DISCIPLINED AGILE CERTIFICATION & PMI INTEGRATION UPDATES

Mark Lines
Vice President, Disciplined Agile
November 26, 2019
Initiatives under Way

• Enabling new services integration DA Partners around the world
• Training 200+ new DA instructors internationally by end of 2020, including 44 in November
• Introduction of a DA Champion program in PMI's 300 worldwide chapters - as of today 192 designated DA Champions
• Introduction of new Certifications
• Integration of PMI's recently acquired FLEX content for optimizing value streams and evolving SAFe teams and other scaling approaches
• Disciplined Agile workshops scheduled worldwide beginning in January - check Find Training and come back often as workshops will be added as they are scheduled
• Three types of training offered beginning January
• Refactoring of the DA knowledge base to allow for more extensibility outside of delivery teams and in non-IT situations
• A career path and skills development-based certification program for long-term growth
• Integration of our back-end IT systems and websites to support these initiatives
• And much more!
Inaugural PMI Disciplined Agile Instructor Training Workshop in Atlanta
Becoming an Instructor

• Attending a DASLM or CDAC course taught by DA thought leaders or approved Instructors is required to become a CDAI.

• For now that list includes:
  • Scott W. Ambler
  • Klaus Boedker
  • Mark Lines
  • Glen D. Little
  • Rod Bray
  • Joshua Barnes

• Watch for 2 or 3-day DASLM courses in your area (or request one!) taught by these Instructors.
NEW PARTNER
PROGRAM COMING
## Partner Benefits

### NOT OFFICIAL – Subject to Change

<table>
<thead>
<tr>
<th>Benefits</th>
<th>Training Partner</th>
<th>Adoption Partner</th>
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<tbody>
<tr>
<td>Courses Listed on DAC website, with links out to Training Partners’ registration pages</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>Partner Listing on Training Partner Page</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Partner Listing on Adoption Partner Page</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>Discounts on PMI Events (10%)</td>
<td>✓</td>
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<tr>
<td>Partner Logo Branding Kit</td>
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<tr>
<td>Discount on Training Licensing Fees (15%)</td>
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<tr>
<td>Ability to tailor courseware for clients *must be reviewed and approved by PMI</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Partner Support Webinars</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>Marketing collateral provided (standard presentations, materials, promotional items)</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>Keynote speaking engagement by DA SME (1 per year) *subject to availability and expense reimbursement</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>Presales webinar to key prospects by DA SME (2 per year) This might be worth selling outside of partnerships</td>
<td></td>
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<tr>
<td>Eligible to attend –DA partner day</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>Priority access to Disciplined Agile thought leaders for consulting and speaking engagements on an ‘as available’ basis</td>
<td>✓</td>
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### Training Partner: Solely run workshops, standard materials, mostly public courses

### Adoption Partner: SI Firms, train but also do assessment and coaching services. Can tailor courseware, optimize scaling situations with DA-FLEX, teach advanced courses
THE DISCIPLINED AGILE CHAPTER CHAMPIONS PROGRAM
The DA Chapter Champion Program is an opportunity for chapters to get engaged with DA to bring DA resources to their communities.
Disciplined Agile Chapter Champions Program

The goal of the **Disciplined Agile Chapter Champions** Program is to create easy ways for Chapter Members to take advantage of the Disciplined Agile offering.

We have been identifying local **Disciplined Agile Chapter Champions** who can lead local communities through education and peer collaboration.

- It is the Chapter’s discretion who they name as DA Champions (Chapter board decides).
- Having a DA Champion is encouraged, but not mandatory.
- DA Chapter Champions must be qualified, experienced in Agile approaches, deeply enthusiastic about promoting Agility and building local community.
- More than one DA Champion may be appointed per Chapter if desired.
- Certified Disciplined Agile Instructors (CDAIs), as well as employees of DA Adoption and Training Partners, may be appointed by their Chapters as a DA Chapter Champion but will not be permitted to provide paid training at their chapter to avoid any potential conflict of interest.
DA Chapter Champions – Chapter Benefits

- **A Hot, New Local Offering** - Participating chapters will have a robust Agile offering that spans the entire Agile landscape and allows those with existing certifications to build new capabilities.

- **Ways to Draw in New Members** - PMI will list local classes in a centralized training directory on the PMI/DA web sites, where it will be visible to local prospects who are not already chapter members.

- **Free and Discounted Materials** - 10 copies of “Choose your WoW!” book (DA BOK) will be sent out to each Chapter that has a Champion for distribution at their discretion. Additional copies will be available at a discount.

- **Additional Support On the Way** – PMI Chapter Development establishing guidelines for growth and participation.
DA Champion Qualifications

- **The Experience to be a Local Agile Leader** - Agile knowledge, experience and/or certifications

- **A Willingness to Learn** - Willing to pursue DA Certification ASAP (within 6 months)

- **The Drive to make a Difference** - Enthusiasm and a desire to build a local community of consequence

- If interested, the chapter president should send the name and email of their designee to their chapter partner and [Chris.Mairs@pmi.org](mailto:Chris.Mairs@pmi.org)
DA Champion Responsibilities (the details)

DA Champions must want to lead and be highly engaged!

Assist with planning local engagement: webinars, communications, promotions

Continuing their DA education via
- DA Consortium Membership (www.disciplinedagileconsortium.org)
- Subscribing to the DA newsletter
- Attending DA webinars
- Sharing DA news with Chapter
- Ensuring DA Workshops are regularly scheduled in the Chapter area
- Encouraging DA speaking topics at Chapter events
- Encouraging Agile practitioners from other communities (Scrum, SAFe) to enhance their capabilities by joining PMI and obtaining a DA certification
- Providing feedback to PMI on ways to improve all aspects of DA including its membership support and product offerings
Points of Contact

Need to confirm a Chapter DA Champion?
Global Chapter Associate, Chris Mairs
Chris.Mairs@pmi.org

Need help navigating your way?
Advisor, DA Chapter Champion Program, Beth Ouellette
Beth.Ouellette@pmivolunteer.pmi.org

Speaking Engagement Requests:
https://www.pmi.org/about/press-media/speaking-engagements
Our Industry needs better an Agile Certification Program

We collectively need to raise the tide, with regards to expectations of agile skills and experience before we reward agilists with certs and more importantly, before we trust agile teams with mission critical initiatives.

Let’s float the agile teams’ boats collectively higher around the world with increased competence

Photo by Andrew Buchanan on Unsplash
Issues with Current Certification Schemes

- Expensive
- Poor credibility
- Often little effort required, guaranteed-to-pass tests, no experience requirement
- Content duplicated across certification programs often with conflicting advice
- Credit not provided for other certifications and experience
- Course content often conflicts with your organization’s current standards, governance, and terminology
To create the world’s most respected, comprehensive, credible, and worthwhile Agile Membership and Certification body in the world to enable organizations and community members to maximize their enterprise agility potential.
DA Membership & Certification Program Improvements - Principles

- We will provide a worldwide Disciplined Agile community for career and skills development, with increased job and networking opportunities.

- Our Principles
  - Give credit for existing knowledge and experience
  - Certifications must be earned
  - Certifications must be seen as worthwhile and credible
  - Teams that work together should train together
  - As a not-for-profit, PMI will provide cost-effective training options including large scale discounts, localized pricing, with internal training and tailoring options
THE DA LEAN SCRUM MASTER CERTIFICATION PATH

An Overview
Disciplined Agile Lean Scrum Master (DALSM) Learning Module Building Blocks

These modules may be taught individually or bundled up into workshops for certification.
CDA Certification Prep Workshop (4 days)

For those new to agile and wish to apply for Certified Disciplined Agilist (CDA)
Ideal for: PMPs, those new to agile and lean

- Workshop includes 1 test attempt
- CDA awarded upon passing test
- CDAP and/or DALSM awarded upon obtaining experience

**CERTIFIED DISCIPLINED AGILIST**
A CDA demonstrates knowledge of DA but lacks 2 years experience on Agile teams

**CERTIFIED DISCIPLINED AGILE PRACTITIONER**
A CDAP demonstrates knowledge of DA plus 2 years practitioner experience on Agile teams

Course content

- Pragmatic Agile (1/2 day)
- Choose your WoW for Practitioners (1/2 day)
- Foundations of Disciplined Agile (1 day)
- Foundations of Lean (1 day)
- Foundations of Agile (1 day)
DALSM Certification for Experienced Agilists (3 days)

For those that have Agile (but not Lean) knowledge and 2 years Agile experience and wish to attain the CDAP or DASLM designation
Ideal for: CSMs, CDAPs with Leadership experience

- Workshop includes 1 test attempt to apply for either:

**CERTIFIED DISCIPLINED AGILE PRACTITIONER**
A CDAP demonstrates knowledge of DA plus 2 years practitioner experience on Agile teams

**CERTIFIED DISCIPLINED AGILE LEAN SCRUM MASTER**
A DALSM demonstrates knowledge of DA plus 2 years leadership experience on Agile teams

Course content

- Pragmatic Agile (1/2 day)
- Choose your WoW for Practitioners (1/2 day)
- Foundations of Disciplined Agile (1 day)
- Foundations of Lean (1 day)
- Foundations of Agile (1 day)

Prerequisite knowledge

Certification awarded upon attaining experience
Upgrade Scenarios to DALSM from CDA and CDAP

We will offer a 1-day Virtual Course on Foundations of Lean

- Will include a test code for one attempt at DALSM
- Requires 2 years of Agile Leadership experience (ScrumMaster, Team Lead, RTE, etc.)

Course content

- Pragmatic Agile (1/2 day)
- Choose your WoW for Practitioners (1/2 day)
- Foundations of Disciplined Agile (1 day)
- Foundations of Lean (1 day)
- Foundations of Agile (1 day)

Prerequisite knowledge

A DALSM demonstrates knowledge of DA plus 2 years leadership experience on Agile teams

CERTIFIED DISCIPLINED AGILE LEAN SCRUM MASTER
DALSM Certification for Experienced Lean Agilists (2 days)

For those that have **both** Agile and Lean knowledge and 2 years experience and wish to attain CDAP or DALSM designation

Ideal for: **PMI-ACPs**, SPCs

- Workshop includes 1 test attempt to apply for either:

  - **CERTIFIED DISCIPLINED AGILE PRACTITIONER**
    - A CDAP demonstrates knowledge of DA plus 2 years practitioner experience on Agile teams

  - **CERTIFIED DISCIPLINED AGILE LEAN SCRUM MASTER**
    - A DALSM demonstrates knowledge of DA plus 2 years leadership experience on Agile teams

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Pragmatic Agile (1/2 day)

Choose your WoW for Practitioners (1/2 day)

Foundations of Disciplined Agile (1 day)

Foundations of Lean (1 day)

Foundations of Agile (1 day)

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Certification awarded upon attaining experience

Course content

Prerequisite knowledge

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A CDAP demonstrates knowledge of DA plus 2 years practitioner experience on Agile teams

A DALSM demonstrates knowledge of DA plus 2 years leadership experience on Agile teams

DA Certification Overview 28 NOVEMBER 2019 24
DISCIPLINED AGILE COACHING CERTIFICATION
An Overview
CDAC Certification Prep for Agile Coaches (3 days)

For those who are currently coaching and wish to up their coaching game using DA and understand how to guide enterprise transformations. Ideal for coaches with 3 years experience coaching or currently working towards it. DALSM certification preferred but not mandatory.

- Workshop includes 1 test attempt
- Certification awarded upon passing test and completion of 3 years coaching experience

Course content:
- Essential Coaching Skills (1 day)
- Leading Choose your WoW (1 day)
- Pragmatic Agile (1/2 day)
- Foundations of Disciplined Agile (1/2 day)
- Foundations of Lean (1 day)
- Foundations of Agile (1 day)

Prerequisite knowledge:

A CDAC demonstrates knowledge of DA and has 3 years coaching experience.
OPTIMIZING YOUR TRAINING BUDGETS WITH TAILORED TRAINING PLANS
Leadership Growth

Various Agile Career paths for Leaders

Leader for DA Lean & Scrum Teams → CERTIFIED DISCIPLINED AGILE LEAN SCRUM MASTER

Leader of Lean Non-IT Projects → CERTIFIED DISCIPLINED AGILE LEAN PROJECT MANAGER

Coach of DA Teams → CERTIFIED DISCIPLINED AGILE COACH

Manager of Agile Teams → DISCIPLINED AGILE LEAN MANAGER
Career Growth for Large Scale Agile Programs

DA Program Manager → CERTIFIED DISCIPLINED AGILE PROGRAM MANAGER

DA Program Consultant for optimizing SAFe → CERTIFIED DISCIPLINED AGILE PROGRAM CONSULTANT

Credit given for SPCs, RTEs

Coming Q2
Disciplined Agile Career & Growth Path

Executive
- DA Program Consultant (DAPC)
- DA Instructor Trainer (DAIT)

Master
- DA Program Manager (DAPM)
- Certified DA Instructor (CDAI)
- Certified DA Coach (CDAC)

Professional
- DA Lean Project Manager (DALPM)
- DA Lean Manager (DALM)
- DA Lean Scrum Master (DALSM)
- Certified DA Practitioner (CDAP)

Associate
- Certified Disciplined Agilist (CDA)

Specializations
- DA Financial Specialist
- DA Marketing Specialist
- DA Product Owner
Training Programs

Our Recommendations:

- Train all teams on the DA Toolkit
  - Better decisions lead to better outcomes
  - More effective retrospectives
  - Less reliance on coaches, more effective coaches
- Team members should become Certified Disciplined Agilists or Certified Disciplined Agile Practitioners
- Team leaders should become DA Lean Scrum Masters and Certified DA Coaches
- Additional certifications as they become available (2020)
  - DA Lean Project Managers, DA Lean Managers, DA Program Managers, DA Program Consultants
Training Options

- **Delivery Methods**
  - Instructor Led Training (ILT)
    - Public classes, Private classes, Virtual-live ILT
    - External Trainers, Internal Trainers
  - Computer Based Training (CBT)

- Find Training schedule at
REFACTORIZING & ENHANCEMENT OF CONTENT
DA- FLEX: The Value Stream of the Effective Organization
Improve Flow: SAFe Optimization with DA-FLEX

Start where you are

Understand
Essential SAFe is often not enough
Large scale or Portfolio SAFe is often too much
How do you find the right mix for you?
PMI provides:
A one-day mini assessment clarifying high-level opportunities

Optimize
Upskill your Teams on the DA Toolkit
Understand and optimize for context by choosing your Way of Working (WoW)
Certified Partners provide:
DA Assessment
Bespoke Training and Certification
- Instructor Lead Training (ILT)
- Virtual Live ILT
Choose your WoW Starter Packs for SAFe Coaching

Accelerate
Accelerate Value Delivery by Improving Flow with DA FLEX
Certified Partners provide:
Workshops to improve flow
Coaching & Guided Continuous Improvement (GCI)

* Certified Partners could be sourced by an internal CoE
Enterprise Agility: Process Blades (Current)
Enterprise Agility: Process Blades – Coming March 2020
The Process Goals of Disciplined Agile Delivery (Current)

**Inception**
- Form Team
- Align with Enterprise Direction
- Explore Scope
- Identify Architecture Strategy
- Plan the Release
- Develop Test Strategy
- Develop Common Vision
- Secure Funding

**Construction**
- Prove Architecture Early
- Address Changing Stakeholder Needs
- Produce a Potentially Consumable Solution
- Improve Quality
- Accelerate Value Delivery

**Transition**
- Ensure Production Readiness
- Deploy the Solution

**Ongoing**
- Grow Team Members
- Coordinate Activities
- Address Risk
- Evolve Way of Working (WoW)
- Leverage and Enhance Existing Infrastructure
- Govern Delivery Team

Inception: Get the team going in the right direction.
Construction: Incrementally build a consumable solution.
Transition: Release the solution into production.
Ongoing: Improve and work in an enterprise aware manner.
# Team Agility: Process Goals – Coming March 2020

<table>
<thead>
<tr>
<th>Team Agility: Process Goals – Coming March 2020</th>
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<tbody>
<tr>
<td><strong>Explore Scope</strong></td>
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<td><strong>Develop Common Vision</strong></td>
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<td><strong>Form Team</strong></td>
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<tr>
<td><strong>Evolve Way of Working (WoW)</strong></td>
</tr>
<tr>
<td><strong>Align with Enterprise Direction</strong></td>
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HOW TO FIND TRAINING

www.disciplinedagaileconsortium.org