

Schatz: The Scrum Alliance is a non-profit organization focused on the community of people around the globe using Scrum. Its website connects the growing community of people using Scrum.

Scrum has been successful due mostly to the collaboration of people using it. People and companies share valuable information allowing everyone to learn from the experience of others. The Scrum Alliance manages all of our training programs and ensures that only the most qualified professionals are teaching Scrum concepts and techniques.

Anyone going to the Scrum Alliance website will find a wealth of information, articles, and resources to help them learn more about Scrum and what it can do for any organization.

The Scrum Alliance also sponsors the Agile200x conference every year, and conducts a Scrum Gathering where people come to share experiences, challenges, successes, and failures. The goal is always to improve what we do in order to create great software.

I became a Certified Scrum Master in early 2003. I think I was around number 85. Many of those before me – were people in my organization – so we were very early adopters.

I also have had the very fortunate opportunity to work with Ken Schwaber, one of the creators of Scrum. I have been a leader in the agile and Scrum community – and I am a regular contributor to the website and an active leader in the Scrum Alliance. So you can see – I'm committed to what Scrum delivers to the teams and organizations that use it and I've seen case after case where Scrum has made a tremendous difference.

After the success we had at Primavera – I began teaching other companies around the world in how to use Scrum effectively to improve their organizations. I now own my own consulting / training practice and work with companies and government organizations including NASA, SAP, HP, H&R Block, Scripps Networks, Jewelry Television, Intergraph, Nortel Networks and a number of other global enterprises.

PMI-NAC: *Later this month you will be delivering a course here in Huntsville to train Scrum Masters. Can you tell us how project managers / PMPs will benefit by attending – and what earning the Scrum Master Credential will mean to our PMPs?*

Schatz: Project managers working with projects – where change is a constant force to deal with – will benefit most by having this new tool in their toolboxes. Much of what we have been taught in the past has not really dealt with the high-change environments very well. Project managers in the software development disciplines will certainly understand this. But it should be emphasized – Scrum is so versatile – and because it is people and team focused – it is extensible virtually anywhere where there are high stakes, risks, and complexity driving the project team on its path.

The Certified Scrum Master course is the first step on the path into the Scrum Alliance. Obviously – I recommend it highly to those in the IT professions and in the technology and project management disciplines. The course will provide students with 2 days of focused training on the values and principles of agile and Scrum.

They will gain a tremendous volume of knowledge and information through stories based on my experience in many different situations. Scrum Masters from NASA and Intergraph that have been using Scrum – will also assist me and participate in this course – so they will provide their own insights that hit home for Huntsville students new to Scrum.

Students will have the opportunity to learn about the benefits and challenges of agile project management – and they will gain valuable leadership skills they can apply no matter what management process they're using.

Each student who completes the course earns a certificate through the Scrum Alliance. Students who are also PMPs – will be eligible for 16 PDUs through PMI.

PMI-NAC: *If you look out five years – what do see as the long-term potential of users of Scrum – and do you expect additions and new Scrum products in the coming years?*

Schatz: Scrum has been applied at an increasing rate over the past 5 years. It is gaining popularity because it's producing results for both the business and development teams using it. It has been very exciting seeing company after company pick up Scrum and start gaining benefits. It has had such a positive impact on the organizations using it.

Scrum simply makes sense for teams that have been struggling to find the right approach to solving big problems over long time periods. The skills and techniques from Scrum are things that made me successful in the past long before Scrum came into existence. The approach will live on for many years to come. Someday – Scrum may be so well known, understood and widely applied that we can retire the term “agile project management.”

What students will learn in this class – is that Scrum is one of the best approaches for managing projects – where *uncertainty* is the only constant.

Scrum continues to grow and evolve as people apply it in more and more situations – and then share their experiences with the rest of the Scrum community.

Thanks to Bob Schatz, Agile Infusion, LLC and the Scrum Alliance for information about their organizations and activities provided for use in this interview published in the PMI-NAC Newsletter.

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1. Takeuchi, H. and I. Nonaka, The New New Product Development Game. Harvard Business Review, 1986 / January-February