Data-Driven, Experiential SPI (in Context, as a Team)

Or,

The Only Kind That Seems to Work







Data-Driven, Experi ... Huh?

Lots of ideas about how to do software development

Many can work "well enough" (& plenty of folks happy to tell you)

nes what takes

s a Team)

- Ideas are the easy part
- Changing how you we
- How you go about c'

What?

Data-Driven, Ex

How?

- Support the Fact of enange,
- (Realize) It's Knowledge Formation,
- Your Process is What You Do (so start where you are)
- (Align with) Mission & Data

Clue-Stick Stories



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Claim Check

What	
Data Driven	?
Experiential	?
(in Context)	?
(as Team)	?

How	
Support the Fact of Change	?
Your Process is What You Do	?
Knowledge Formation	?
Mission & Data	?

Seems to Work?	?
Otherwise fails?	?
Implies a Strategy?	?

Thanks to SASQAG for this idea.



NettyCo – From Many, One



If at First You Don't Succeed ...

In the Beginning



"NPI Process"



- ~18 Months
- ATT sez,
- Intel sez
- Motorola sez,
- GE sez
- Results FAIL

Third Try



- ~13 Months of "Oh my god!"
- 90% Y/Y Revenue Growth
- New SW Release
- 1st New HW Prod in 3 Yrs
- At Risk Pilots from 17 to 0
- >4x Dev Throughput Increase





NettyCo Business Results



	What	Before	After	Comment
	Vs TBG	1 Gen BehindLosing heads-up	Feature ParityWinning bake-offs	 NettyCo majority owner after Merger w/ competitor.
	Releases	 SW 14 months Late No New HW for 3 Yrs "Slipping" 1:1 - 2:1 	 SW Maint Release New SW Release New HW Product On-Time vs. Projections 	 "The best HW we've ever shipped." - SW Architect "The best SW we've ever put out." - HW Engr
	Anchor Cust.	Threatening to Abandon	Enthusiastic Reference	• Expanded use 30%
	Channels	 Babysitting Relationship Certifications Hellish Threat to Abandon 	• Release Cert with 1 issue (New Req. on HDWR)	 5 New Channels, Cert w/o Engineering Knowing
	PreSales	• 17 "at Risk" pilots	Closed all "at Risk" pilotsSale-Driven Feature Order	 >90% revenue growth
	Post Sales	• ~60 Critical > 90 days	0 Critical IssuesResolutions B4 escalated	Went looking for problems
	Product Dev	Exhausted Morale Shot	Having to chase them home.	 >4x throughput gain ~ 8x reduction in support load
0	8/09		7	jbullock@rare-bird-ent.com

08/



NettyCo Process & Results





"Do the work" – change for results.

	Q3		Q4	Q1	Q2	Q3
Prod	NPI Binders All at once Road	map	 Release Gating Release Scope 	Product Definition		Product Line Mgmt
Engr	 Task-Planning Product Slidewa Project Slidewa Priority Ritual 	re e		 Code Line Mgmt Integ Gating Mission/Measure 	 Tier III Sppt Kanban KM / wiki Use Cases 	 Architecture First Tech Debt Aware Fix Propagation
Test	 Five (5) Defect Lists No Defect Life-Cycl 		 Traceable REQ Test Kanban/LC Mission/Measure Articulated Mission 	 Defect Mgmt Product Quality Assessment(s) 		
	 2:1 dev slip >80% install fail ~ 0% fix succes Fantasy Proces Ship Showstop Partners Desert 	ers ng	 Maint Release w 0 Showstoppers 85% Fix Success 9 cust saves Channel cert 	 Field stability ~30x Better Off "Watch List" Dev progress 1:1 on HW & SW 	 Sales up 90% At-risk Pilots From 17 to 0 1-Pass Cert 	 SW Release New HW Product 4 -5 Adtl Channels Mkt Parity

8



Successes - Hard & Soft



Gating – Strong gating, verified via artifacts & review Baseline – Exhaustive baseline, change & migration discipline Commitments – Sacred

Who Says? - Dictated from above



Workflow – Kanban w lean/FDD hybrid.
"Kanban works when SCRUM & XP aren't flexible enough." ?Me & Corey?
"Planning" – No, projection of backlog, adjusted for projected discovery rate

Who Says? - Guys doing the work

How'd That Happen?

Current pain point - with measure and declaration of better Each change based on a theory of how stuff works

"Try it" - with time to adopt and willing to adjust prescription

Contextual targets - Coverage! (Nope.) Defect count! (Nope.)

- (Know, shipped defect count actually went up for first 2 quarters)
- Response time for & confidence in point fixes
- ("Time to spaghetti-toss" actually went up initially)
- Throughput of & agility to hit emerging requirements
- Got vs. think we've got. Customer custom vs. product / roadmap

Consistent - Only worked when we agreed. (Sometimes by fiat.)

"SPI" drove owned agreements vs. theoretical process

Claim Check - NettyCo

Claim		B4	After
Data Driven	N(d)	Ν	Y(a)
Experiential	N(d)	Ν	Y(b)
(in Context)	N(d)	Ν	Y(a)
(as Team)	N(d)	Ν	Y(c)

How To	B4	After
Support the Fact of Change	N	Y
Your Process is What You Do	N	Y(a)
Knowledge Formation	N	Y(b)
Mission & Data	½(C)	Y

Seems to Work?	+1
Otherwise fails?	+1
Implies a Strategy?	?

(a) What's messing up right now?

- 1 Process errors, 2 Miscommunication, 3 Bad commitments
- (b) Took 6 weeks to get a build that passed smoke test.
 - Took >4 weeks to ship first patch w / known contents.
 - First gated sw change in engineering took 5 tries.
 - 1 Room for practice, 2 Accept new info: Seems spinning a build is hard
- (c) In part imposed (by moi.) (See Cockburn's comments on C3 after Beck.)

(d) Anything can be overcome by genius and hard work.



Claim Check II - NettyCo.

Claim			B4	After	How To			B4	After
Data Driv	ven	N	N	Y	Support the Fact of Cha	inge	Ν	Ν	Y
Experien	ntial	N N	N	Y	Your Process is What Yo	1/2	Ν	Y(a)	
(as Team	n)	N	N	Y	Knowledge Formation	Ν	N	Y(b)	
		Mission & Data		N	½(C)	Y(c)			
Seems to Work?			+1						
Otherwise fails?			?		+1 (2?)				
Ir	mpli	es a St	trate	egy?		(Maybe			

(a) No specs? - Work on crashes. Or, first let's get a defect life-cycle. Or ...

(b) Data-driven modeling of what's working for us here and now.

(c) Mission in NPI - sort-of. Data, sort-of (anecdotes). Later, big deal – articulate mission & measures.

Your Tax Dollars At Work



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A Tale of Two Systems

Basselope-Control



116 CIs 1,500 Interfaces 10**6 Payloads >6*10**6 SLOC

Projected: 10,000 Changes

- @ 6 weeks to process
- Tend to serialize

Table I. <u>Example</u>	DESCRIPTI ON	SOURCE CSCI	DEST. CSCI(s)	UNIT OF MEASURE	LIMIT/ RANGE	ACCURACY	PRECISION/ RESOLUTION
IFA001	VELOCITY	CSCI-A	CSCI-B CSCI-B	ft/sec	20-1000	+20	10 ⁻³
IFA002	AZIMUTH	CSCI-A	CSCI-D	RADIANS	0 - π/2	_0.5	10 ⁻³
IFA003	ALTITUDE	CSCI-C	CSCI-A CSCI-B CSCI-D	ft	0-1500	+10	10 ⁻²



08/08/09

IRS Mgmt

Presentation Layer

Business Logic Layer

Data Access Layer

Data Source

XML + HTTP

XML + HTTP

The Rigid and The Clueless

IRS for the Basselope Brain



IRS Management System



Extreme (<- Get it?) examples of "competing" approaches side by side

IRS Automation – Making the explicit, comprehensive and front-loaded more so w/technology (Mil-STD-2167a by hand at this scale? Madness!)

• Two impl attempts: "We need more guys." / Use a db/change the work.

"Agile" database development – Iterative requirements, evolving design, automated rapid db build. (Anticipates Ambler &"Agile DB Development")

• Two approaches tool dev: Before (a-priori) / After (evolutionary)

Both, Both "Agile" & "Defined"

	IRS (Expanded, automated & integrated)	Tools (Incremental, ad-hoc organization, dynamic schema generation)
"Agile"	 Accelerate Interface Changes Integrate Early Easier Communication & Collaboration Closer to the Code (IRS injected into source files by some sub contractors) 	 Schema Change on Demand Evolving Requirements ->adtl attributes Whole new functions: analytic extracts, change life-cycle management, online browse & update Lightest "life cycle" that worked
"Defined"	 Massive, Elaborate Spec - More Elaborate w / Automation Formal Change Process - More Formal w / Automation Cross-team Controls – Stuff Never Explicitly Defined Before "Front Load" Integrations 	 SCM & Change Management on Tools Formalized ad-hoc db Definition Integrated with Program CM Shipped tools to 2167a Req. (Valuable activity, actually.)

What's "Better?" (Whack)



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"SEI"-Land More Definition **Up-Front** Impact-Driven Results-Driven Serious Validation Validation Hostile

"Agile"-Land **Less Definition** Post-Hoc Formal Verification Ad-Hoc Verification

Context determines what's important in your software development.

Context determines the most likely way to get what you want in your situation.

IEEE Computer: Improving the Development System Model



So, How?

Local agreed measures (directional is OK) – Data Driven Automated IRS: req scale, change volume, process timing & error rate DB: design change rate, requirements evolution, scut fraction

Adoption takes work – Experiential Learning

Automated IRS for "Basselope Brain" – Two tries to create it Once present, multiple updates for sub-contractors to "get it" DB (Schema Gen) – 3 cycles for dev to adopt. More for x-function

Drive to what matters to you (slogan-free, please) - In Context Valuable and possible to "get it right" Different "it" and "right" between IRS and Tools Valuable and possible to "accommodate change" Different "change" and "accommodate" between IRS and Tools

Reducing injected defects was secondary at best both times Finding defects turned out to be a bonus

Shared understanding and practice matters – Change as a Team



Concurrent Big-Brain SPI



"Official" Sponsored Group doing SPI

- Parallel "development practices & etc."
- Unlimited budget. Existed for >3 years
- No constraints on solution
- No contact with program teams
- Academic all-stars (Mostly CMU/SEI)

How's they do?

- Design Automation FAIL
 Design Integration FAIL
 Document Generation FAIL
 Change Management FAIL
- Compile / Build & Dev
- Unix / RISC price / performance



- FAIL

- FTW

Claim Check - Basselope

Ê	Bass	elope Brain	То	ol Dev	How	Го?
Claim	IRS B4	IRS	DB B4	DB	Hi IQ(e)	t the fact of change
Data Driven	½(a)	Y(b)	N(c)	Y	Ν	ocess is what you do dge Formation
Experiential	Ν	½(b)	Ν	Y	Ν	and Data
(in Context)	Ν	Y(b)	Y	Υ	Ν	
(as Team)	Ν	½(d)	Ν	½(d)	½(d)	Caama ta Wark?

(a) Missed several easy gains – conceptually blind.

Implies a Strategy?

(b) For IRS look at the learning process across programs.

(c) Several prior and concurrent tool efforts failed by declining to adapt

(d) "Team" extends how far?

(e) I've actually seen this fail >3x (ECE, Basselope, Watershed)

Claim Check II - Basselope

						E St	Base	selc	pe Brain	🚺 Тс	ol Dev	
	Hov	v To					IRS E	34	IRS	DB B4	DB	HI IQ
	Support the Fact of Change						Ν		½(a)	N	½(b)	Ν
	Your Process is What You Do					Ν		½(a)	Ν	½(b)	Ν	
	Kno	wledg	ge Fo	rmatio	on		Ν		½(a)	N	Υ	1⁄4(C)
Clai	Miss	sion 8	k Data	a			Y(d)		Y(d)	Y(d)	Y(d)	Y(d)
Data	a Driven	N	Y	N (a)	Y	N		Seen	ns to Work?			
Experiential N		N	1/2(a)	N	Y	Ν		Otherwise fails?				
(in Context)		Ν	Y	Y	Y	Ν		Implies a Strategy?				
(as ⁻	Team)	N	?	N	?	N						

(a) For IRS look at learning across programs & across teams

- (b) Direct boss Larry "the Wounded Gorilla" got it. Cross-function, not.
- (c) Their knowledge formation ($\frac{1}{2}$). Concept w/o testing ($\frac{1}{2}$, $\frac{1}{2} * \frac{1}{2} = \frac{1}{4}$)

(d) Knowing what you need not sufficient.



Claim Check III - Basselope

Claim	IRS B4	IRS	DB B4	DB	Hi IQ	How To		IRS B4	IRS	DB B4	DB	HI IQ	
Data Driven	Ν	Y	N (a)	Y	Ν	Support the Fact of Change		Ν	½(a)	Ν	½(b)	Ν	
Experiential	N	1/2(a)	N	Y	Ν	Your Process is What You Do		Y	½(a)	Ν	½(b)	Ν	
(in Context)	N	Y	Y	Y	Ν	Knowledge Formation		N	½(a)	N	Y	Ν	
(as Team)	N	?	Seem	s to	Wor	k?		+2 ("Basselope Brain" + Tool) (a)				;)	
			Otherwise fails?					+3 (a)(b)					
			Implies a Strategy?				Maybe? (a)(c)						

(a) Crossing scales: IRS across programs, DB single team / tool set

- (b) Now have failure after / concurrent with two successes
- (c) Know your mission. Realize you are ignorant.
 - Learn by doing. Refine with local data.
 - Test your solutions with real application.
 - Bringing people along is part of the exercise.

Personal SPI (Change) Initiatives

Who?	What	Practices	Strat	Win?
Techtran	Telephony App	Builds & Baselines, Code Stds, Design & Arch	Y	Y
Carrier	Heat Pump Controls	Whole SDLC over 3.5 years.	Y	Y
CSC	Vertical IT	Change Mgmt, Defect Mgmt, Build / Release, Req Mgmt	1/2	1/2
dbl (Moore)	Mfg "Order to Cash"	Independent Test, Defect Mgmt, Integration / CM	1/2	Ν
dbl (Prod)	DM Toolkit	Hand-waving attempt at anything in an SDLC	Ν	Ν
dbl (Test)	Automation SVCS	Test design& automation for distributed n-tier systems.	Y	Y
dbl (DB)	Y2K Banking	Work packet workflow definition and automation	Υ	Υ
Harris	Online Polling	Proj life-cycle, Integration & CM, Risk-Based Test Strategy, Req Mgm	Y	Y
"Swamp"	e-tailer	Defect routing, Unit test & Messaging Auto -> Interface / API Mgmt	1/2	Ν
"Swamp"	Life-Cycle Tools	Unit Test, Tools in Repository, Continuous Build, Incremental Dev	1/2	Ν
"Midwest U"	Alumni Assn.	Requirements Mgmt. Project Oversight	Ν	Ν
Hightower	SEM Appliances	Manifest, Acceptance & Regression Testing	1/2	1/2
ARC	Membership Org Auto	Acceptance Test, CM / Release, Proj Planning, Scope Control & Req	Ν	Ν
"TradingCo"	Exchange Auto.	Req-DrivenScalable Performance Testing	1/2	1/2
"NettyCo"	Multi-Protocol VPN	Gating, Workflow, Design & Code Stds, Defect Mgmt, Test Coverage, Req Mgmt, Smoke Test, etc.	Y	Y



Public Examples

Who	Clue	What	Improvement	Location
Oracle	Dist Code Mgmt	Custom repository	Practice, Protocol, Participation	http://queue.acm.org/detail.cfm?id=966796 (Steve Hagan)
Microsoft	Xteam APIs	Database of calls	Practice	?Webcast '05? - Can't relocate
IBM	Big-Q Quality	Localization of error	Process, Procedure, Policy	Late 1990s, system SW, since removed
Twitter	Uptime Matters	Migrate to SCALA	Practice	http://www.artima.com/scalazine/articles/twitter_on_scala.html
Drizzle	Code quality!	Tune it all	Practices, Policy, Participation	https://launchpad.net/drizzle
LOLCats	Pay attention	Ongoing SPI	Practice, Process, Policy	http://startpad.org/countdown/cheezburgers-and-lolcats-look- into-lazy-messy-backwards-way-starting-up
Linux / GIT	Web of Trust	Trusted Dist SCM	Practice, Process, Protocol	http://www.youtube.com/watch?v=4XpnKHJAok8
FDD Coad / DeLuca	Delivery perf	Lifecycle w/controls	Process, Practice, Procedure, Protocol, Policy, Participation	Feature Driven Develoment, Process chapter in "The Color Book"
SCRUM	Delivery perf.	Lifecycle & protocols	Process, Practice, Protocols	The first SCRUM book
Crosstalk	Mission / Context	Everything	Process, Practice, Procedure, Protocol, Policy, Participation	http://www.stsc.hill.af.mil/crosstalk/2009/07/index.html
Cleanroom	Design Hard	Statistical quality	Practice, Procedure, Protocol, Policy, Participation	http://infohost.nmt.edu/~shipman/soft/clean/
Victor Basili	Try it	Empirical SE	Process, Practice, Procedure, Policy	http://www.cs.umd.edu/~basili/papers.html
Bullock	Data-Driven	Do what it takes.	Process, Practice, Procedures, Protocol, Policy, Participation	http://www.ddj.com/blog/debugblog/archives/2008/08/five_ques tions_61.html



What Changes Worked?

Kind of Changes

Process	- SCRUM / Kanban
	- Staged Gate

- TDD / Most Tools

- Languages / IDEs

Procedure - Checklist (or Template) **Perf**

- Coding Standards
- Protocol - Inspection Vote
 - Stand Up
- Policy

Practice

- Showstoppers

Participation - On-Site Customer

- Feature Team

Measures of "Better"

- **Quality** Defects Shipped
 - Requirements Accuracy
 - Design Accuracy
 - "Technical Debt"
 - Throughput
 - Responsiveness
 - Precision
 - Efficiency
- "Don't break the build." Control Transparency
 - Estimates / Projections
 - Alignment

Change That Works? Institutionalized Cluelessness



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Across

- Segments
- Stacks
- Company Life-Cycle
- Product Maturity
- Critical Prod Attrib
- Driving Process Attrib

Sages of Software Engineering, invited to contribute to a book

"No, I'm retired and intend on staying that way."

- "Thanks but no thanks, I tried to make a difference ... but look at things now." "Sorry, not interested since it seems that software engineering has evolved
- Into a science of excuse methodologies ..."

Me (private email):

"This sounds like 'Everything would be fine if only those people would do what we big brains told them to."

Weinberg: *"If only."*

http://secretsofconsulting.blogspot.com/2007/04/why-would-old-consultant-retire.html

"Resistance to Agile"

Lean / Agile SPI-er:

'I like <redacted>'s approach ... "Do what I say. See that it works. Learn why it works. In about 6 months I'll let you try to improve on it for your context ..."

So "Agile"

Different (but not really) payload.(a) Same "Big Brain" delivery.

Better to invite others to solve a problem at hand with you. (Or offer to help them solve a problem they have.)

(a) "The Historical Roots of Agile Methods" – Abbas et al.
(a) "Iterative and Incremental Development: A brief history" – Larman & Basili

Claim Check – Big Brain SPI

	Claim	BB	Victims				
					How To	BB	Victims
	Data Driven	Y(a)	N(b)		Support the Fact of Change	Ν	Ν
	Experiential	Y(a)	N(b)		Your Process is What You Do	Y(a)	N(e)
	Схропонца	1(0)			Knowledge Formation	¹⁄₂(d)	N(e)
	(in Context)	Y(a)	N(b)		Mission & Data	N(d)	N(e)
	(as Team)	Y(a)	½(b)(c)				
				00001110	1(f)		
				Otherw	ise fails?		1(f)
				Implies a Strategy?			2(f)

(a) Big Brains: used data, learned experientially, in their context, together(b) Other people should respond like computers: "Just do as I say."(c) Sometimes the victims throw them out as a team (start of gelling)

Claim Check II – Big Brain SPI

Claim PP Victime			Victims	How To		BB	Victims
Da	ta Driven	Y(a)	N(b)	Support the	Ν	Ν	
Experiential Y(a) N(b)		Your Proces	Y(a)	N(a)(c)			
(as	(as Team) Y(a) ½(c)			Knowledge Formation		½(b)	N(c)
				Mission & D	Data	N(b)	N(c)
	Seems to Work?		2 1(d)				
	Otherwise fails?				1(d) (or N for Victi	ms)	
	Implies a Strategy?			jy?	2(d)		

(a) Big Brains, addressed their own situations, not someone else's

- (b) Often introspection based and untested
- (c) Don't start from their process, build (team) knowledge, or align w mission(d) Worked for big-brains. Not for others. Hmmmmm.

As a Team

"Developing software is a cognitive team sport." - Jim Bullock

"Team"

Team – a group of people:

- Largely self-directed internally,
- Mutually committed toward a shared result, ("Mission and Data")
- Using a shared understanding of how things work and, (Learning)
- Common standard(s) of practice & measures of success.

Performance is driven by what the team knows in common

- About how their discipline works
- About how they have agreed to work together.

Experi-what?

Experiential Learning

Wikipedia - "Experiential learning is learning through reflection on doing, which is often contrasted with rote or didactic learning ..."

"Experiential learning focuses on the learning process for the individual ..."

Lewin - " ...learning is best facilitated in an environment where there is dialectic tension and conflict between immediate, concrete experience and analytic detachment."

Also Kolb, Dewey, Piaget

Peter Schon Book - "The Reflective Practitioner: How Professionals Think in Action"

V. Basili – Empirical software engineering lab

"Experience in Implementing a Learning Software Organization" - K. Schneider, J. von Hunnius and V. Basili

"Conscious Development"

Knowing This, Design SPI

Design an SPI process that is based on:

- SPI as Doing Science & Adopting a Skill
- Data-Driven, In Context
- Experiential & As A Team
- Supports the Fact of Change
- It's Knowledge Formation
- Your Process is What You Do
- Drive from Mission and Data

"... you can't live your life in the baby seat. You've got to stand on your own

It's all been done ...

- TQM, Deming, Toyota, Lean, Critical Chain
- Satir, Schoen, Schein, Argyris, Senge
- Weinberg, DeMarco, (Highsmith), (Cockburn)
- Book: "Everyday Heroes of the Quality Movement"

How - Use A Change Kanban

P P P P

SPI Backlog P for "**Proposal**" WIP – A team can learn to do at most one new thing at a time.

Steps – It takes at least three reps In to really adopt a new practice.

Inventory P for "**Peformance**"

End of Part I - Credits

Cowen Park

OFFICE nomads http://cowenparkgrocery.com/

Grocery

Coworking http://www.officenomads.com/

individuality without isolation

Jim Bullock, jbullock@rare-bird-ent.com LinkedIn: www.linkedin.com/in/rarebirdenterprises

- SPI to Solve Business-Side Problems Ask for the one-sheet.
- Interim Management / Milestone Delivery / Augmentation
- Consulting All the advice you can stand

Books:

- Contributor The Gift of Time (Dorset House)
- Roundtable on Project Management (Dorset House) Coeditor
- Roundtable on Technical Leadership (Dorset House) Coeditor
- In progress How People Really Run Software Development Projects
- In progress Change in Technology Development Organizations: Learning On Purpose

SPI Talk 1.0 http://www.sasqag.org/