

## **Bob Schatz, Owner and Senior Consultant**

### **Agile Infusion, LLC**



*This interview with Bob Schatz was requested to add his insight to the efforts of our PMI-NAC members and others in the community who have taken their first big steps to establish an Agile / Scrum Local Interest Group (LIG).*

*In this interview, Bob adds depth and detail to his first interview from March 2008. He also highlights some key linkages between PMI and Agile / Scrum that help make this a valuable management approach in these turbulent and challenging economic times.*

**Bob Schatz was interviewed for the PMI-NAC Newsletter by Don Ross, PMP**

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**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 working to complete his Masters degree in Organizational Dynamics at 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 Scrum Master Training courses.

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**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:** *Since our last interview – tell us where in the world you've been and where you are seeing big demand for Scrum instruction and techniques?*

**Schatz:** In 2008, I have continued to travel the globe for a number of large software organizations. Since we last talked, I have been to Canada, Germany, Norway, Israel, China, and Singapore as well as working in the United States.

Demand for Scrum training and coaching is global due to the nature of large enterprises and their locations. These companies are seeing the success of agile and want to make sure they don't miss the boat.

Scrum has continued to grow in software development organizations everywhere you look regardless of culture and language. In order to collaborate across boundaries, these people are learning to speak a common language so they work more effectively together.

In some key respects, Scrum has become part of the common language and culture that they all share.

There is a great deal of interest in Scrum and Agile techniques starting to develop now in mainland China. From a cultural perspective, the Chinese are very accustomed to teams working together – so they are very quick to appreciate the benefits of Scrum in software development and IT engineering environments.

Of course, there is a great deal of interest in Scrum across the United States in major software development markets including Boston, Philadelphia, Washington, DC, Silicon Valley, Atlanta, Los Angeles – and Huntsville to name a few. I've been to Toronto and Montreal in Canada – but I'm still searching for an opportunity to teach a class in Mexico. Perhaps that will happen in 2009 along with other opportunities in Latin America.

European firms are strong advocates of Scrum. I have had teaching engagements in several European cities this year focused in Norway and Germany.

*[For those who missed an explanation of Scrum in March 2008 – Scrum is a term from rugby. The rugby team gains possession of the ball and works together using their skills and abilities to pass the ball and move towards a common goal. The opposing team presents obstacles to meeting that goal. The team works together to remove obstacles and move forward. See <http://www.northalabamapmi.org/Newsletter/March2008.htm>]*

**PMI-NAC:** *Given the shocking economic events we've seen in the past 3-4 months, are you seeing big changes in demand for Scrum instruction and techniques?*

**Schatz:** The impact of the economy has hit companies all over the world. For a brief moment, the world thought this was an American problem. Then, the reality of just how much we have created a global economy came to light.

A few companies have “circled the wagons” and cut off external training / consulting as an immediate cost cutting measure. Smart companies see these events as a wake-up call and see this as a time to seriously change the way they do business and find more effective ways to produce value for their customers and shareholders.

Software organizations have known for a long time that change is necessary. They also understand there are new ways of thinking that have proven to be successful. Times like this should increase the sense of urgency and highlight the need for change.

Business has been good this year and I believe demand for Scrum training and Agile education in general will continue to do well. That's true for several reasons.

To speak to the point of your question, companies and students coming to learn Scrum are just not satisfied with the status quo. They are all too familiar with the experience of big waterfall-style projects that fail to meet customer expectations, bust budgets, miss schedule milestones, and cause staff to burn out and turn over.

Even more to the point, the companies and students coming to learn Scrum are looking for competitive advantages in the marketplace. For many firms and practitioners in the field, Scrum offers the possibility of a paradigm shift over the traditional approaches.

Another part of being competitive in this challenging environment is taking care of your top performers. Companies do not want to lose their top talent and they are looking to improve the work experience and the work environment to attract and retain the best people. Today, more companies see Scrum and Agile education from this perspective.

The current economic environment will sort out more effective and efficient firms from those that can't change. The apparent oversupply of services and assets across many markets around the globe puts buyers in the driver's seat to get the very best deals and performance possible from their suppliers. In my view, that's a key reason Scrum is a successful approach to doing business.

***PMI-NAC: At the recent PMI meeting in Denver – we learned PMI Global is using Agile techniques to develop its software / computing infrastructure. What does this mean about blending Agile and PMI project management techniques?***

**Schatz**: While I have not worked directly with managers and staff at PMI Global, I know that they are very smart and savvy about finding the best tools available to help manage and execute their IT and other projects.

I'm also aware that PMI is working on its own guidance that will further define parallels and relationships between Agile techniques such as Scrum and the PMI approaches to project management.

As I've explained before, Scrum does not require users to abandon existing processes and procedures. Instead, it offers a change of focus in my view. We look at the parts of the problem in different ways – emphasizing what end users really need in the delivered product and looking at truly critical parts and pieces on the path to satisfy those needs.

To accomplish this, we break down complex business problems into simpler components than traditional techniques. Combined with more direct and open communication among members of work teams – we also improve the “workplace geometry” and collocation to get teams working together more closely than in old “cube worlds.”

One of my PMI friends describes a Scrum “Sprint” as a mini-project. That is an apt way of characterizing a key Scrum element from a PMI perspective. In my experience, PMI and Agile / Scrum approaches place great emphasis on the importance of people.

It is a simple fact that we have *nothing* without the people who create, innovate, and think up the brilliant ideas to make our projects succeed. That emphasis on people brings with it a great deal of respect for the individual doing the work – and the overriding need for us to treat all parties in the process in an ethical, fair, and principled way including the subtle differences that accrue based on our cultural differences.

Thus, I have found in my analyses, that there is a great deal more in common between Scrum / Agile techniques and PMI than there is that separates these two approaches to management – and I would predict a long and beneficial association between them.

**PMI-NAC:** *Do you have any advice for PMI-NAC and our industry colleagues as we go forward with our chapter's Local Interest Group on Agile / Scrum?*

**Schatz:** First, I applaud this effort by your chapter and others here in Huntsville. There are many potential benefits in starting your PMI / Agile interest group. In my awareness there are very few such groups in North America today. Your group will be a pioneering pathfinder effort as well.

The best advice you can follow flows directly from key guidance in each approach. That is, communication is really the central factor to your success. I believe PMI identifies the role of the project manager as involving about 90 percent of the manager's time as the chief communicator of the project.

While there are no hard and fast percentages associated with Agile and Scrum, there is no difference in emphasis. There is simply no flow of ideas and information without the constant and continuous follow of communication across projects, work teams, and the individuals working together to solve business problems.

As long as you communicate you have the chance to succeed. In my experience, the more you communicate – the more likely it becomes that you will succeed.

**PMI-NAC:** *What's in store for Agile Infusion and Bob Schatz as we step into 2009?*

**Schatz:** One of the top goals on my list for 2009 is completion of my master's degree at the University of Pennsylvania. For me, this is about the journey I began many years ago on the path to finding a better way to do software development and the IT business.

My experiences in Organizational Dynamics have helped to drive me through personal growth and career changes over the years. As I grew, I was transforming myself, trying to find a place where I could have the greatest impact. Finally, it led me to something I love to do that also allows me to give back something to people working in our profession.

It isn't common for a technology manager to focus on Organizational Dynamics for an advanced degree. It's more common to see something in Computer Science or an MBA.

I never wanted to pursue those degrees because I always felt there had to be something deeper in dealing with creative people in the field of Software Development.

My clients often want to know how I got the experience and insight to provide the training and coaching that help them with so many organizational change issues. Many of them also become excited and enthusiastic about the ideas and concepts I teach. Some see it as an enlightened approach in dealing with people and organizations. But I'm not a guru!

I just feel extremely lucky to have had the opportunities to deal with a number of different circumstances through the years, and the ability to communicate in a way that resonates with people in my field.

My personal drivers have been my interest and passion in learning about how people work together and a real desire to help them have more rewarding experiences in their projects. People should have good stories as they move through their careers.

Based on that perspective, I expect 2009 to be a really great year for Bob Schatz, Agile Infusion – and for your own PMI Agile Interest Group. Good luck with your efforts and let me know if you need any help with building your team.

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