salesforce
Innovation Center

More Value Sooner

Business Agility through an Organizational Maturity Lens

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Bios

Erik Sowa

Erik helps organizations and leaders deliver more value, sooner, with higher quality.

Erik is currently coaching at Salesforce with the organization responsible for the Salesforce mobile application and mobile platform. Prior to taking the coaching role, he led engineering teams for over twenty years. His first career was in computational physics and materials science.

Erik holds the Accredited Kanban Consultant (AKC) credential from Kanban University.

Noel Vega

Noel has a passion for helping teams deliver more value with less effort and higher accuracy.

Noel is currently Director of Operations and Strategy for Salesforce's Technology COO organization, driving improvements to reduce overhead and give our teams more time to focus on their day jobs. During his 17 years in the tech industry prior to taking this assignment, Noel held roles including software engineer, technical program manager, and agile coach.

Noel holds a BS in Computer Science from Columbia University and an MBA in Technology Management from the University of Southern Indiana.

Agenda

- We use the Salesforce Agile Team's executive briefing deck to frame our talk
  - The Salesforce Innovation Center is where we speak to customers who have questions about how Salesforce works
  - This deck is how we engage with customers who are curious about how teams and clouds build product at Salesforce
  - We always customize it to the needs of our specific audience
- We will look back at our origin story using Kanban's Organizational Maturity Model mindset to understand the past
- Erik will describe using Kanban change-management principles in the present
- Noel will outline applications of Kanban outside of product development work

Product Delivery the Salesforce Way

In the Early Days of Salesforce
Release frequency was simple

No hands off

Collaboration

Communi-cation

Delivered Consistently

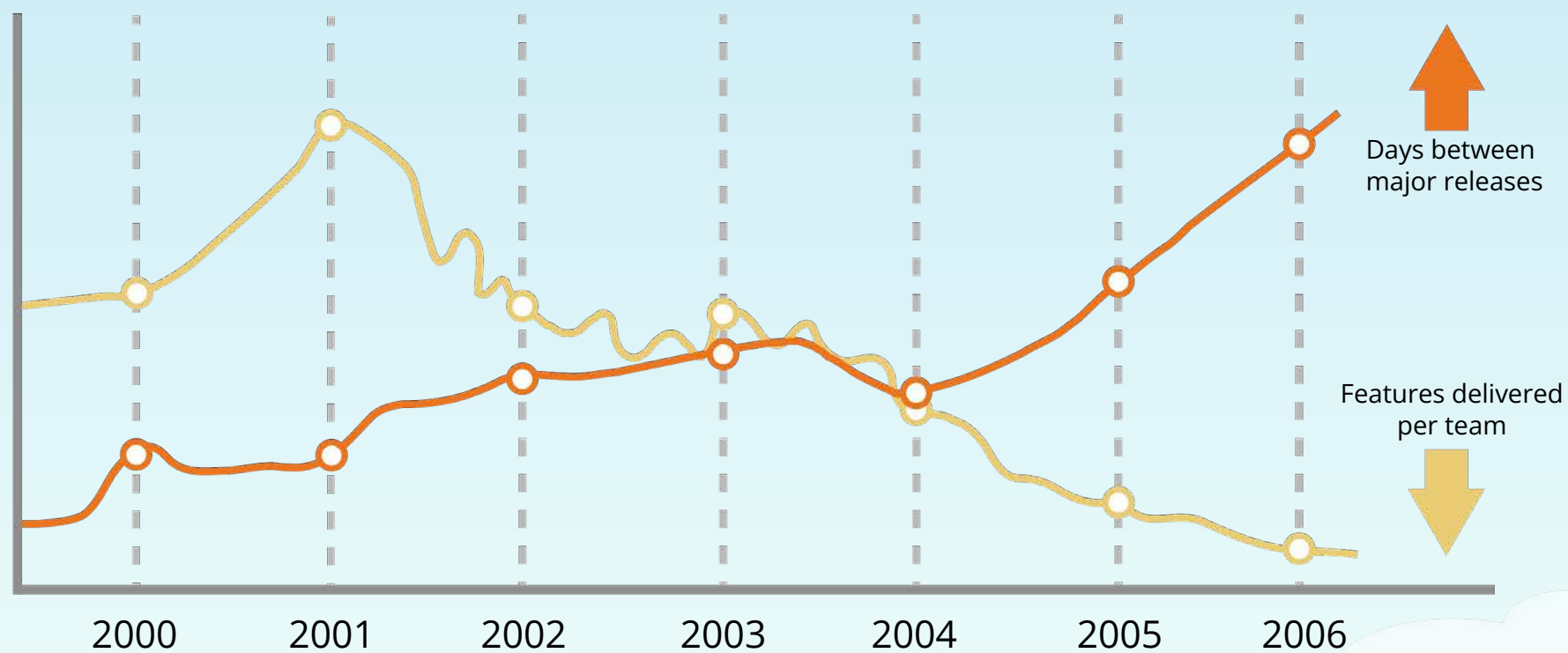# Salesforce Grew Quickly

And, with rapid growth came...

Strained Communication

Unclear Priorities

Dependencies

Unpredictable Releases

Time Between Major Releases Increased

Days between major releases

Features delivered per team

2000   2001   2002   2003   2004   2005   2006

Punctuation Point
Possibly an extinction-level event

Meteor images are in the public domain (NASA).

Salesforce.com: The Development Dilemma

A Punctuation Point (2006)

"The existing development processes had been slipping for some time. The pace of releases of new software features—a key measure of value for customers—had slowed from four times per year to once per year, and the latest release was taking even longer than that. Morale was suffering across the organization, and a highly respected senior developer had recently quit after delivering a scathing offsite presentation that criticized nearly everything about the current situation. Furthermore, an infrastructure failure had caused service outages that prevented customers from accessing their customer information during the critical pre-holiday period in 2005. Another outage in early 2006 further eroded users' trust in the reliability of Salesforce.com's software service capabilities."

Agile Was the Solution
Major releases are like clockwork

salesforce

Days between
major releases

Features delivered
per team

2007 ⟶ **Today**
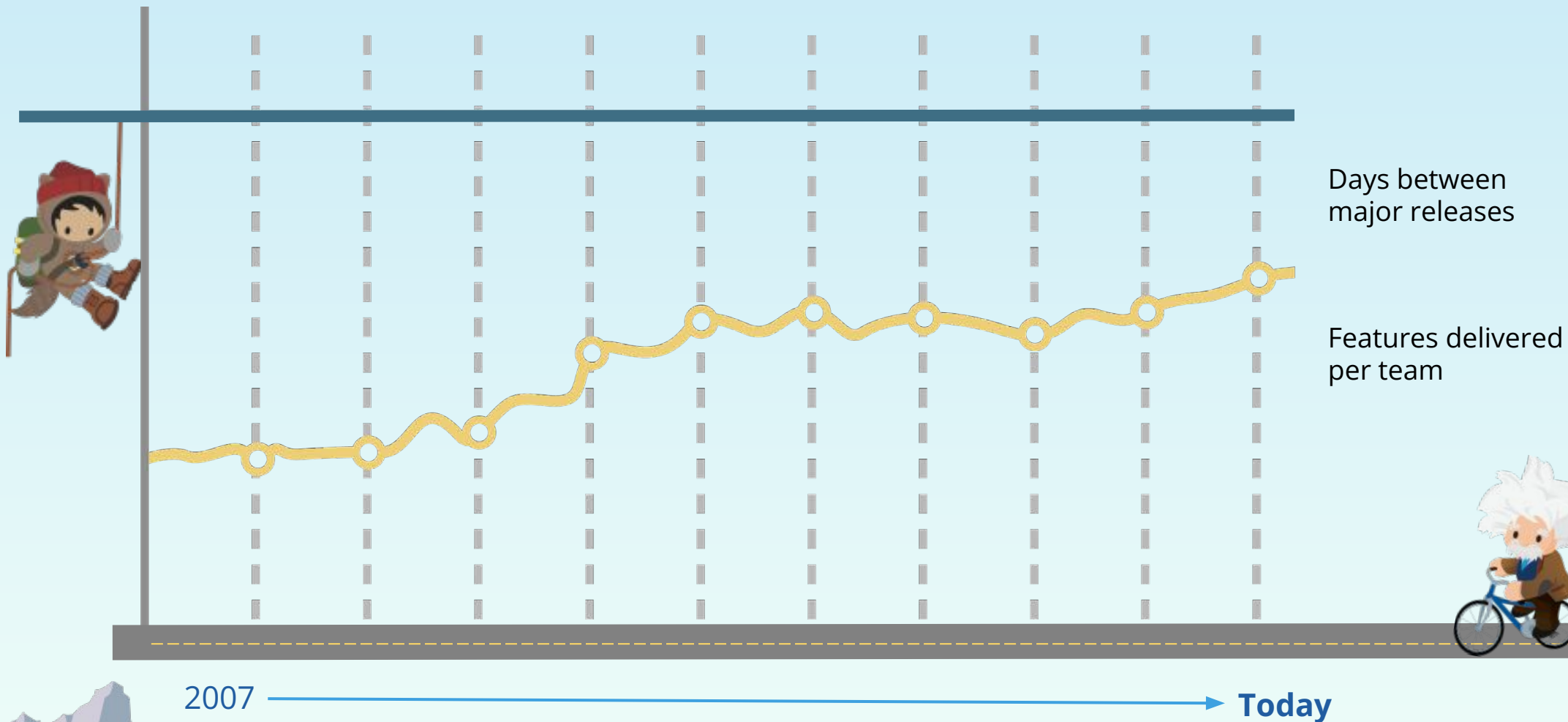
Innovative: 3 Major Releases Per Year
Seamless, automatic updates
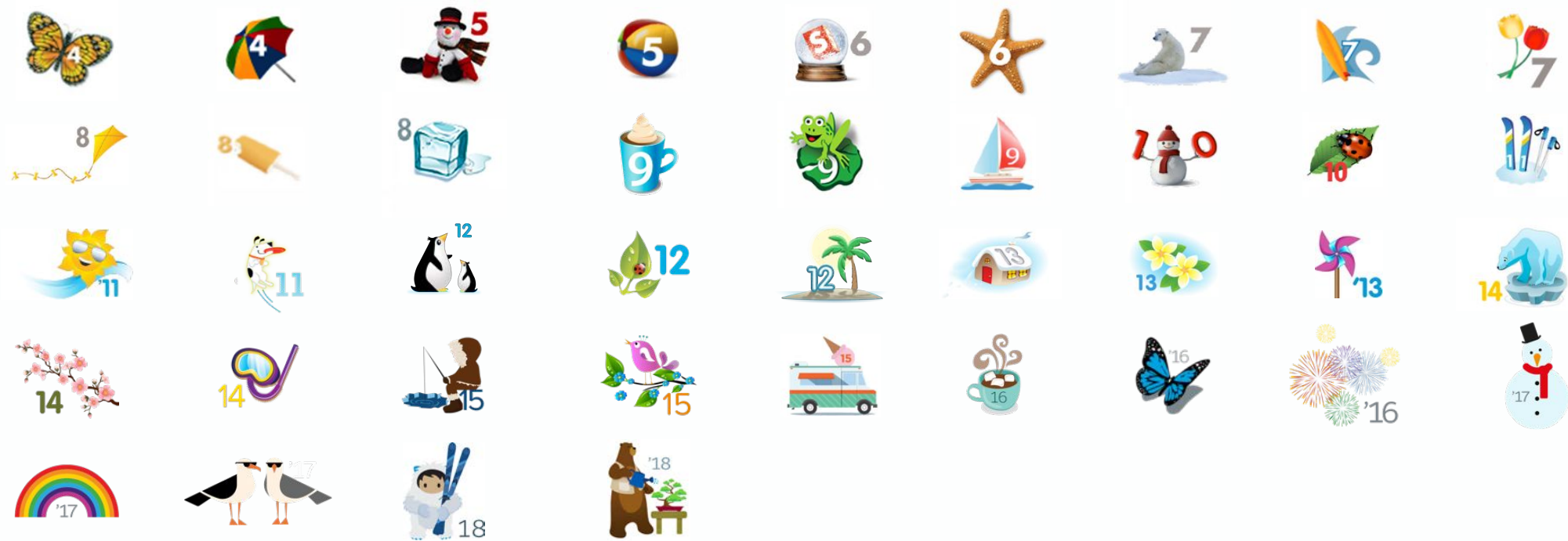
55
Major releases delivered

Automatic Updates
Customization & integration

Features sourced
by customer community

Manage Flow
A Kanban ML2 practice

Delays cause customer dissatisfaction

Valuing flow means valuing removing delay

What is blocking flow in your world?

Flow as a product marketing message

slack   salesforce

When work flows, customer success grows

Exercise

When the work flows,
_____ grows

Work flows, business grows

We survived and prospered

The price was constant management attention

This affected our ability to scale as we grew

To do Agile ≠ To Be Agile

PRINCIPLES

VALUES

PRACTICES

PSYCHO LOGICAL SAFETY
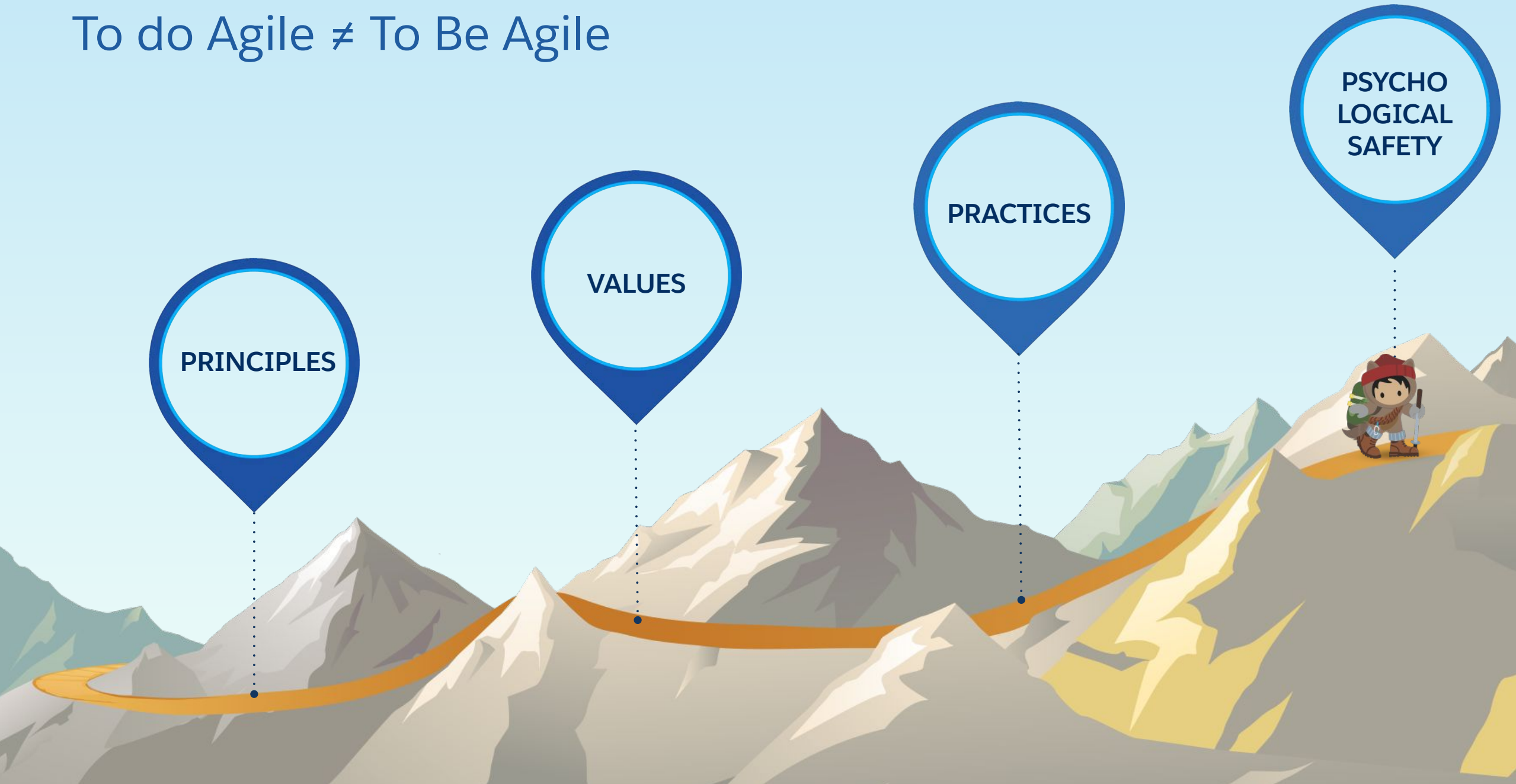
Guided by Our
Core Values

CORE VALUES

TRUST

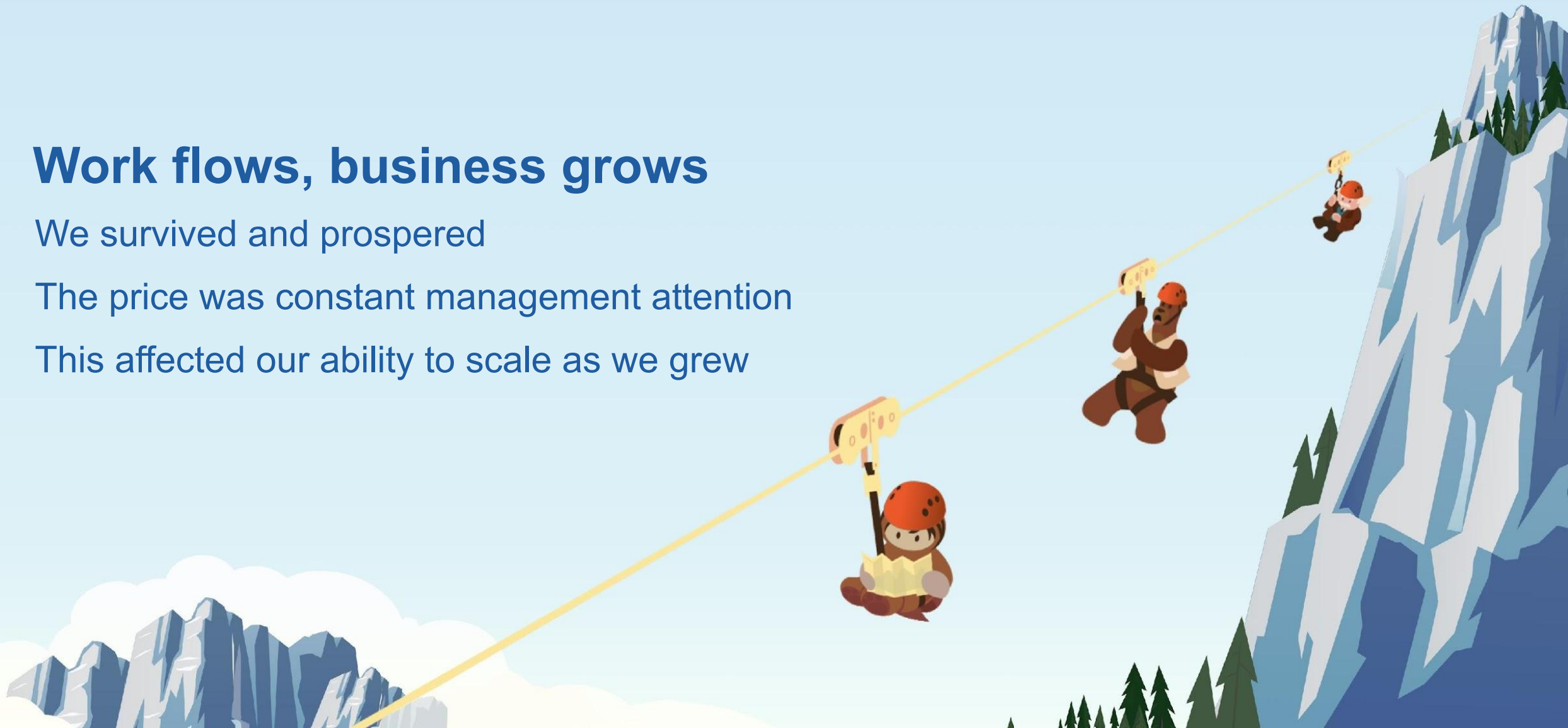**CUSTOMER SUCCESS**

INNOVATION

EQUALITY

SUSTAINABILITY

salesforce

Practices follow Principles follow Values

Core Values

🔗 **TRUST**
Complete transparency

🙂 **CUSTOMER SUCCESS**
Focused on our customers' success

💡 **INNOVATION**
Technology for success

EQUALITY
Education, pay, diversity, inclusion, and environment

7 Key Principles

JUST-IN-TIME DECISIONS

OPTIMIZE THE WHOLE

BUILD QUALITY IN

CREATE KNOWLEDGE

RESPECT PEOPLE

ELIMINATE WASTE

DELIVER FAST

Agile Practices

GROOMING

PLANNING

RETROSPECTIVES

RELEASE PLANNING

DEFINITION OF DONE / READY

USER STORIES

TEST-DRIVEN DEVELOPMENT

CI/CD

AUTOMATED ACCEPTANCE TESTING

Reflection

Looking back through a Kanban lens

Principles of the Kanban method

Start with what you do now

Agree to pursue incremental, evolutionary change

Respect the current process, roles, responsibilities, and titles

Encourage acts of leadership at all levels in your organization
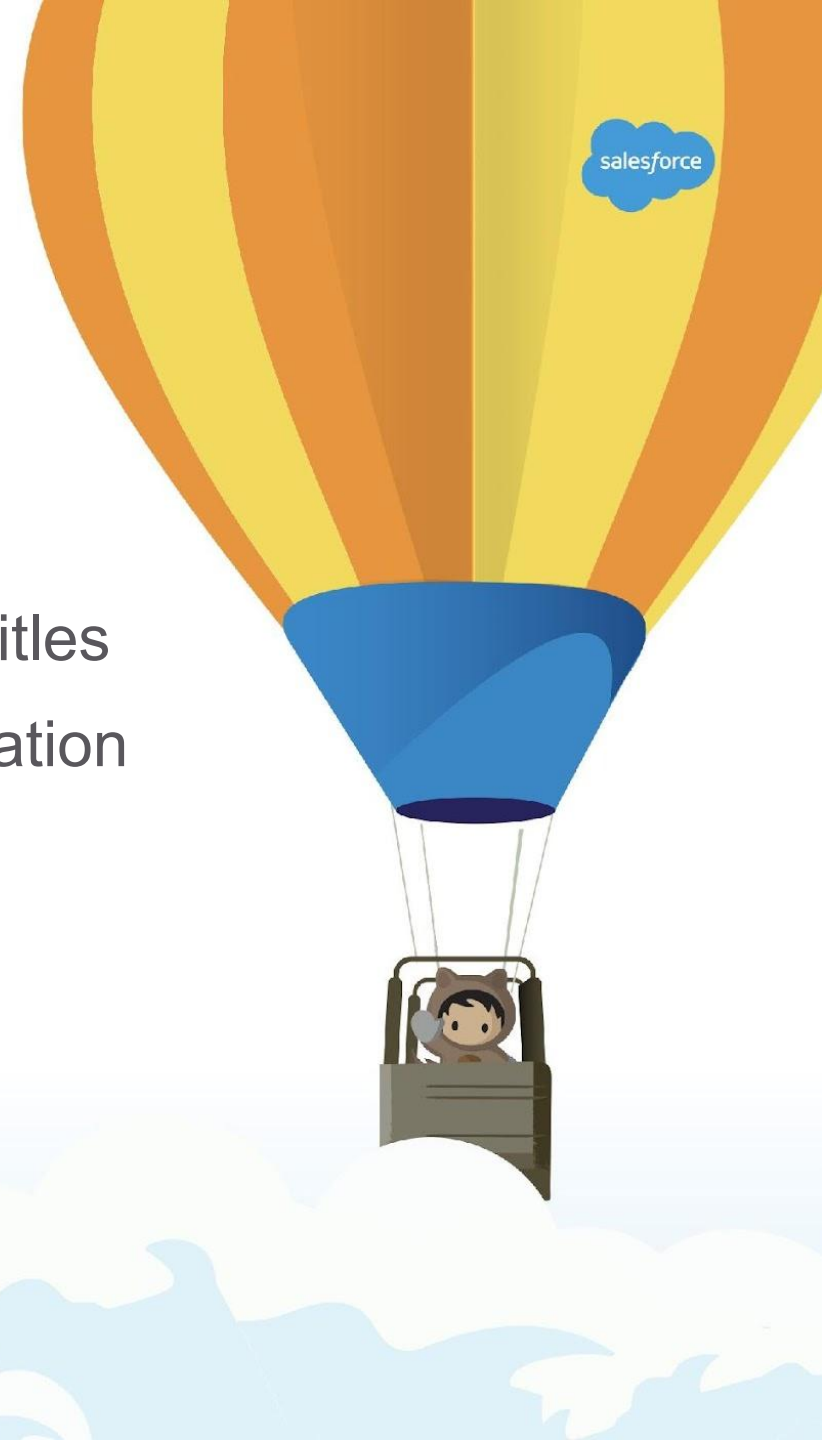
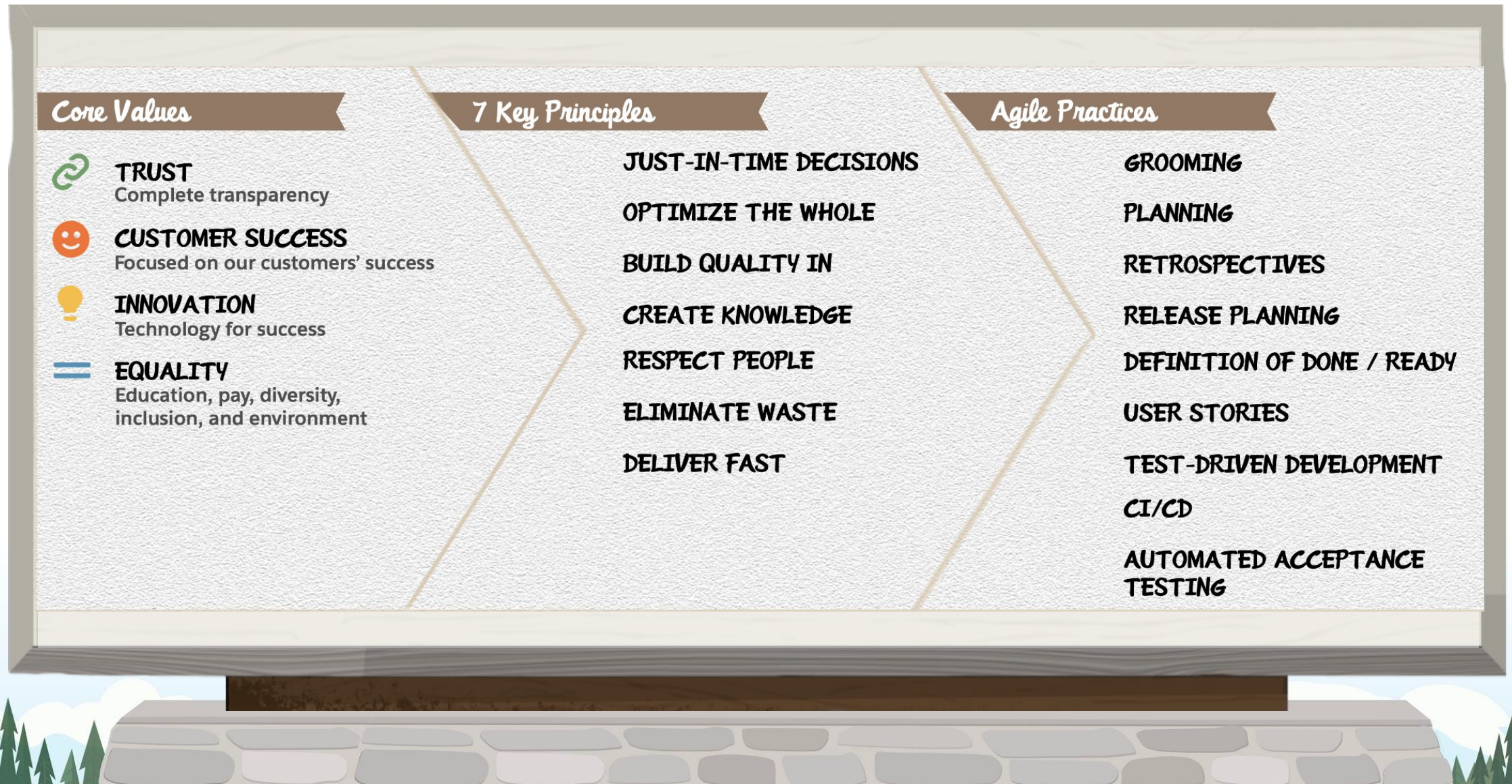# Kanban Maturity Model
Cultural Mantra

Practices follow Principles follow Values

Core Values	7 Key Principles	Agile Practices
TRUST Complete transparency	JUST-IN-TIME DECISIONS	GROOMING
CUSTOMER SUCCESS Focused on our customers' success	OPTIMIZE THE WHOLE	PLANNING
INNOVATION Technology for success	BUILD QUALITY IN	RETROSPECTIVES
EQUALITY Education, pay, diversity, inclusion, and environment	CREATE KNOWLEDGE	RELEASE PLANNING
	RESPECT PEOPLE	DEFINITION OF DONE / READY
	ELIMINATE WASTE	USER STORIES
	DELIVER FAST	TEST-DRIVEN DEVELOPMENT
		CI/CD
		AUTOMATED ACCEPTANCE TESTING

Kanban Maturity Model
Managed Evolution

Things people value and refer to as principles or norms (written or unwritten) that justify behaviors and practices

"how we live"

- Routine activities
- Observable patterns of interactions
- Settled, regular Kanban practices
- Habits

"how we do things"

- Meeting customer expectations
- Achieving business goals
- Resilience and reinvention

"what we achieve and the capabilities we acquire"
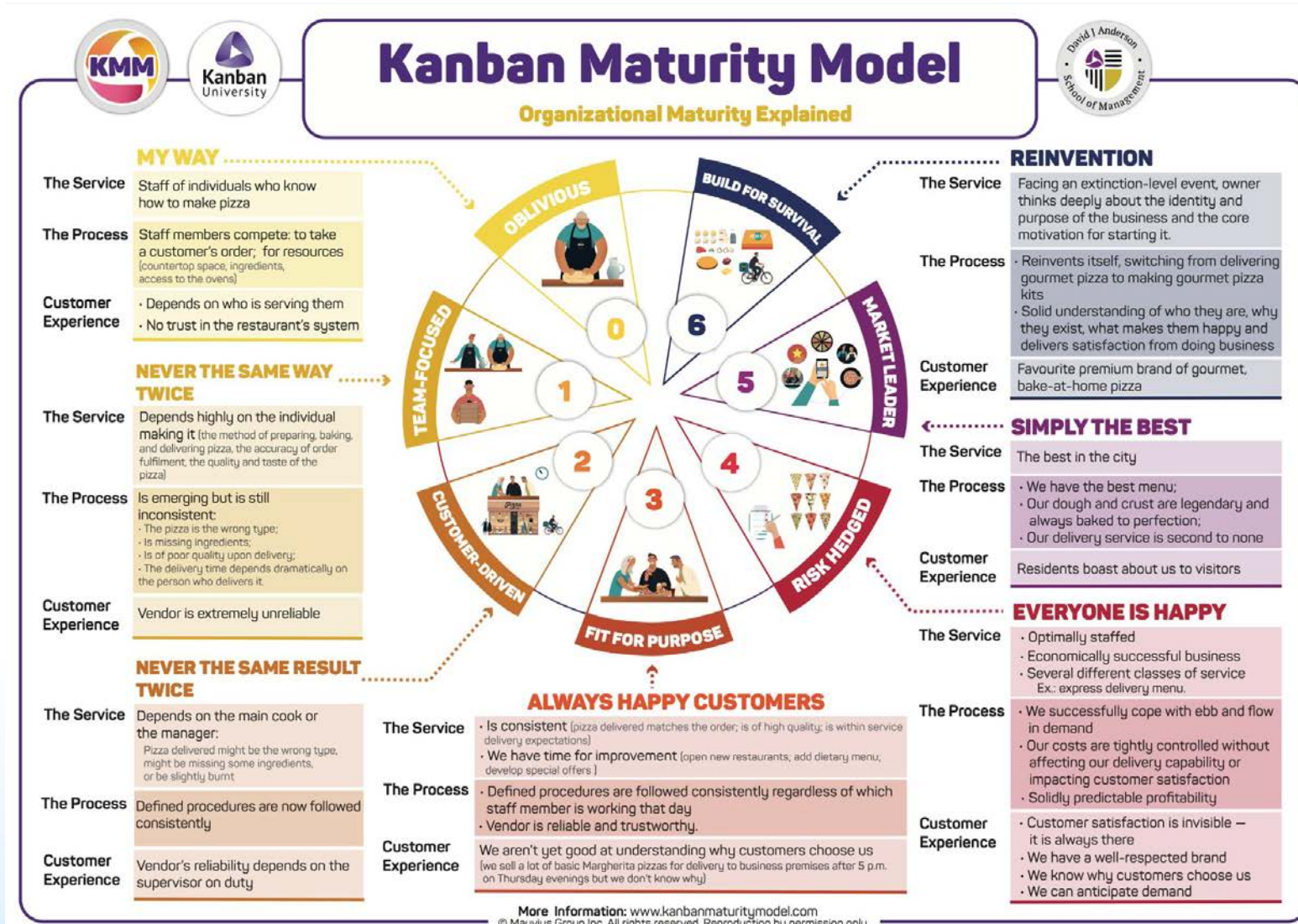
Organizational Maturity Model

Organizational Maturity Model

Graphic from Kanban Maturity Model © Mauvius Group. Used with permission.
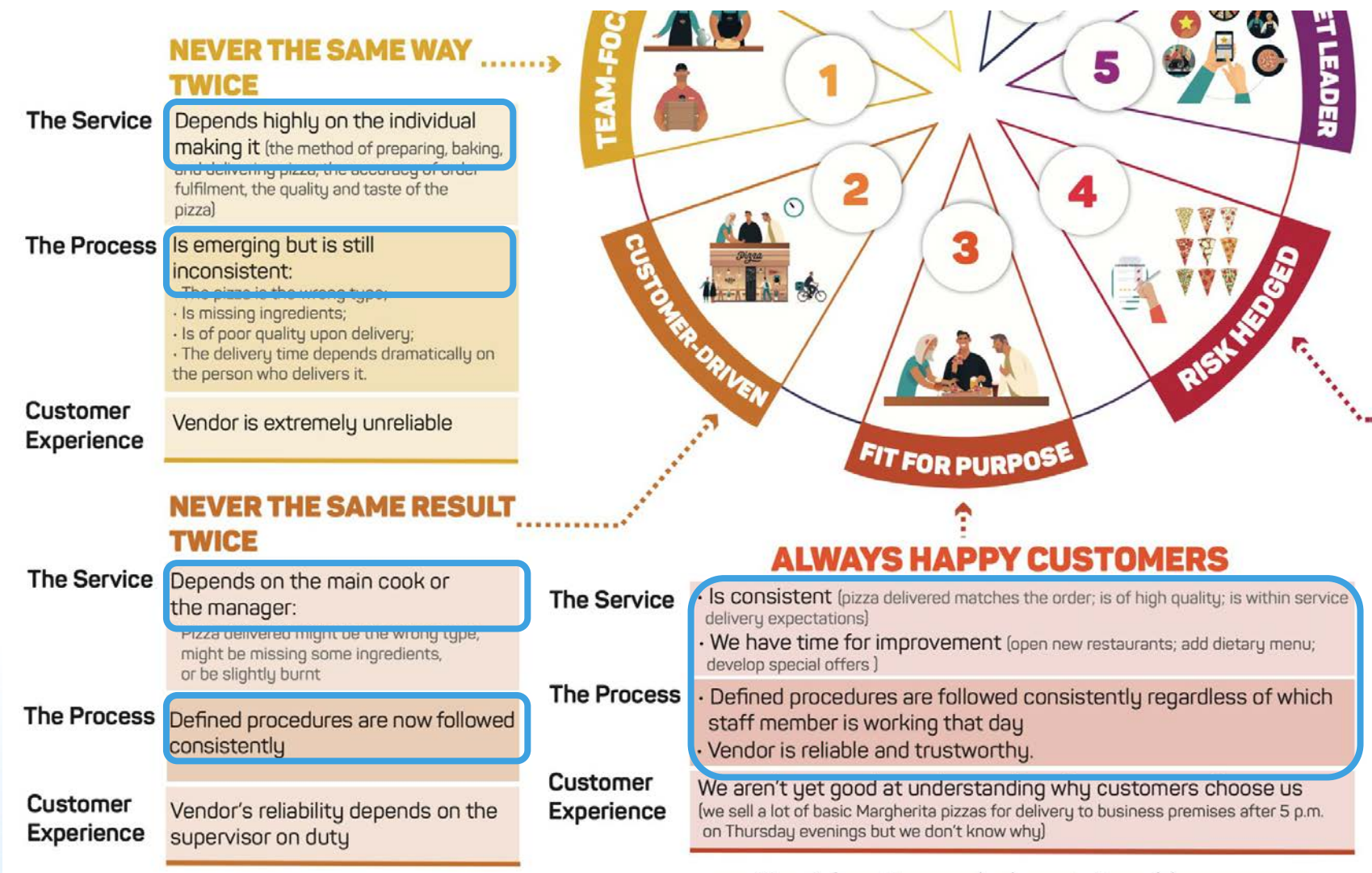
Organization Maturity Transition

Level 1 -> Level 2

Return

Back to our Agile@Salesforce story
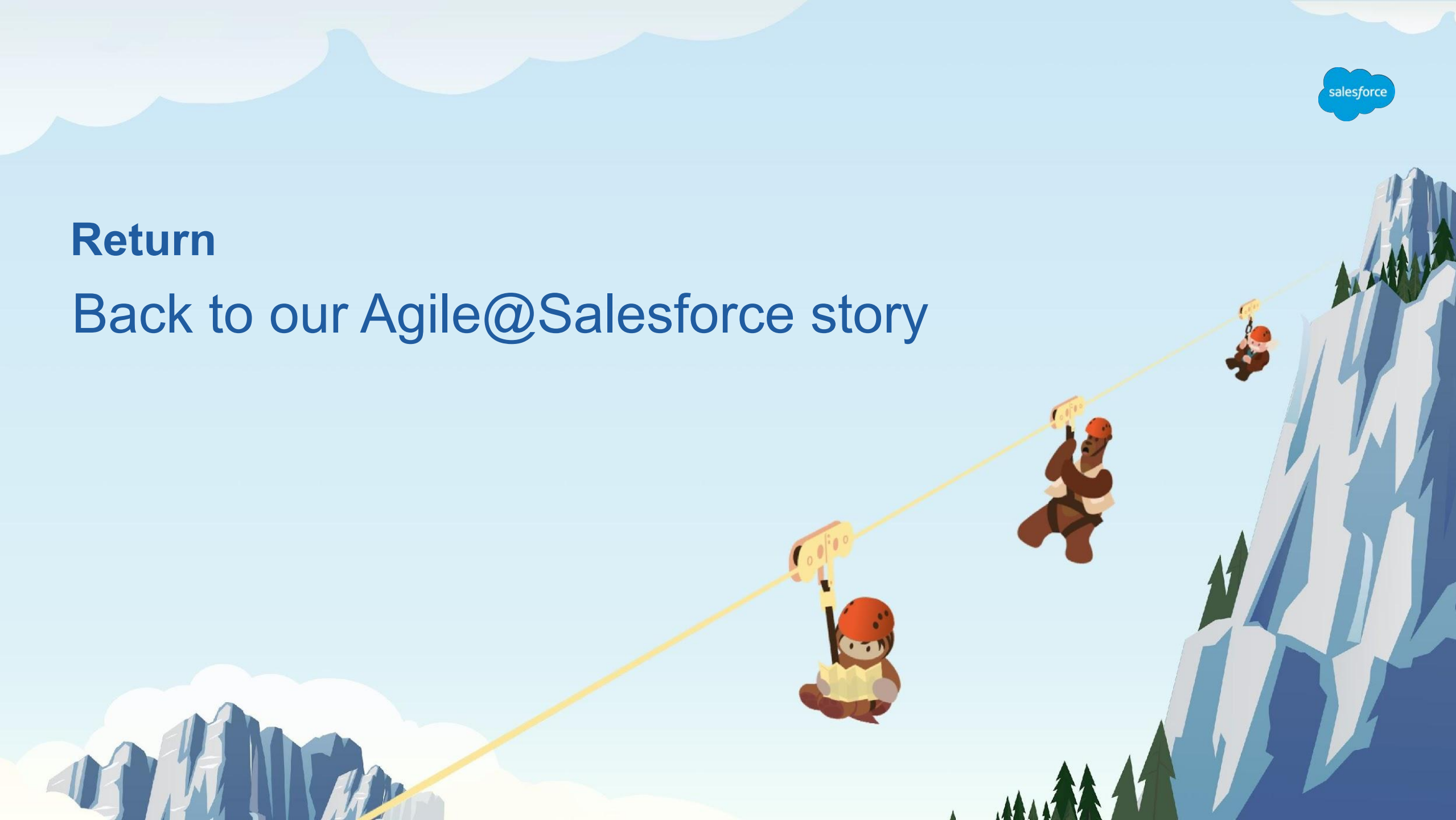
Where Are We Now?

1000+

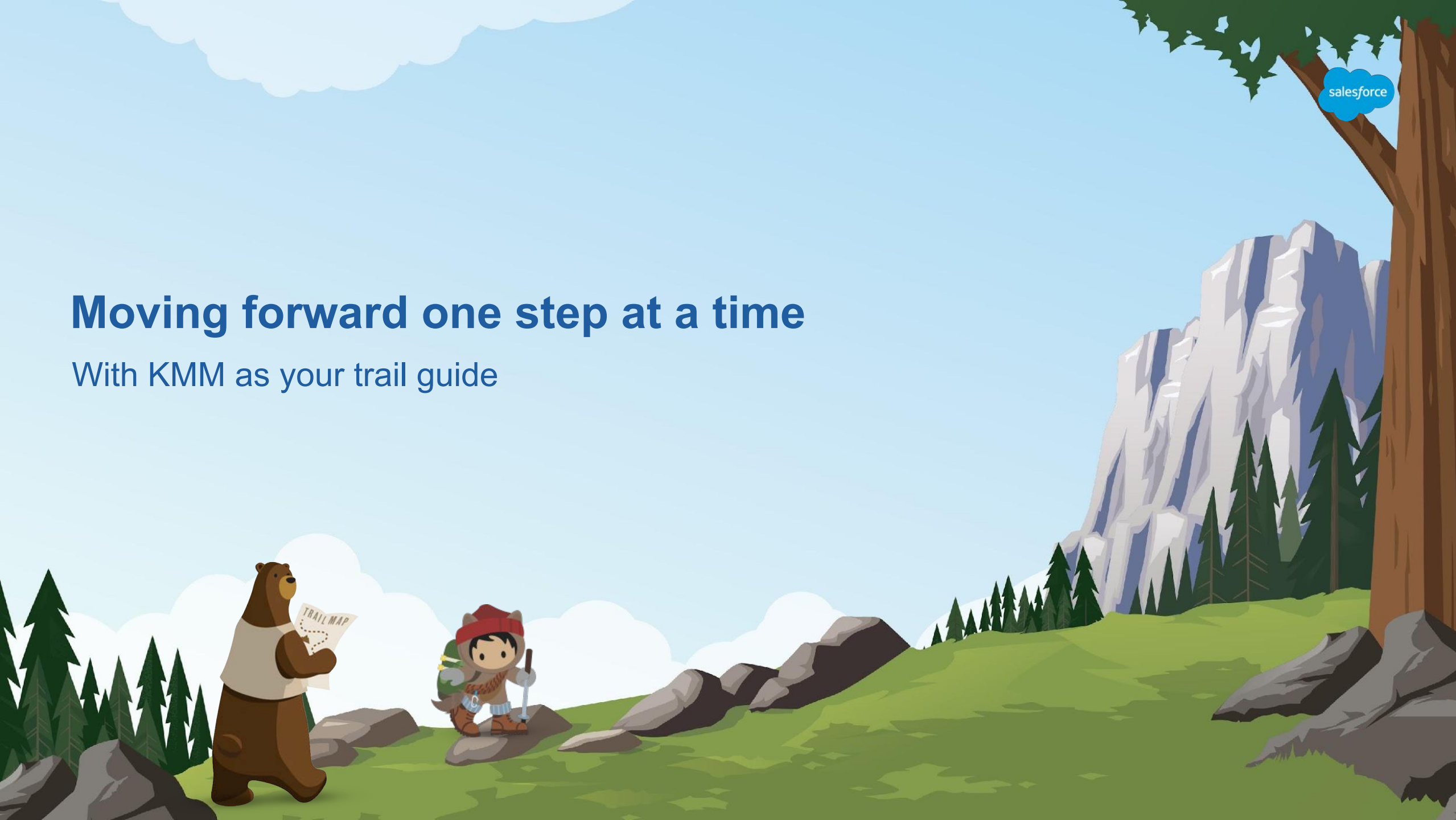## agile teams building products and services

Application

Moving forward with a Kanban mindset

Moving forward one step at a time

With KMM as your trail guide

Why do change initiatives fail?

- Brief roleplay
- Identity threat -> Emotional resistance
- We've all seen this pattern many times
- There is a better way to foster lasting change and managers play a crucial role

Maturity models done well are maps for managed evolution
Leadership is essential

DEFINITION OF CULTURE

Culture $= \sum ($ Values $\times$ Behaviour $)$

Define Identity

Decisions + Actions (of the leaders)

Graphic from Kanban Maturity Model © Mauvius Group. Used with permission.
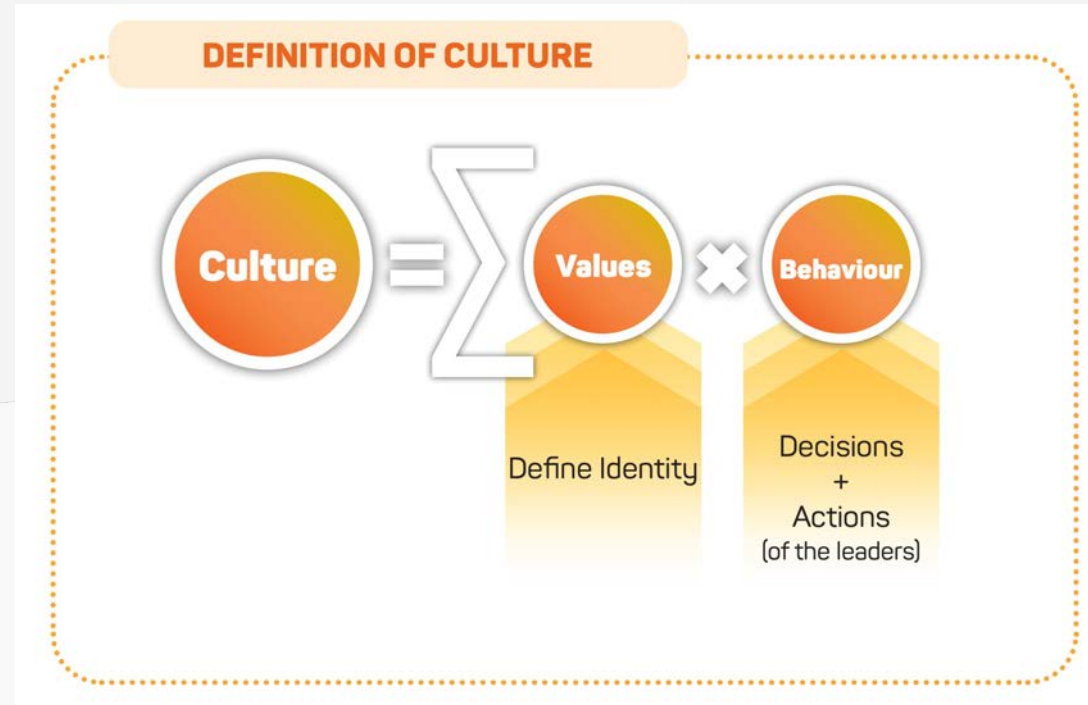
Formula for evolutionary change
Stressor + Reflection Mechanism + Leadership
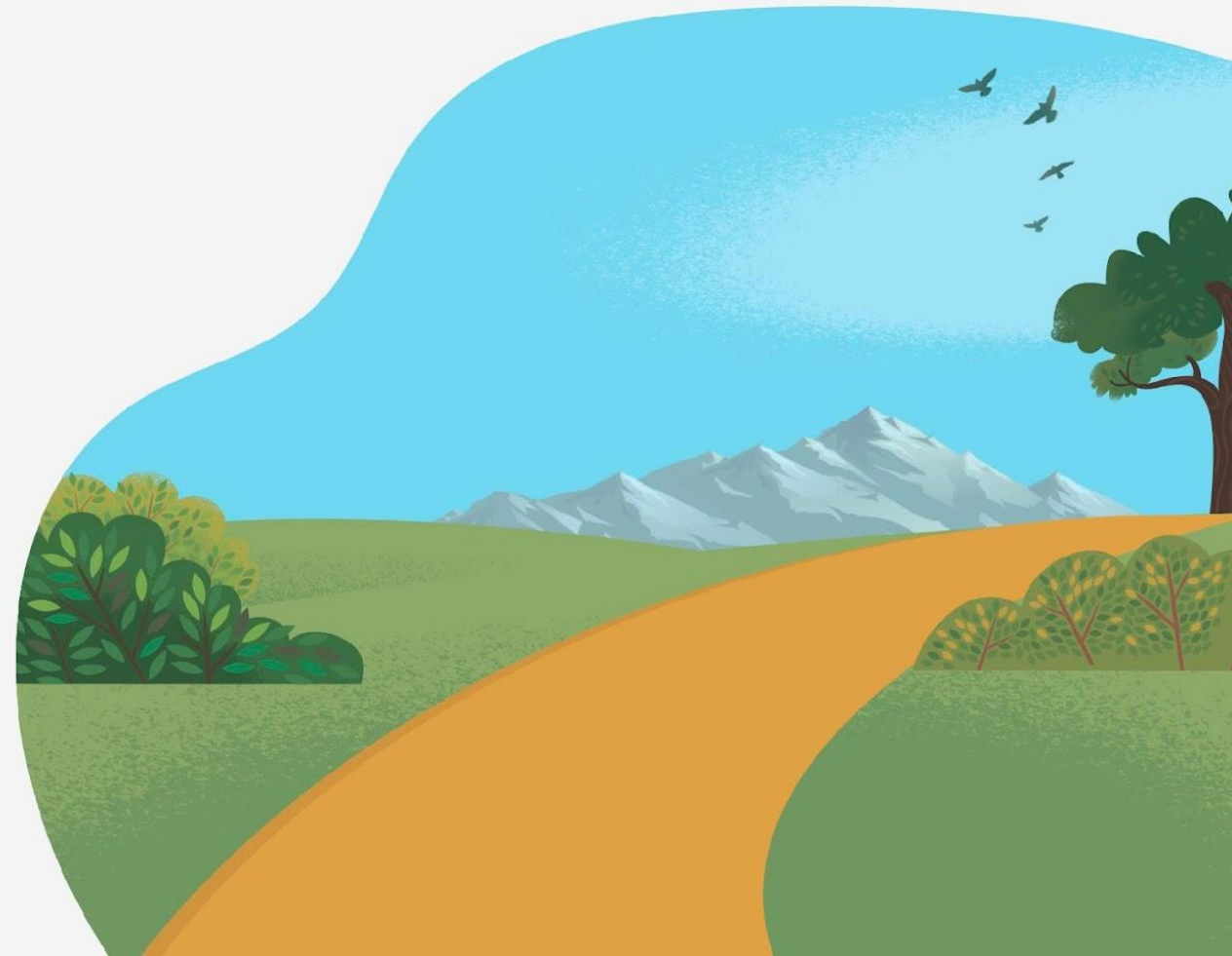
Look how far we've come together!

From where we started…

- December 2016 retro: Home screen redesign cancelled
  - All-or-nothing bucket of technical and product risk
  - Some of the work wasn't ready so all of the work was held back
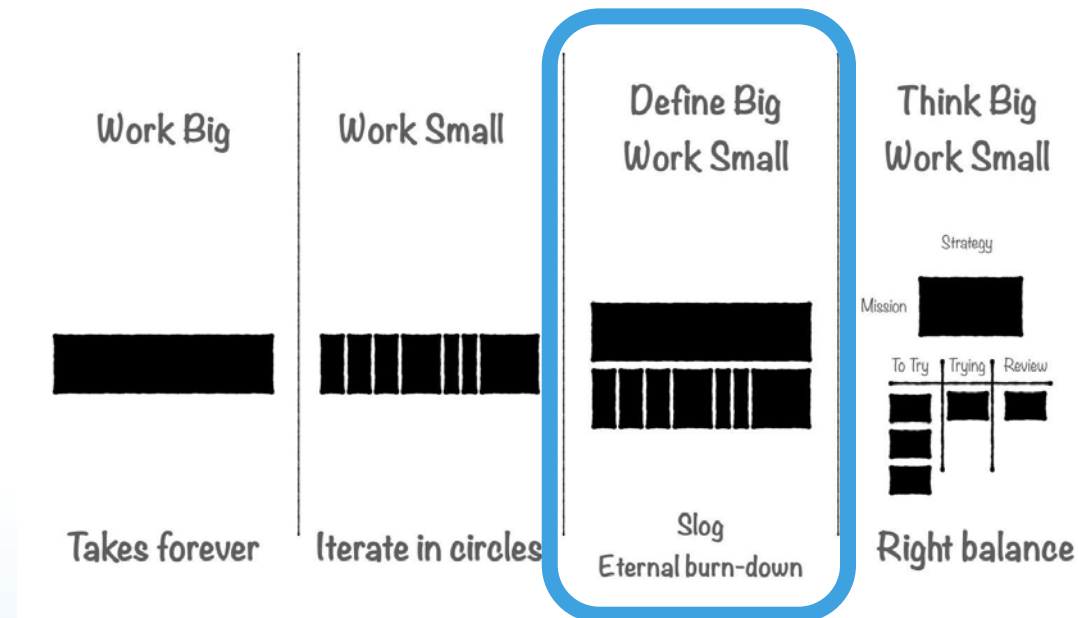
Work Big	Work Small	Define Big Work Small	Think Big Work Small
Takes forever	Iterate in circles	Slog Eternal burn-down	Right balance

Strategy

Mission

To Try | Trying | Review

Rapid Release Trains for the Salesforce Mobile App

Shipping every two weeks changed our engineering culture for the better

This story started in 2017 when senior leaders challenged us with a Facebook engineering blog on Rapid Release at Massive Scale.

We set ourselves a goal to make our codeline **shippable at any time**
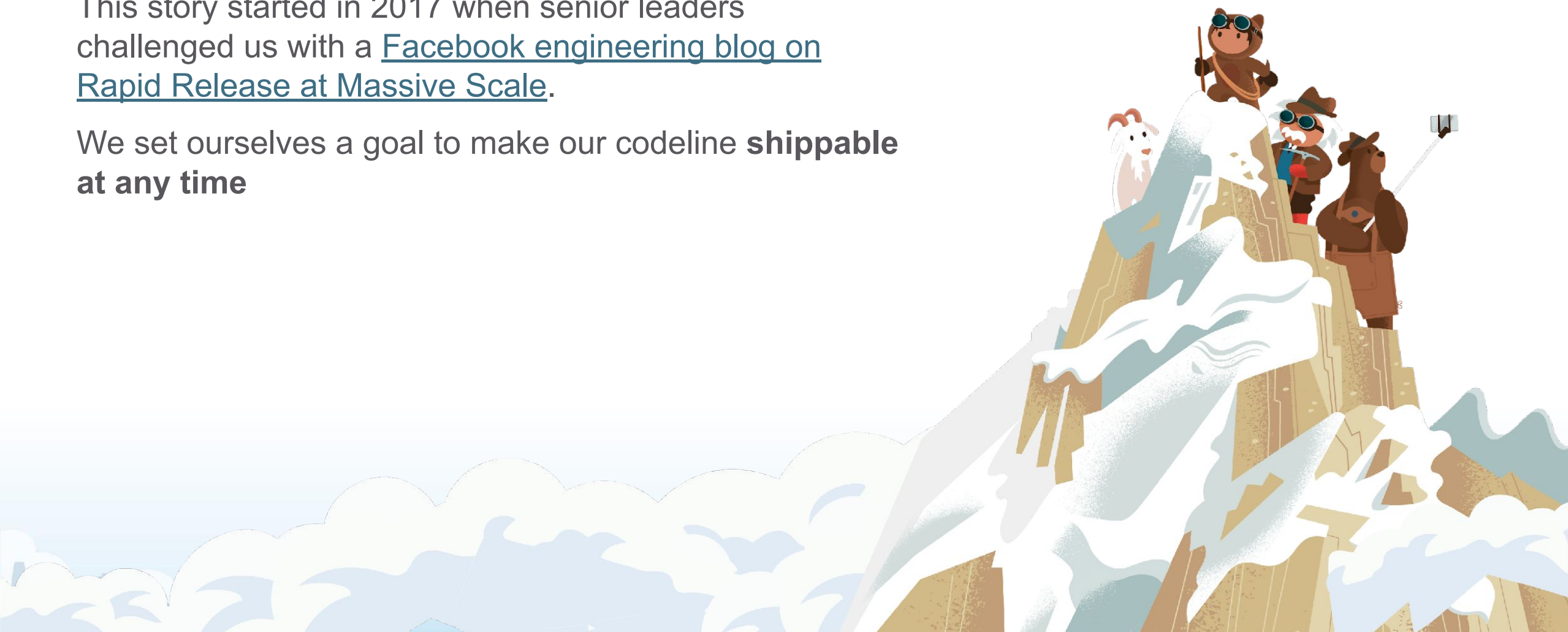
Chapter 3 - Rapid Release at Massive Scale Proposal (Mobile Cloud)

Imagine the stories we'll be able to tell…

October, 2017

Future Keynote Quotes

Product Manager / Partner	"All of our Salesforce mobile apps supported Apple's new device and all of its new mission-critical capabilities in production on the same day Apple launched it!"
Customer	"Salesforce mobile engineers helped diagnose and fix an issue in production that would have blocked our mission-critical internal app launch, and they did it before the phone call in which we reported the issue was over."
Developers	"I pushed a change to a customer's production org that resolved a critical interaction between their code and the platform. The diagnosis and fix took less than half an hour – we finished before the customer phone call reporting the problem was over. They were extremely happy and so am I."

Vision
What does it look like when we make those stories come true?

The mobile cloud can exploit emerging market opportunities and address developing threats with an industry-leading SLA and a developer experience that attracts the best and brightest talent — engineers who delight in focusing on delivering value.

Values

|	
Trust	• Make safety a prerequisite — Protect from mistakes. • We can fix problems before customers encounter them. • The build-test-deploy pipeline and environments must have an SLA equal to or better than production.
Make Customers Awesome	• We deliver value continuously via a combination of people, product, and infrastructure. • We have the best SLA in the business for making changes to production in a volatile market. • The development team is responsible for quality, operability, security, etc, not just coding the features and fixes. Code is not "Done" nor even "Fixed" unless/until all these are handled. • Architecture that evolves over time while protecting its most important characteristics.
Make Developers Awesome	• Our engineers enjoy a low-friction, high-productivity working experience • They can experiment and learn rapidly and focus on delivering world-class services • Engineers decide when to roll code. Product managers decide when to release features. Those decisions are independent.

Rapid Release Trains for the Salesforce Mobile App

Shipping every two weeks changed our engineering culture for the better

This story started in 2017 when senior leaders challenged us with a Facebook engineering blog on Rapid Release at Massive Scale.

We set ourselves a goal to make our codeline **shippable at any time**

We identified and closed gaps in our engineering discipline and practices to reach that goal

Collaborating to reach this goal delivers improvements in quality, availability, **and** innovation!
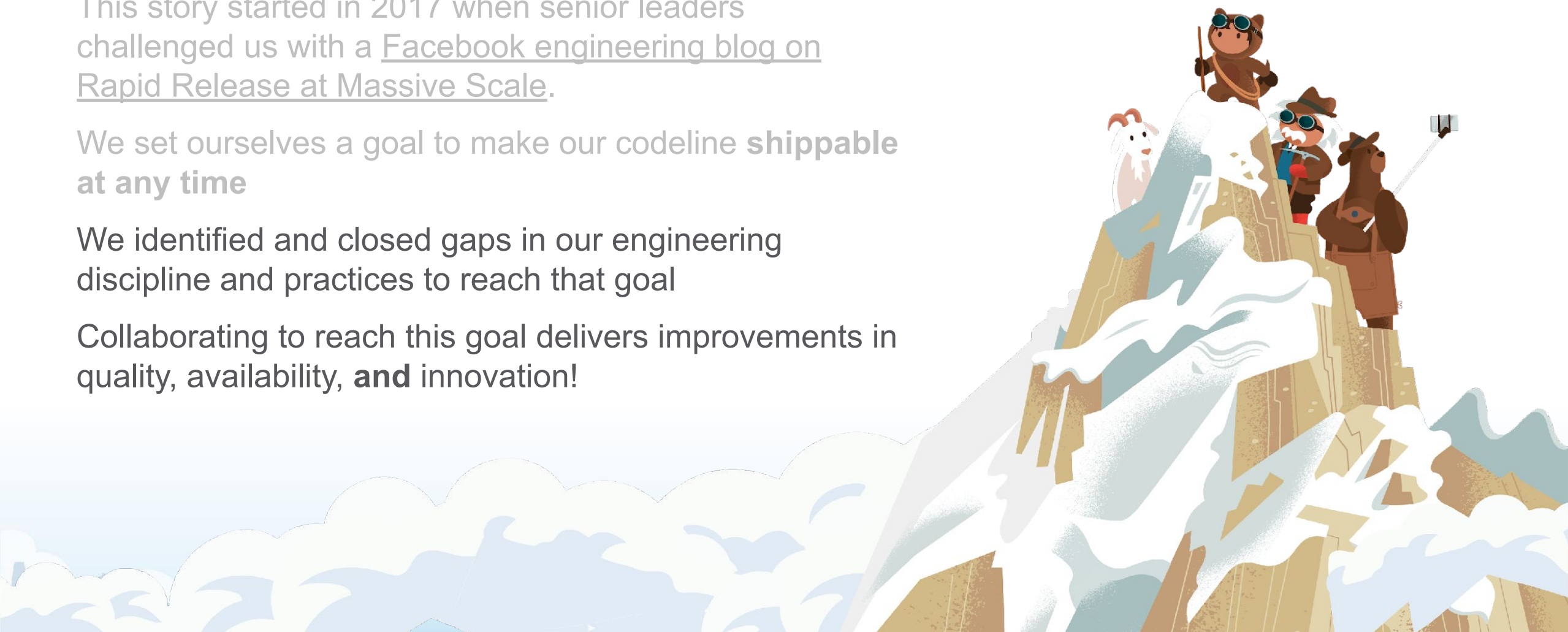
[All Mobile] Thank you
12/17/20 from Mobile Cloud's VP of Engineering

On behalf of the executive management team, we want to take a moment to thank you for all the incredible work you've accomplished this past year […]

- We're delivering **more value** to our customers **sooner** and the **pace and quality** of our releases has never been better.

Engineering Best Practices Team Award (Spring 2020)


Award winners: **Continuous Quality (Mobile Cloud)**

- Customer success with our features
- Delivery of sustained value, release after release
- New features and fixes that don't regress existing features
- Systems that are stable and reliable

Look how far we've come together!

Confidence impact of progressive delivery

- Confidence enables product and engineering to collaborate in new and meaningful ways
- January 2021 Hackathon
    20+ engineering-complete features in ~ 1 day
    20+ options for product to consider
    20+ potential value hypotheses to test
    Better DX -> Better CX
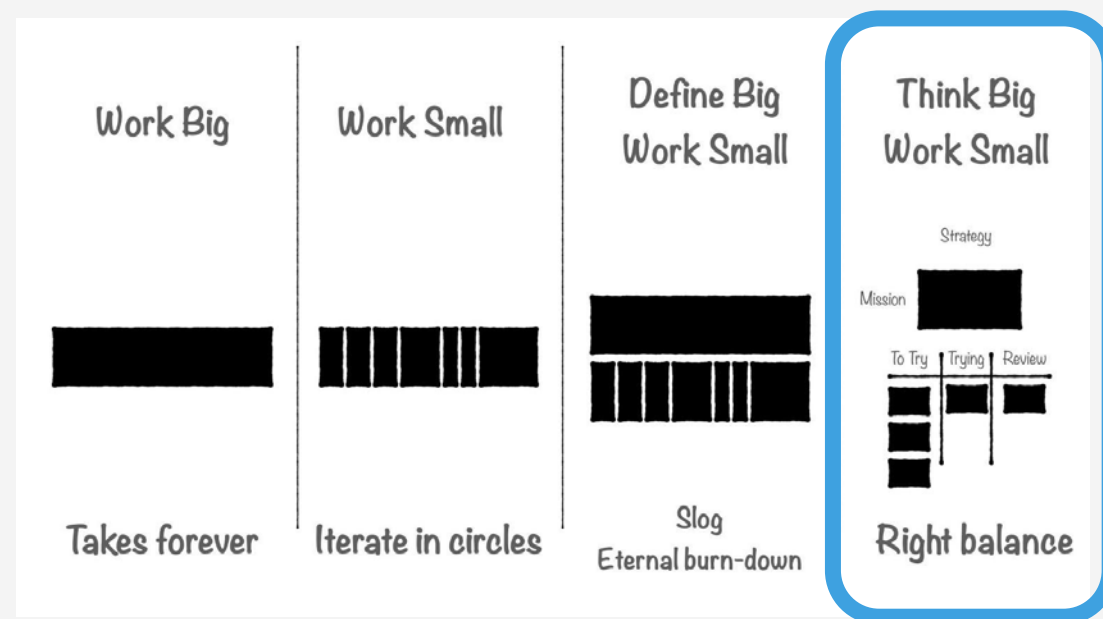
Business Agility @ Mobile Cloud
This is how we do it: Progressive Delivery

"Trusted Agility"

Together, we are learning

to deliver more value,

sooner,

with higher quality

Think Big
Work Small

Strategy

Mission

To Try | Trying | Review

Right balance

Think Big, Work Small graphic © John Cutler. Used with permission.

Strategy and Operations

Kanban thinking applied to business processes

The Challenge: Improve Operations
Perfect for Kanban!

Kanban: Used for Systems Improvement

Business Operations: Set of Systems

This may not be software, but the same principles apply!

Real-World Example: Recruiting

1. Start With What You Do Now

What exists? Who? How?

Research and outline existing processes

- What is the current process?
- What challenges are being reported by leaders?
- What systems, data, reports exist?
- Who are the key resources?

Real-World Example: Recruiting
2. Agree to Incremental, Evolutionary Change

Find and improve our inefficiencies without disrupting the business

Map processes, use statistics to make bottlenecks, inefficiencies visible

1. Improved reporting for better situational awareness
2. Process tweaks to ensure timely accurate requests
3. Find common reqs & leverage shared pipelines
4. Wholesale revamps can wait until later
   a. Don't keep the whole system slow longer than necessary!
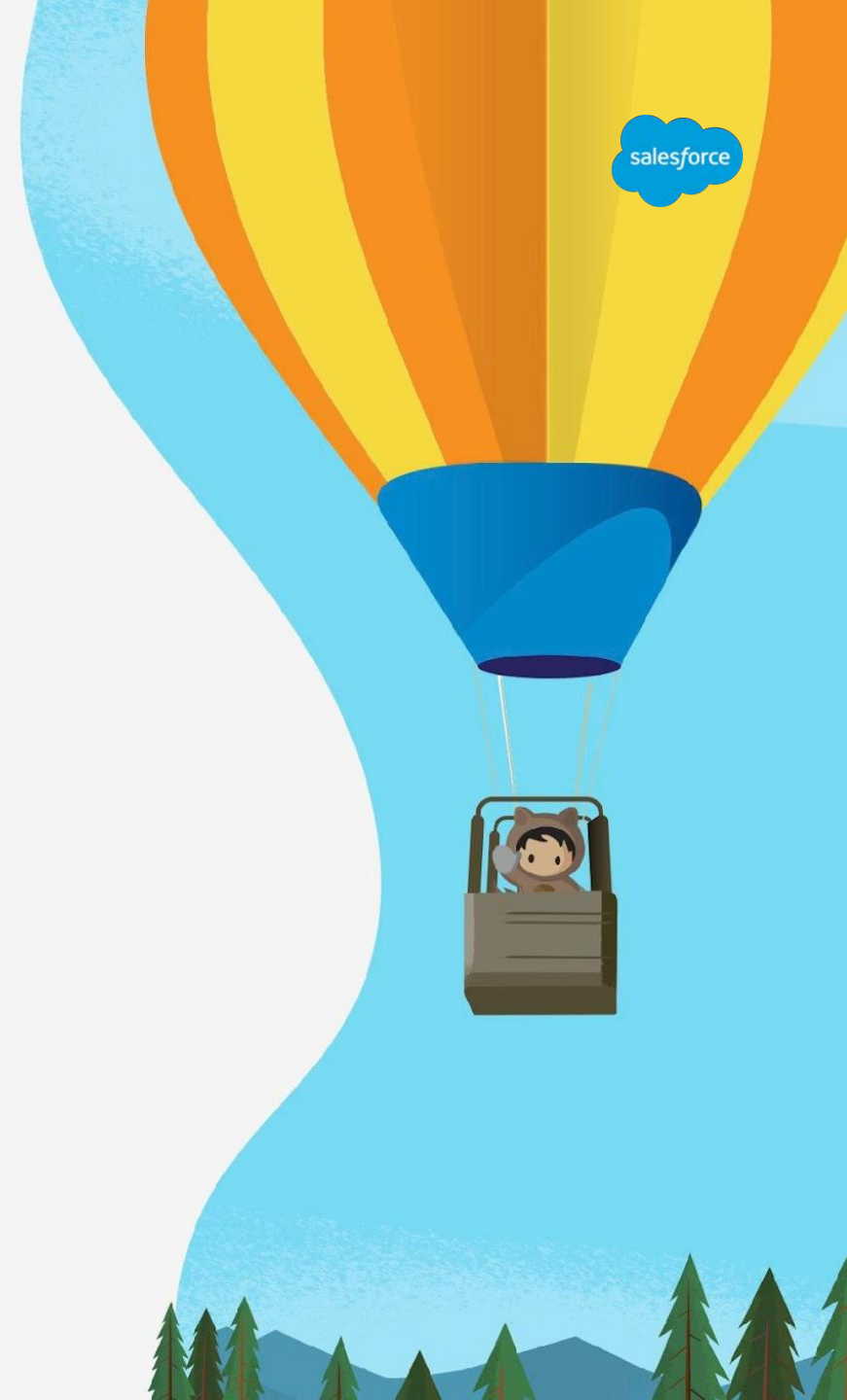
Real-World Example: Recruiting

3. Respect the Current Process

Recruiting: Working hard keeping up with a fast-growing business

Hiring Managers: Working hard with their day jobs too

Neither group has time for blame or "change for change's sake"

If something is working for someone, leave it alone! Some managers have connections to get recruiters - leave them be.

Real-World Example: Recruiting

4. Encourage Acts of Leadership

Establish processes that help teammates shine.
Encourage - don't stifle - innovation!

- Key process changes taken from another org's successes
- Reporting, data collection built upon existing artifacts
- Hiring managers encouraged to reach out to recruiting leaders

Being all about one person does not scale!! It takes a team!!

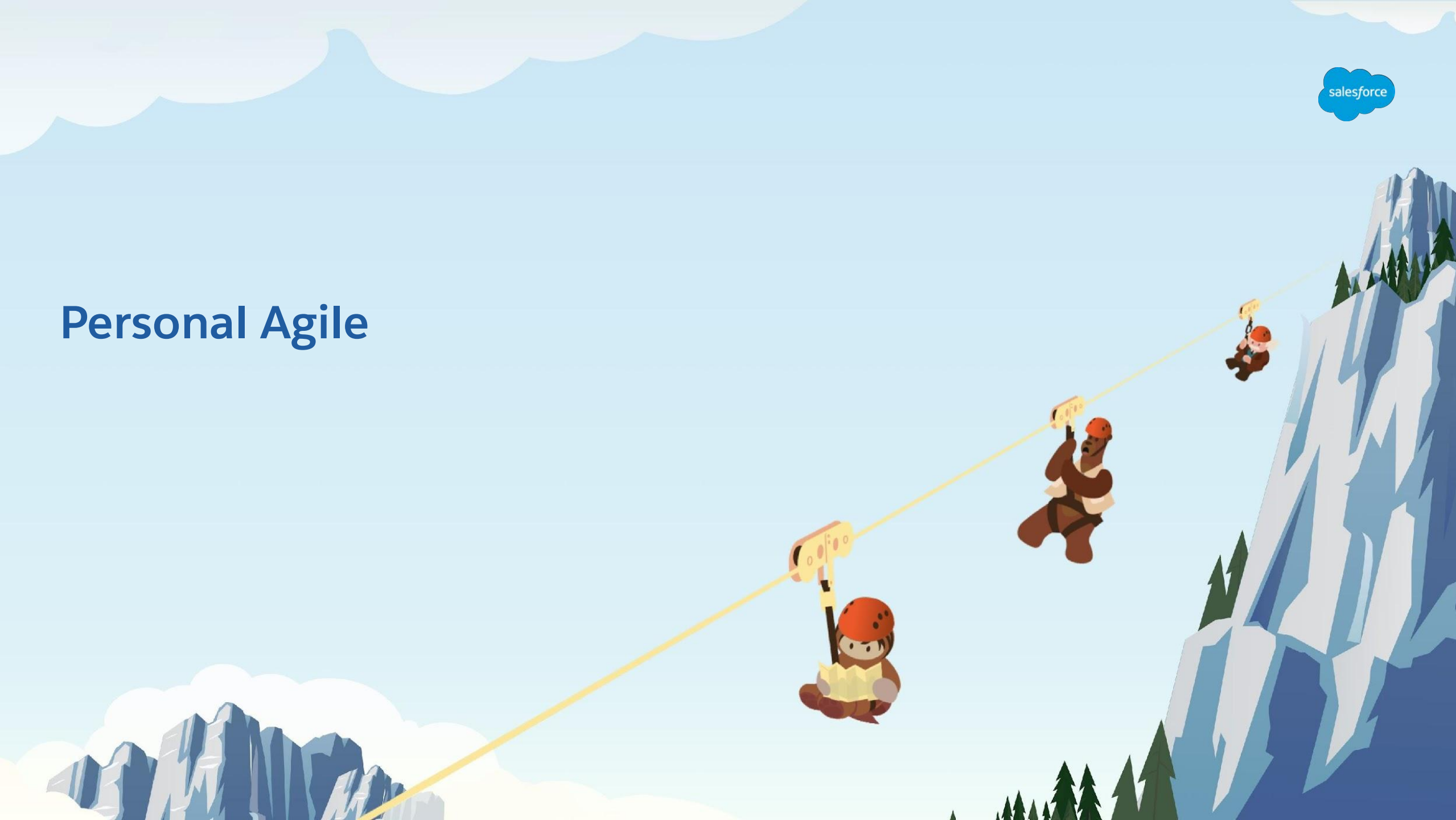# Real-World Example: Recruiting
Results

Recruiter request process revamped to reduce friction

Open reqs had recruiters assigned within 48-72 hours

Org size increased significantly in 2021, 2022

More Hires Sooner with Better Quality!

Personal Agile

Agile for 1 person??
There's a point to this…

Lot of processes to change

Tactical pass-downs interrupt things

Very easy to get randomized and lose strategic focus

Solution: "Personal Scrum"

1-week Sprints with a refined "Product Backlog"

Each Sprint has defined business goals

Sprint ends prior to weekly leader 1:1 ("Sprint Review")

Agile component: Weekly retros, focus on iterative delivery, business goals