

Managing Opportunities and Work in a Medium to Large Chabad Using Agile Principles

October 31, 2013

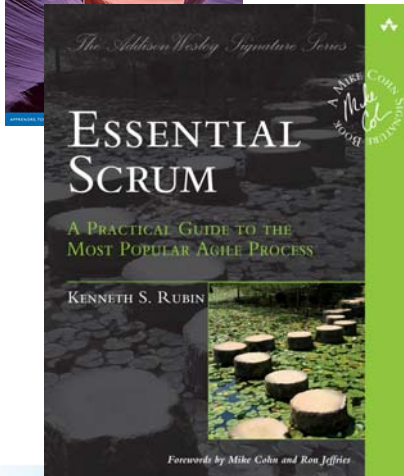
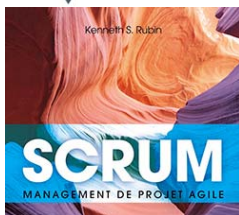
by Ken Rubin

www.innovation.com

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Background of Ken Rubin



Trained over 20,000 people

Coached over 200 companies ranging from startup to Fortune 10

#1 Best Selling Author on Amazon

Ran worldwide non-profit organization that today has 200,000 members

Worked at 10 start-up companies, as well as large companies like IBM

Raised over \$150m in venture capital funding

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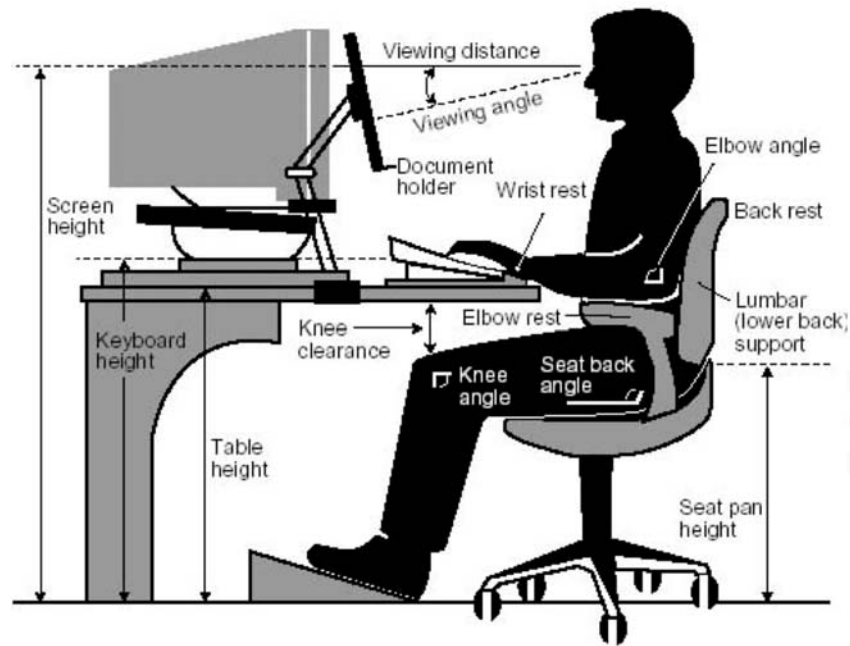
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 I'm not here so you can help me perform mitzvot!



✱ I'm not here to...



✱ I am here to help you..

Apply the same Agile principles that successful high-technology companies use to manage their work and opportunities

STANDARD & POOR'S

KAISER PERMANENTE

LOCKHEED MARTIN

LEGO

WARNER BROS.

intel

CNN

GOLF CHANNEL

JPL
Jet Propulsion Laboratory

hp

DISNEY
INTERACTIVE STUDIOS

GOLF CHANNEL

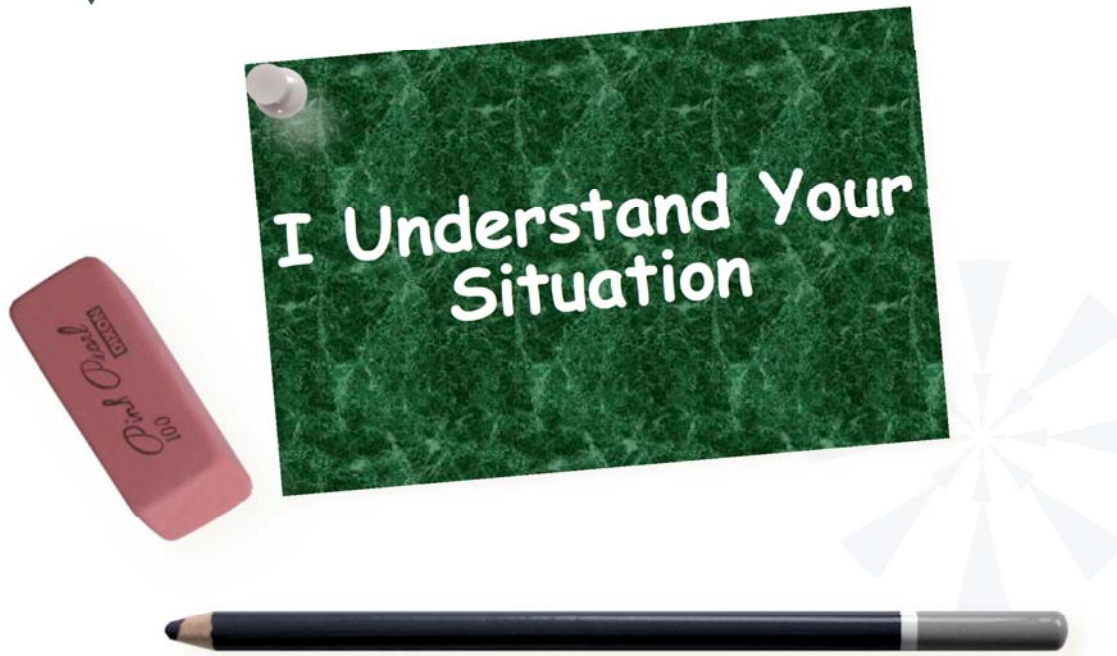
YAHOO!

verizon

NOKIA
Connecting People

at&t

SIEMENS



Life of a Shliach



🌟 Congratulations on achieving a sizable outreach presence!

You have a medium to large Chabad

Perhaps you supervise multiple Chabad houses

Multiple Shlichim and staff work for you

You have a large synagogue

Maybe you have a full-time Yeshiva

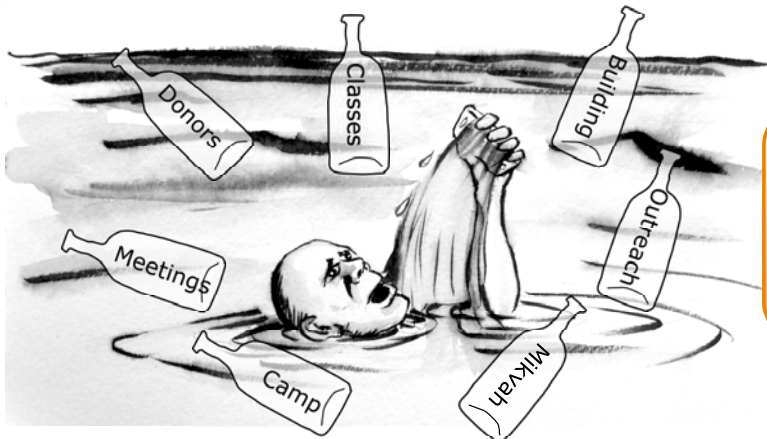
Summer camp draws 100s of children each year

Perhaps you are planning a multi-million dollar facility for special needs children



🌟 Problem summary

You have money, but you still have to effectively and efficiently manage your work



You're also drowning in a sea of opportunity



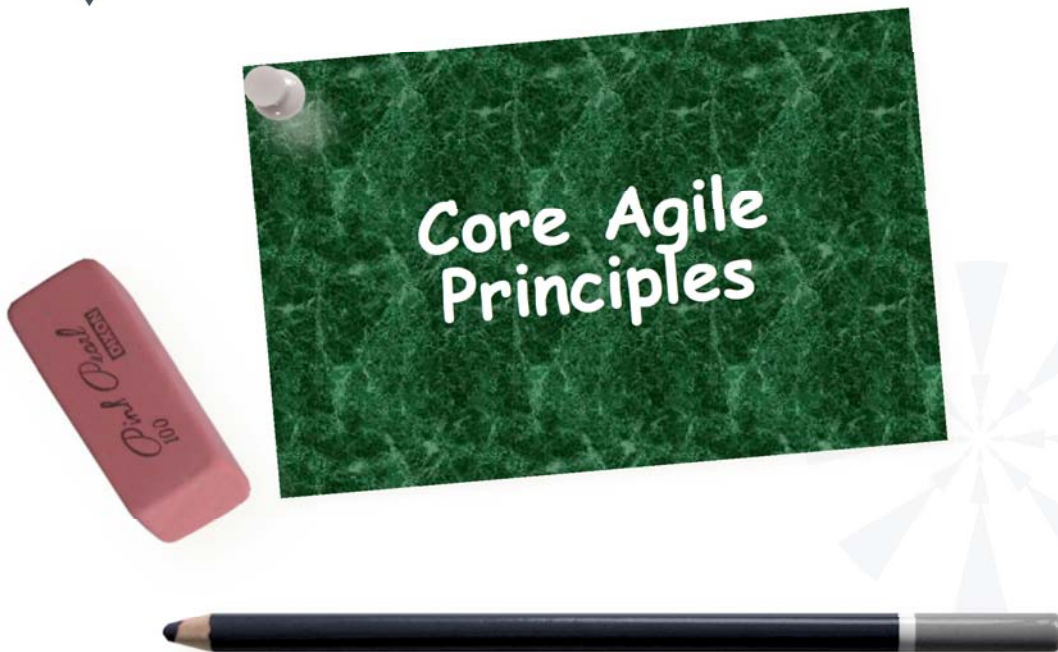
✦ So how can I help you?

Discuss Agile principles that can assist you in determining:

What work you should do

How should you prioritize the work

How to plan and manage the work



Agile is based on a set of core principles

These are just some of the Agile principles

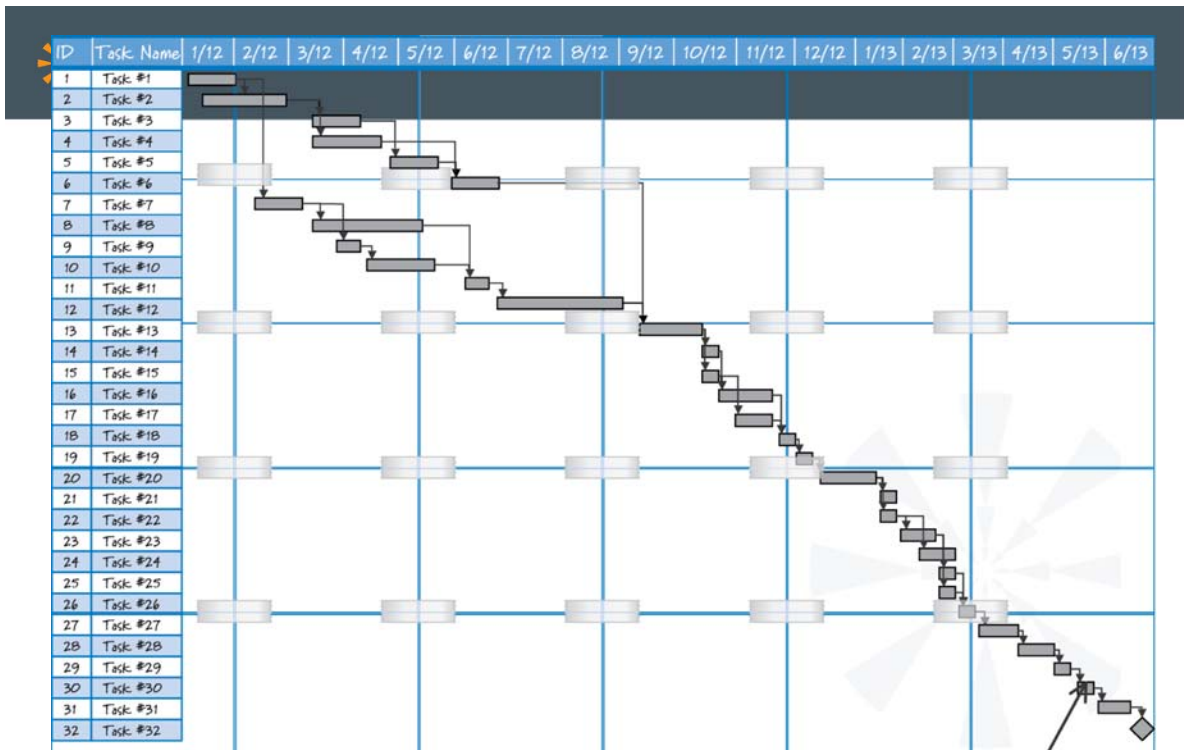
Assume you can't plan it all correctly up front

Keep your options open

Continuously inspect and adapt

Validate assumptions by getting fast feedback

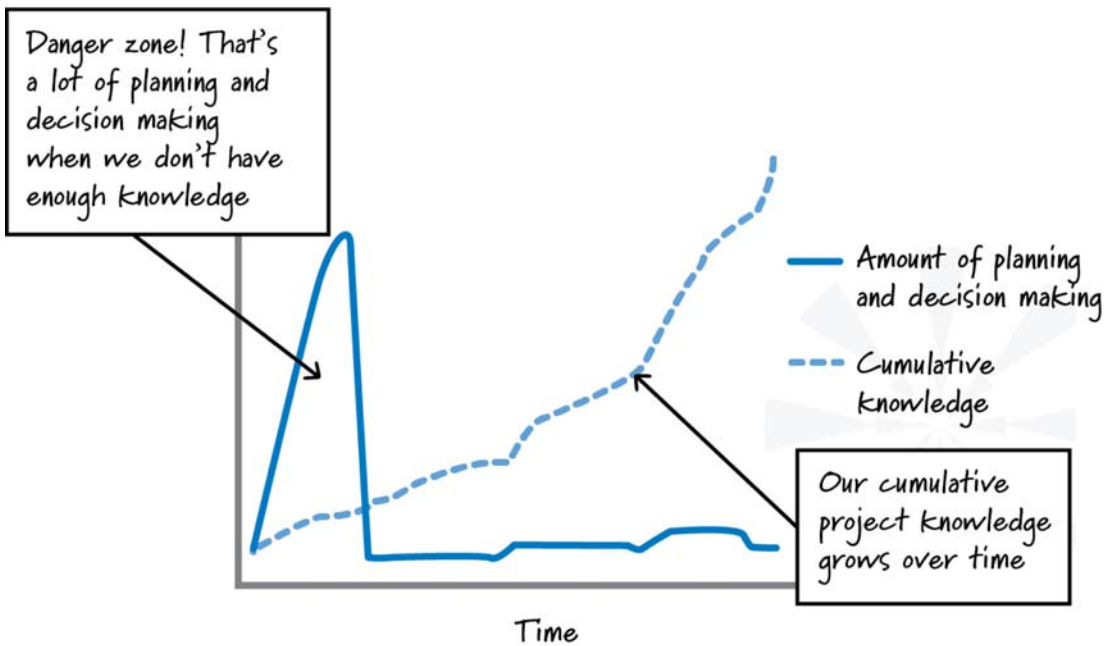
Work in small batch sizes



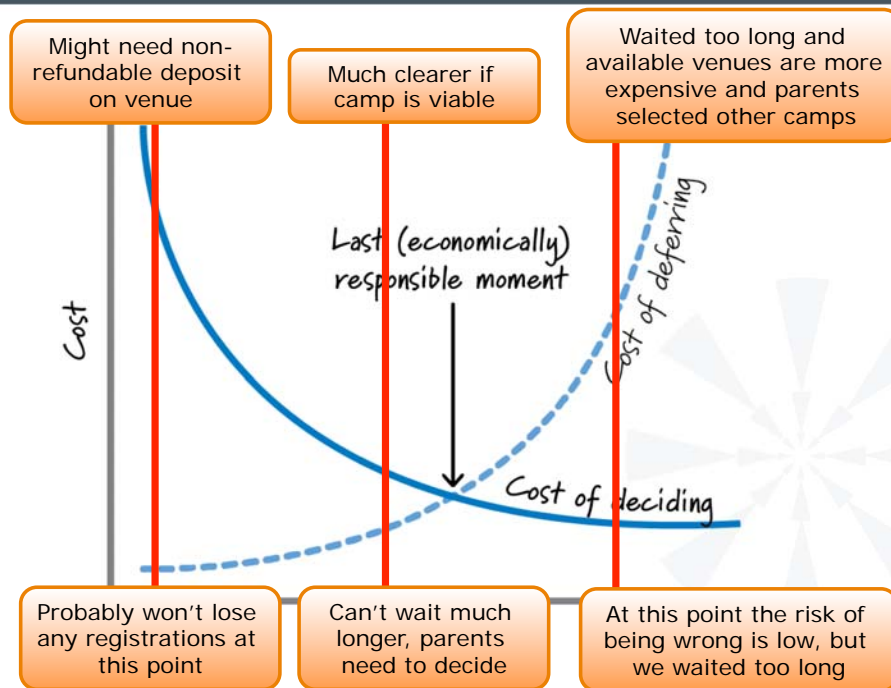
David 18 months from today



✿ Can't get it right upfront



✿ Camp Gan Israel – keep your options open



✦ Continuously inspect and adapt



Try something

See how it works out

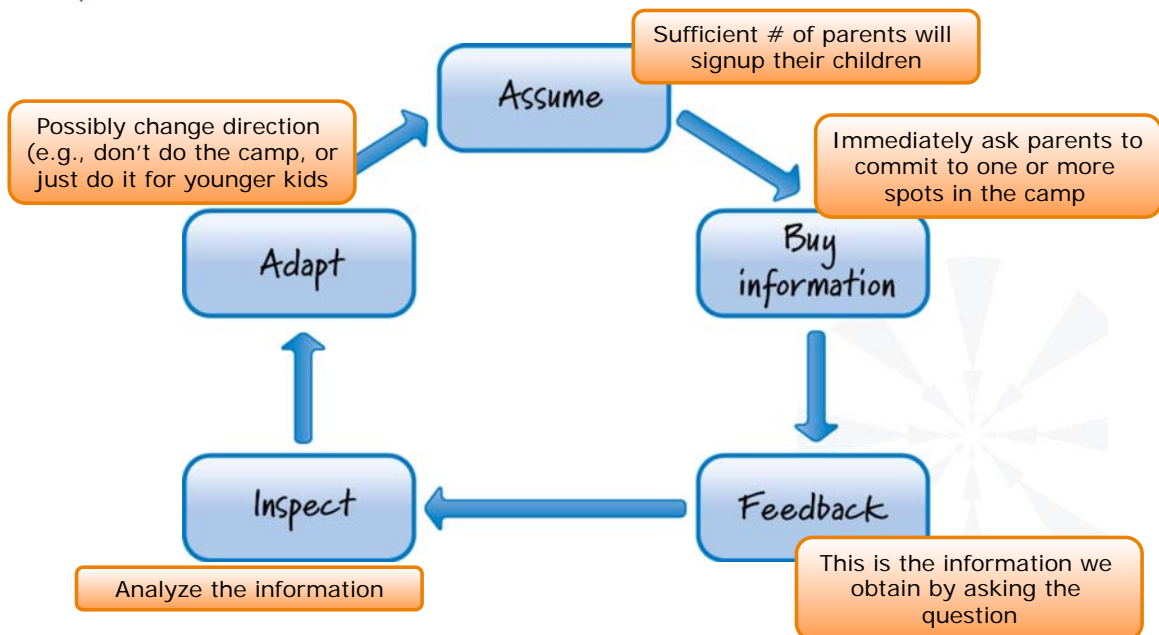
Inspect the results

Change what we do

Change how we do it



✦ Validate your assumptions with fast feedback – Camp Gan Israel

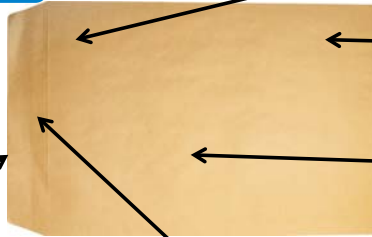
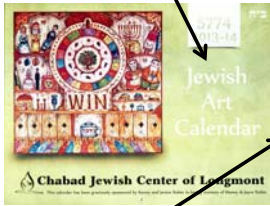


Work in small batches

Goal: Send out 500 Chabad calendars

1. Calendar needs to be folded

3. Envelope needs return address label



5. Envelope needs stamp

4. Envelope needs delivery address

2. Calendar needs to be inserted into envelope

6. Envelope needs to be sealed

- Option 1: Do step 1 for all envelopes, then step 2 for all envelopes, then step 3 for all envelopes, etc.
- Option 2: Do all steps for first envelope, then all steps for second envelope, etc.



✦ Basic idea

- ✦ Break down a large project or effort into smaller, more manageable pieces
- ✦ Organize into cross-functional teams
- ✦ Work in short-duration cycles called iterations or sprints (typically a week to a month in length)
- ✦ We do the most important work first, and get it done by the end of a sprint
- ✦ Inspect and adapt the work
- ✦ Inspect and adapt the process



✦ An agile approach

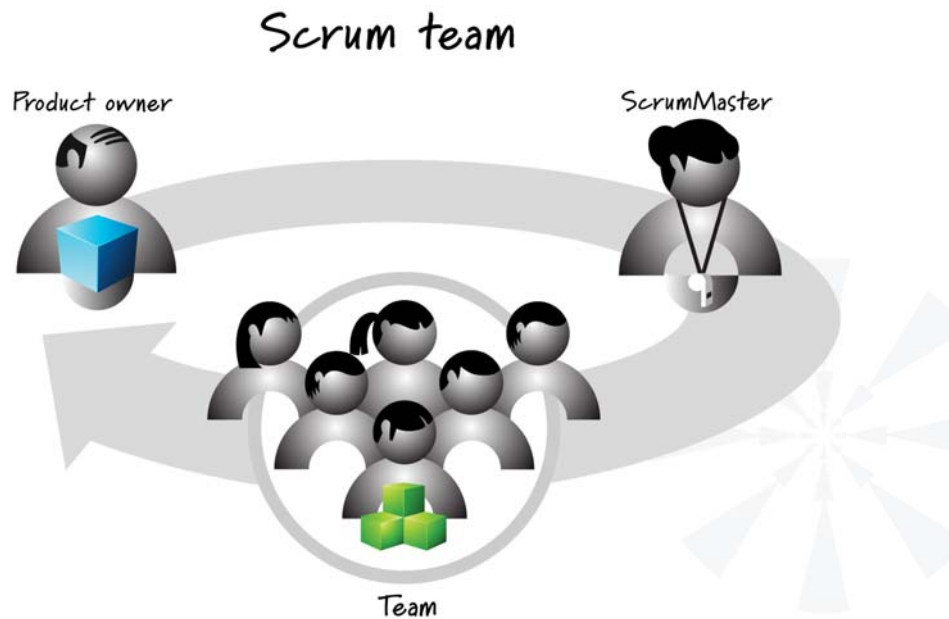
Product Backlog



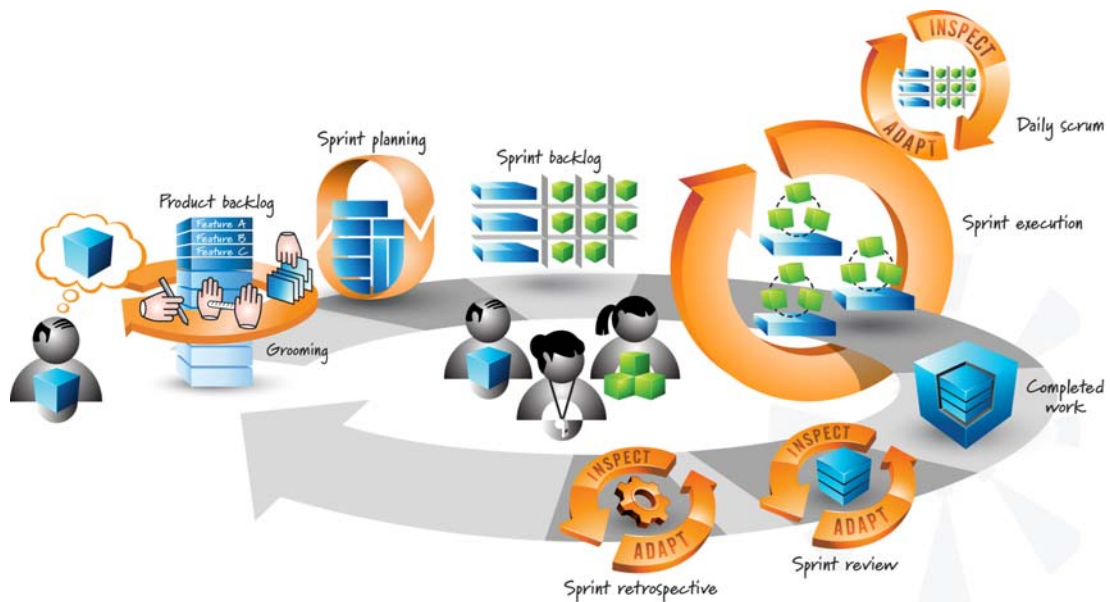
Iteration (1 week to 1 month)



Scrum team



Scrum framework



✦ Prioritized product backlog



This is Prioritized Product Backlog

- Determine the dates
- Secure the venue
- Hire the counselors
- Secure transportation
- Create the flyers

- ✦ Owned by Product Owner
- ✦ Captures work that needs to be done
- ✦ Prioritized so that most important work is at the top of the list



Product owner



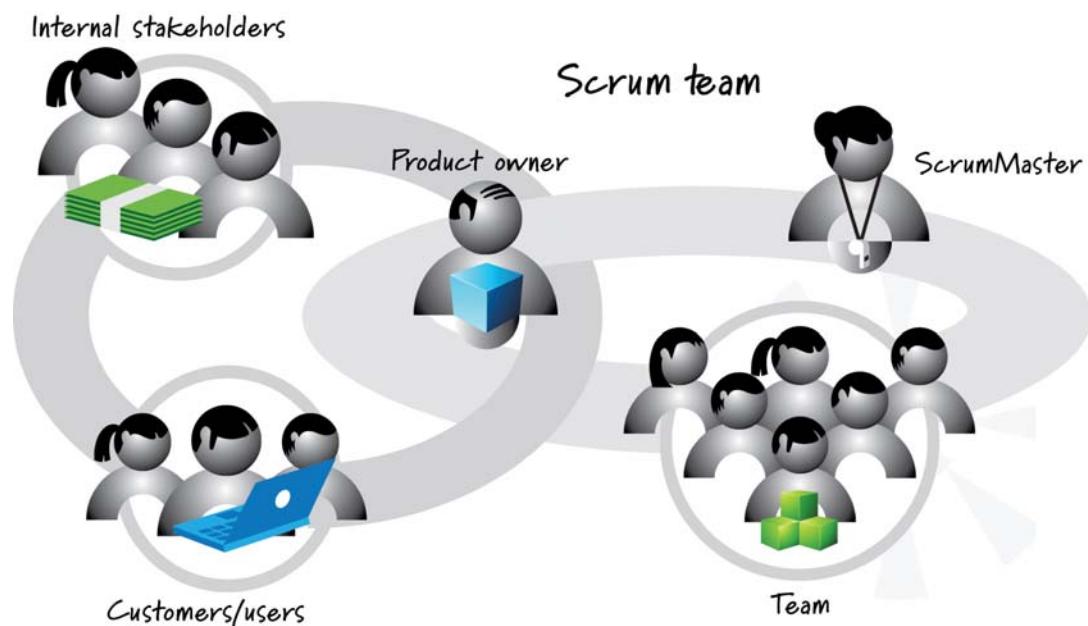
Empowered central point of project leadership

Single voice for communicating what work to do and in what order to do it

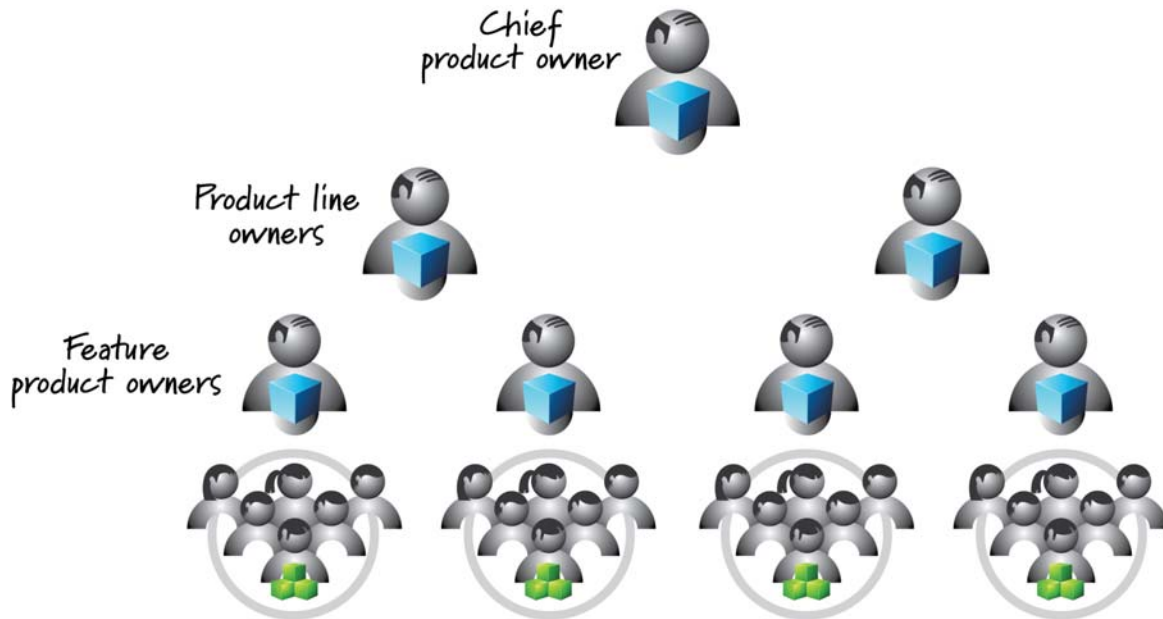
Responsible for making sure resources are used in a sensible way



Product owner connects stakeholders and Scrum Team



Scaling the product owner



ScrumMaster



Agile coach

Process leadership

Facilitator

Impediment remover



Team



Self organizing

Cross-functionally diverse and sufficient

Five to nine people (on average)

Works at a sustainable pace



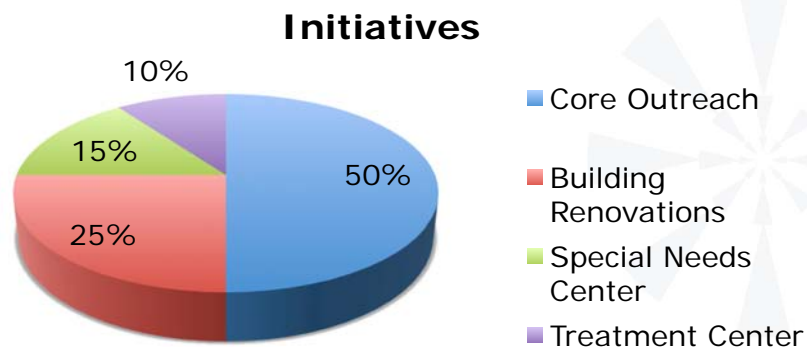
✦ You need to have a clear mission

Example Mission:
Perform excellent outreach to every single Jew in a lasting, influential and Rebbe-worthy way in my geography

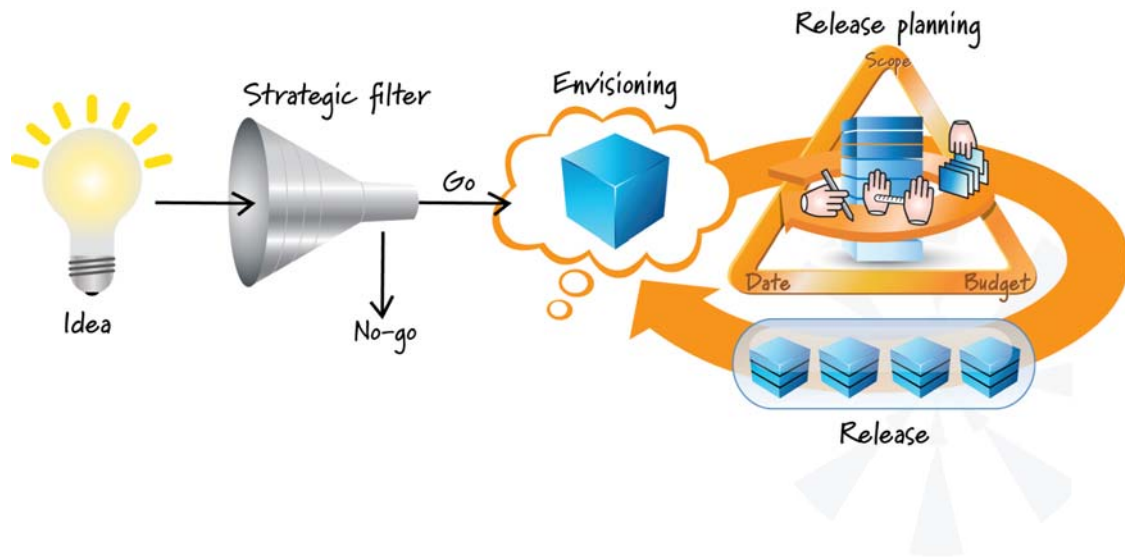


✦ Strategy / Initiatives

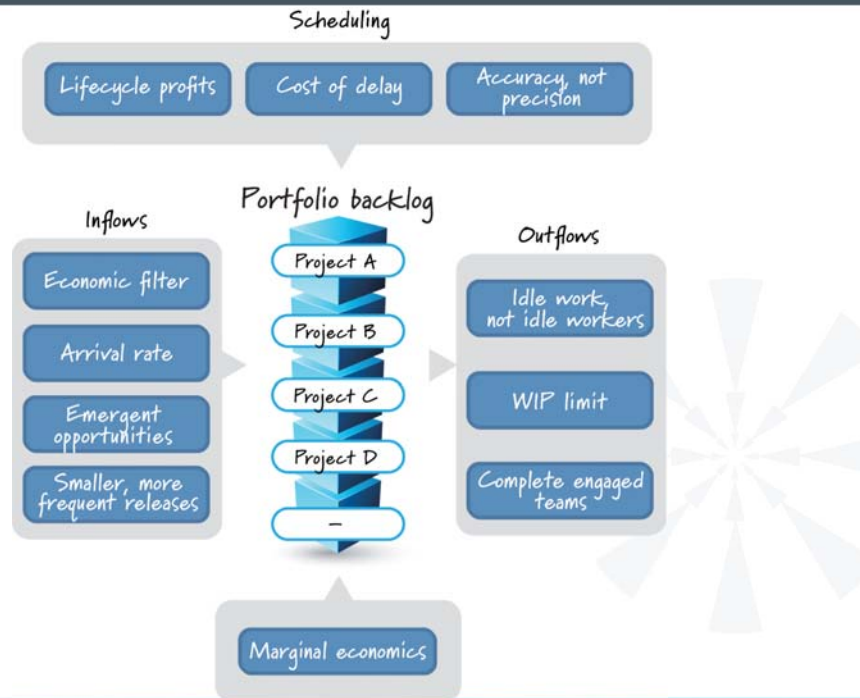
- ✦ What are your overarching goals for the year?
- ✦ What % of your budget you want to allocation to different initiatives (investment themes)?



Opportunities pass through a strategic filter



Portfolio planning strategies



In-process
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You need money

- ✱ Without money it is difficult (impossible) to fulfill your mission as a Chabad outreach emissary
- ✱ Good companies, like you, have a mission that transcends money

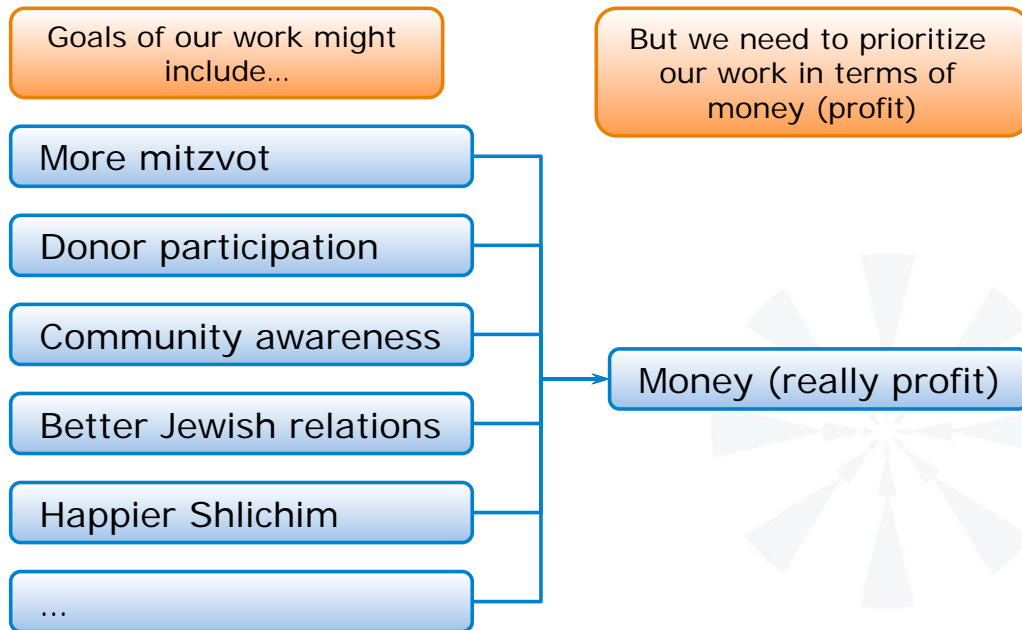


Give people the power to share and make the world more open and connected

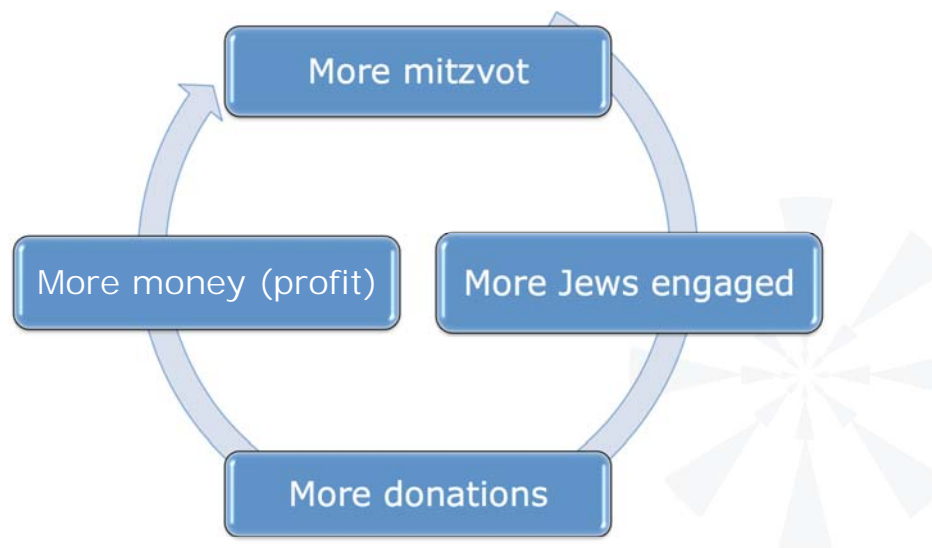
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☀ Money (profit) funds outreach



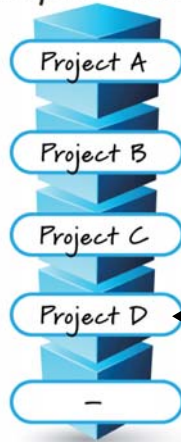
☀ Self reinforcing virtuous cycle



✦ Cost of delay

If you delay work what would be the cost of that delay (in money/profit)?

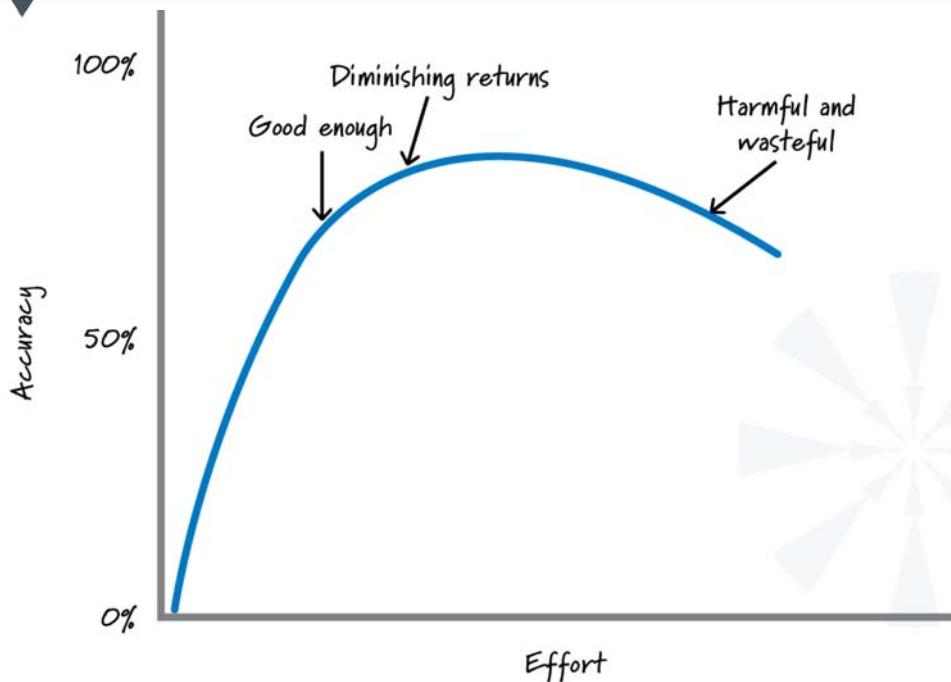
Portfolio backlog



Items further down in the list get worked on later, so they are delayed



✦ Effort versus accuracy when estimating



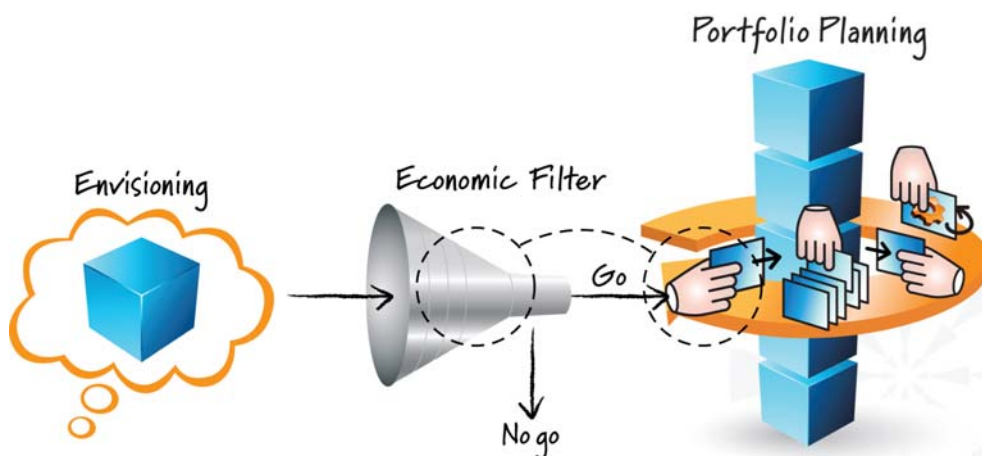
✱ T-shirt size estimating

Size	Rough Cost Range
Extra Small (XS)	\$10k to \$25k
Small (S)	\$25k to \$50k
Medium (M)	\$50k to \$125k
Large (L)	\$125k to \$350k
Extra Large (XL)	>\$350k

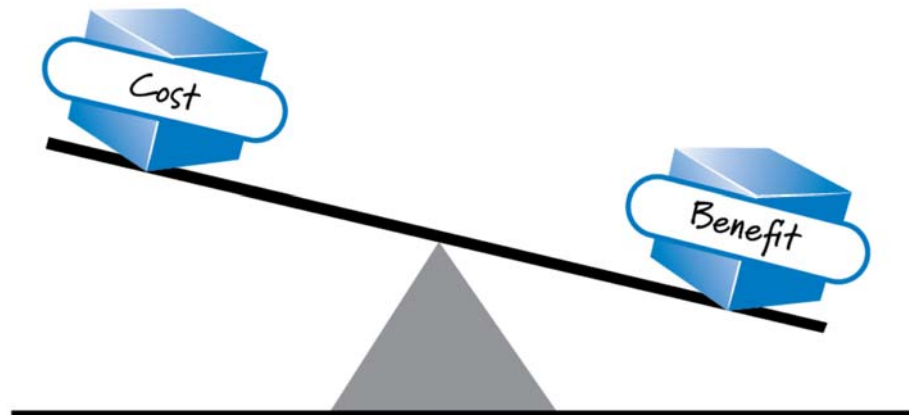
(an example)



✱ Applying the economic filter



Simple economic filter—benefit should far exceed cost



Emergent opportunities

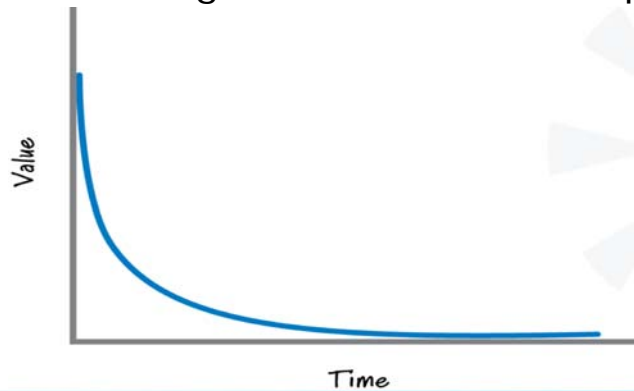
How quickly are you able to exploit an emergent opportunity?

How disruptive are such opportunities to your portfolio-management process?



☀ Dealing with emergent events

- ☀ Can't be ignored for any length of time
- ☀ Need to act soon or immediately
- ☀ Can and often should interrupt other forms of work that are taking place
- ☀ The value of doing the work declines rapidly



☀ Project sizes

How does project size affect overall portfolio performance?

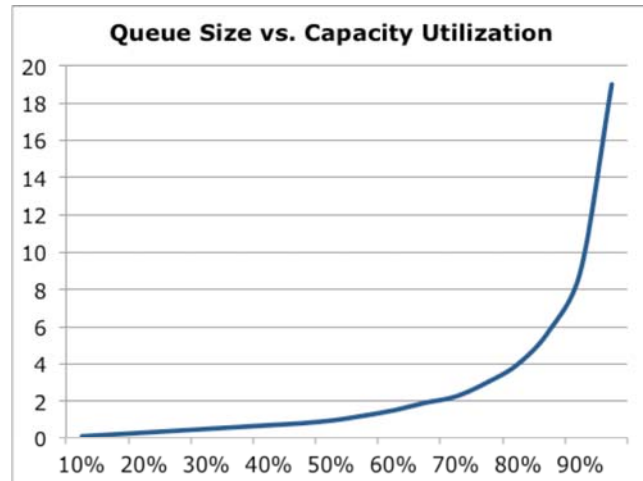
What happens if you get behind the large farm vehicle on a single lane country road?

How do the lifecycle profits of a project compare between one large release and multiple, smaller releases?



Focus on idle work not idle workers

Watch the Baton Not the Runners†

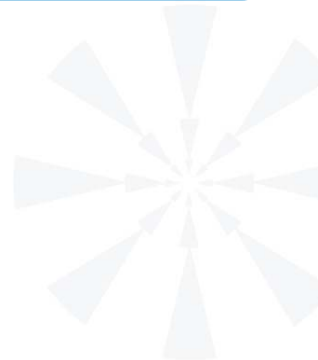


† Source: Larman & Vodde



Work-in-Process (WIP) Limit

Why should a good restaurateur not seat paying customers at an available table if 30% of the servers called in sick that evening?



✦ What is a WIP Limit?

A work-in-process (WIP) limit would state how many projects we are willing to have active at the same time

Goal is to match WIP with available capacity



✦ Summary – Manage opportunities and work with a big head not a small head

Question	ראש גדול	ראש קטן
What	Do the "right" things	Do everything
When (prioritize)	Based on money and cost of delay	Nosiest person first
Who	Work distributed to resources based on skills and availability	Rabbi has fingers in everything
How much (at same time)	Know the reasonable capacity to do work, and don't exceed it	Do everything at the same time
Manage	Manage for fast and flexible flow	Manage like a משוגע



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Essential Scrum: A Practical Guide to the Most Popular Agile Process	www.essentialscrum.com

