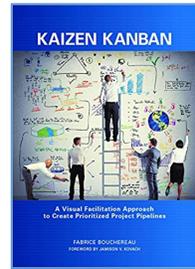


Lean and Agile Together Sparks Innovation

Kim Montes interviews Fabrice Bouchereau and Eddie Merla

When someone says they're writing a book, do you imagine years spent waiting for inspiration, toiling away in solitary confinement and facing numerous rejections that send the author back to the drawing board? Traditional book projects might look something like that.

This approach was turned on its head when Fabrice Bouchereau decided to write [Kaizen Kanban: A Visual Facilitation Approach to Create Prioritized Project Pipelines](#) with the support of his friend Eddie Merla.



Complementary Approaches and Synergy

When they met at Eddie Merla's PMP Prep course years ago, Merla had been practicing Agile and Scrum techniques for years and Fabrice Bouchereau was new to Agile methodology. His background in industrial engineering, process improvement and Lean manufacturing, with its focus on eliminating waste and adding value, seemed a natural fit with Agile. Bouchereau explained, "A few years ago, Agile was just starting to be known outside IT. Eddie was teaching for non-IT people getting into IT, or IT project managers expanding into other areas. The focus was on making things simple and I thought 'I'm already doing this!'"

The initial contact through the prep course expanded into a friendship. Eddie saw Fabrice's potential and encouraged him to continue his consulting practice instead of returning to the workforce as an employee. Eddie Merla founded Duende Project Management Services in 2004 and continues to present, teach and use Agile techniques for establishing PMOs and startups. He enjoyed working for himself and felt that Bouchereau would also thrive running his own business full time.

Bouchereau had established ProcessZen Consulting in 2011 to use Lean techniques to increase his clients' safety, quality and profitability. The Houston economic downtown slowed down business and Fabrice was considering going back to more traditional employment. The business blossomed when Eddie encouraged him. "He challenged me – pushing me to do my best and pulling me in the right direction."

When Merla and Bouchereau talk about working together on projects, the enthusiasm is tangible. Fabrice says, "We both have different styles, but we complement each other." Merla agreed, and noted that working together leveraged both their different expertise and the strong points of Lean and Agile.

The Book Project

Eddie and Fabrice have collaborated on presentations and projects, but Bouchereau feels that "one of the of the best collaborations we have is the book."

A book seemed like a natural collaboration project using Agile. "When using Agile, you want to produce something at the end of every interval." In this case, every iteration produced a chapter or a section.

With Fabrice's expertise in Lean and Eddie's extensive experience in Agile, Fabrice decided to take the best of both approaches when producing the book. "Lean and Agile together sparks innovation," Merla pointed out.

A Collaborative and Structured Approach

The approach was very collaborative and involved a community of Agile thinkers. "I ended up involving everybody!" said Bouchereau.

Although the Agile process was flexible, Fabrice used an organized method for working on the book. Below are some of the tools and methodologies that were most helpful on the project.

1. **Visioning**

The first stage in an agile project is defining the vision, which captures the essence of the project, sets the direction and guides the team.

In the case of the book project, the author envisions the finished product - the look and feel of the book. The front cover consists of the title, a graphic and a few selling points. The back cover lists the features that will appeal to the customer or reader. The table of contents lists all of the topics that benefit the reader.

Finding the right illustration for the cover was a collaborative effort and Bouchereau invited feedback from the community. In the first round, he shared a collage of different pictures and asked the team for their interpretation of the images they thought were most effective. Then he posted 4 or 5 book covers on social media and invited people to vote on the one they liked best. One concept represented a project pipeline but the feedback was, "we thought you were an engineer, and now you're a plumber?" The exercise pointed out the fact that everyone comes to a project with a different perspective.

2. **User Stories**

Once the overall vision was defined, the next step was to create user stories. A user story is a short, simple description of a feature from the perspective of the customer – or, in this case, the reader. For an example, the writers might develop these stories by saying, "As a reader, I will learn _____ so that I can _____ after reading this section." Each story became a chapter or sub-chapter.

Bouchereau found that one of the best ways to generate material was to give a presentation. Each presentation became a chapter or a section of the book and the speaker/writer received immediate feedback in the form of comments and questions from the audience.

3. **Release Planning**

After creating a common vision and developing user stories, Agile teams use release planning to outline what needs to be delivered, and when. Agile release planning is typically a simple way to do top-down planning and much less complex than traditional project management planning. Instead of elaborate Gantt charts and work breakdown structures, an Agile author might use a post-it note to represent each release.

For a book project, each release could be a chapter or a section – or it could be an edition in a series.

4. **Value-Based Prioritization**

Value-based prioritization is a core principle of Scrum, which is a popular methodology for agile software development. The prioritization process determines which activities must be done now and which can wait (or be eliminated), and the main idea is to deliver maximum value to the customer in the least amount of time.

When prioritizing the content that would be included in the book, the authors considered which ideas people in their courses and presentations were most attracted to. These ideas were prioritized and became the focus of the book.

5. **Time-Boxed Scrum**

The timebox concept is a cornerstone of Scrum methodology. A timebox is a previously agreed-upon period of time in which a person or team works steadily toward the completion of a goal. Each time box has its own deliverable(s) and when the time limit has been reached, work is stopped. Timeboxing forces focus and discipline, and the purpose is to "get the most value out of a short period of time," according to Merla.

Merla has taught courses such as how to roll out a PMO in 30 days using Scrum techniques. Fabrice used the same concept for the book, and each sprint was one week. During some periods, the goal was to produce a chapter every few days.

6. Iterative Approach

An iteration is a timebox during which development takes place and, in most cases, the time period stays fixed for the duration of the project. The Scrum community also uses the term "sprint" to relay the same concept.

Fabrice used an iterative approach to develop the book and started with visioning. The first task was to create the title, cover and feature list (or the "back of the book"). The outline then became the table of contents, which listed all of the planned chapters. After designing the "box" the pair was ready to tackle the content.

Fabrice first designed presentations for each chapter and presented each one 10-15 times to various professional organizations. After each presentation, he and Eddie would do a reflection and modify the content using feedback from the audience. The presentations and reflections served as testing, which led to continuous improvement. With the feedback and further research, they were ready to approach a publisher with the proposal.

7. Agile Teamwork

An agile team is usually cross-functional and has the people and skills necessary to create a useable product. Eddie talks often about the power of teamwork and the importance of leveraging and cultivating each member's "super power." "Agile projects are about collaboration – a team-driven effort. Teams are bottom-up instead of top-down and the leader doesn't have to be the most important person," Merla explained.

Kaizen Kanban evolved into a marketable product thanks to the help of an extended team. "Bill Weller assisted quite a bit with constant, relentless editing. He was a great sounding board for ideas," Fabrice said. The ASQ Publishing team's review process and graphics polished the draft of the book into a published work.

The Current Release

The goal of any iteration or release is a useful product, and Kaizen Kanban is a valuable tool. Subsequent releases could include French or Spanish versions to reach different markets. The book is also the basis for many presentations and workshops, helping attendees with project prioritization and continuous improvement.

I predict that there are many iterations to come.

About



Fabrice Bouchereau, PE, PMP®, SSBB is a licensed Industrial & Systems Engineer, author, speaker and trainer with over 18 years' experience changing company culture and leading improvement projects. Fabrice founded ProcessZen Consulting to help organizations leverage lean tools to achieve continuous improvement and meet today's innovation, quality and project management challenges.



Eddie Merla, PMI-ACP, PMP®, is the founder and owner of Duende Project Management Services. He is a PMP® preparation instructor and a trainer and coach on project management and leadership topics. He has over 25 years of project management experience including leading and coaching Agile teams.



Kim Montes, MBA, PMP®, is a Senior Project Manager at Houston International Insurance Group. She served as PMI Houston 2016 VP Marketing and led marketing efforts for the 2016 Conference & Expo and the recent Keep Houston Agile event. Kim enjoys writing and bringing good ideas to life.