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Workshops Training and Other Events

A list of events I have worked. Events are things that have been prepared for, and worked. They do not count normal day-to-day activities.

2023 Completed Events

Filter:

| Event | Туре | Location | Date | Comments |
|---|--------------------------|---------------------------------|------------|---|
| SAFe 6.0 Update | Certification Upgrade | Online | 2023-03-17 | Updated SAFe certification to the latest |
| Product Management Training | Coaching, Training | Online | 2023-03-01 | Bespoke training for Product Management organization (round 2) |
| Product Management Training | Coaching, Training | Online | 2023-02-27 | Bespoke training for Product Management organization. |
| Leadership Training | Coaching, Training | Online | 2023-02-16 | Bespoke training for Leadership organization (round 2) |
| Leadership Training | Coaching, Training | Online | 2023-02-13 | Bespoke training for Leadership organization. |
| What is the Impact of a Reorg on an Agile Transformation? | Blog | FiveWhyz.com, HansSamios.com | 2023-01-25 | Reducing the Impact of the Reorg on the Transformation to Agile |

2022 Completed Events

| Event | Туре | Location | Date | Comments |
|-------------------------------|----------|----------|------------|---|
| PI Planning | Coaching | Weston | 2022-11-15 | Support for PI Planning event of new Train. |
| Teams in a Scaled Environment | Training | | | Bespoke team training for teams operating in a multi-team situation |

| Event | Туре | Location | Date | Comments |
|---|-----------------------|----------|------------|--|
| Leadership Summit and LACE Workshop | Coaching, Training | Online | 2022-11-02 | Post initial set of kick off events, need to get buy-in on and establish a Lean Agile Center of Excellence for the organization. |
| PI Planning | Coaching | Weston | 2022-10-18 | Support for PI Planning event of new Train. |
| Organizational Assessment Workshop | Coaching, Training | Online | 2022-10-05 | As a result of discovery process - interviews, surveys, discussions, etc workshop to co-create aligned transformation plan. |
| Assessment Results and Alignment Workshop | Coaching | Online | 2022-10-05 | Following surveys, interviews, and observation co-create an agile transformation plan for an organization |
| Understanding ITIL | Learn | Online | 2022-09-27 | Understand the impact of ITIL on an agile transformation |
| PI Planning | Coaching | Weston | 2022-09-27 | Support for PI Planning event of new Train. |
| Teams in a Scaled Environment | Training | Online | 2022-09-20 | Bespoke team training for teams operating in a multi-team situation |
| SAFe for Architects | Training | Online | 2022-08-25 | Collaboration training for architects. SAFe event |
| Approaches to Presenting Flow Efficiency vs Resource Efficiency | Coaching | Online | 2022-08-16 | Coaching coaches and leadership on improving how we present flow efficiency |
| Feature Prioritization Workshop | Coaching, Training | Online | 2022-08-19 | Just-in-time training and then coaching based of Feature prioritization and sequencing based on Cost of Delay |
| SAFe for Architects | Training | Online | 2022-08-01 | Collaboration training for architects. SAFe event |
| Agile Mindset Workshop | Participate | Online | 2022-07-28 | Cross training of different agile approaches in the organization - understand what others are being taught |
| Building Influencer Muscles | Coaching | Online | 2022-07-13 | Focussed discussion with architects aimed at improving their ability to influence an organization. |
| Keeping Retrospectives Fresh | Training | Online | 2022-07-07 | Workshop helping Scrum Masters in particular keep retrospectives fresh and useful |
| Agile Media Club | Coaching | Online | 2022-06-22 | Establish lightweight learning for interested folks. Focus on blog posts, videos, podcasts rather than books. |
| Plant UML | Learn | Online | 2022-06-10 | Learn how to model using Plant UML |

| Event | Туре | Location | Date | Comments |
|---|-----------------------|-----------------|------------|---|
| Personas Workshop | Coaching, Training | Online | 2022-06-08 | Just-in-time training and coaching to create key customer personas for an organization |
| Value Stream Mapping Level Set | Coaching, Training | Online | 2022-06-08 | Just-in-time training and coaching to help deliver improved developer experience using Value Stream Maps as a tool |
| Experiment - Setup Confluence for Agile Knowledge Base | Coaching | Online, Tool | 2022-06-02 | Idea is building a knowledge base for agile based on wiki like Frequently Asked Questions |
| SAFe for SM | Coaching, Training | Online | 2022-05-24 | Train Scrum Masters on the basics of working at scale. SAFe event |
| Feature Prioritization Workshop | Coaching, Training | Online | 2022-05-06 | Just-in-time training and then coaching based of Feature prioritization and sequencing based on Cost of Delay |
| Stakeholder Management Workshop | Coaching, Training | Online | 2022-05-04 | Just-in-time training and coaching to identify stakeholders for an organization and develop a plan to address the stakeholders |
| Feature Writing Party | Coaching | Online | 2022-04-29 | Just-in-time workshop to establish initial set of features |
| Empathy Interviews for Transformation | Interview | Online | 2022-04-28 | Formal empathy interviews to gauge where we are with the transformation. |
| SAFe for PO PM | Coaching, Training | Online | 2022-04-19 | Train Product Owners and Product Managers in the basics of working at scale. SAFe event. |
| How Do We Move Away from "Trust But Verify" Approach to Compliance? | Publish | Online | 2022-04-08 | Change thinking around compliance. |
| SAFe for Architects | Pair | Online | 2022-04-04 | Pair on training this event. SAFe event. |
| Empathy Interview Training | Participate | Online | 2022-03-27 | Learning about formal empathy interview process |
| Cyber Security Maturity Model | Learn | Online | 2022-03-22 | Understand impact of model on an Agile Transformation |
| What Is The Difference Between Value Stream Identification (VSID) and Value Stream Mapping (VSM)? | Publish | Online | 2022-02-11 | Initial version developed and published |
| Enterprise Architect Coaching | Coaching | Online | 2022-03-01 | Work with architects to improve how they influence the organization and drive architectural initiatives - developer experience improvements, improving modeling, immutable object system, decommissioning old systems |
| Feature Writing Party | Coaching | Online | 2022-02-07 | Just-in-time workshop to establish initial set of features |

| Event | Туре | Location | Date | Comments |
|--|-----------------------|----------|------------|---|
| Agile Media Club | Coaching | Online | 2022-02-04 | Establish lightweight learning for interested folks. Focus on blog posts, videos, podcasts rather than books. |
| Scrum Master CoP Setup | Coaching, Lead | Online | 2022-02-01 | Setup SM CoP |
| PI Planning | Coaching | Online | 2022-01-19 | Support for PI Planning event of new Train. SAFe event |
| Transformation Leadership Team Setup | Coaching | Online | 2022-02-01 | Coaching to set up the formation of a leadership team responsible for the transformation of a division. |
| PI Planning Readiness Workshop | Training, Coaching | Online | 2022-01-27 | Workshop to discuss requirements for successful PI Planning event. |
| Agile Product Delivery Assessment | Coaching | Online | 2022-01-26 | Assist in running of first assessment at the organization. SAFe event |
| PI Planning | Coaching | Online | 2022-01-19 | Support for PI Planning event of new Train. SAFe event |
| LACE PI Planning Event | Participate | Online | 2022-01-18 | As part of overall LACE determine plan for next Pl. SAFe event |
| PI 1 Inspect and Adapt Event | Coach | Online | 2022-01-13 | Work with RTEs through initial I&A event. SAFe event |
| SAFe for SM | Coaching, Training | Online | 2022-01-10 | Train Scrum Masters on the basics of working at scale. SAFe event |
| Team and Technical Agility Assessment | Coaching | Online | 2022-01-06 | Assist in running of first assessment at the organization. SAFe event |

| Event | Туре | Location | Date | Comments |
|---|-----------------------|----------|------------|--|
| SAFe for Teams | Coaching, Training | Online | 2021-12-20 | Introduction to SAFe using SAFe for Teams as a base. SAFe event |
| SAFe for Product Owner Product Manager (POPM) | Coaching, Training | Online | 2021-12-13 | Train Product Managers and Product Owners on the basics of working at scale. SAFe event. |
| Feature "Smells" Workshop | Workshop | Online | 2021-12-09 | Review of common (SAFe) Feature definition anti-patterns. |

| Event | Туре | Location | Date | Comments |
|---|------------------------------|--------------------------------|------------|--|
| Kanban Team | Coaching | Online | 2021-11-29 | Discussion about use of Kanban for support teams and how they will execute in multi-team situation |
| Establish Execution Events | Coaching | Online | 2021-11-17 | Series of workshops and facilitated events aimed at establishing cadence work execution of PI Planning commitments |
| SAFe for Scrum Master | Certification, Enablement | Online | 2021-11-17 | Make sure I am up to date with latest (SAFe 5.1) materials. |
| PI Planning Event | Coaching | Online | 2021-11-10 | Fast track ART launch. 5 weeks ago there was no alignment to value stream. 2 weeks ago we had no Features. SAFe event. |
| SM and PO Roles in PI Planning Event | Coaching | Online | 2021-11-08 | Workshop aimed at helping people understand their roles as they head into the PI Planning event. Included Q&A. |
| Estimating and Forecasting using Story Points | Coaching | Online | 2021-11-04 | Back to basics workshop aimed at helping people who are used to estimating in hours understand and why story point estimating approach works |
| SAFe for Teams | Coaching, Training | Online | 2021-10-27 | Kick off Teams using SAFe for Teams as a base. SAFe event |
| Feature Writing Party | Coaching | Online | 2021-10-27 | Series of workshops aimed at getting first list of Features ready for initial PI planning event |
| Value Stream Identification | Coaching | Online | 2021-10-21 | Workshop to develop alignment of virtual ART structure to Value Stream and determine steps to launch |
| Leading SAFe | Coaching | Online | 2021-10-11 | Establishing leadership understanding of Lean and Agile thinking. SAFe event |
| What is the Purpose of a System Demo in SAFe? | Coaching | Online | 2021-09-30 | Workshop and materials aimed at helping people understand use of System Demo in SAFe. See link for general discussion used as preparation. |
| What's The Difference Between Kanban and Scrum? | Coaching | Online, Video, Materials | 2021-09-20 | Idea is to answer questions associated with Kanban implementations and improve the discipline so that it is more aligned with a real Kanban approach. Materials in link were used as basis |
| Agile Next Steps Workshop | Coaching | Online | 2021-09-09 | Group was interested in taking their agile implementation to the next level. From team orientation, to multi-team. From multiple work intake systems to single intake system. From using agile thinking to systems and lean thinking approaches. Also interested in rejuvenating in place agile practices such as estimation, forecasting, reinforcing behaviors |

| Event | Туре | Location | Date | Comments |
|---|------------------------------|----------|------------|--|
| Strategy Back-brief | Coaching | Online | 2021-09-08 | Discussion aimed at really understanding whether the strategy and vision is really being acted on. Resulted in an experiment to use back-brief approach. |
| SAFe for Product Owner Product Manager (POPM) | Certification, Enablement | Online | 2021-09-07 | Make sure I am up to date with latest (SAFe 5.1) materials. |
| SAFe for Teams | Certification, Enablement | Online | 2021-09-03 | Make sure I am up to date with latest (SAFe 5.1) materials. |
| Leading SAFe | Certification, Enablement | Online | 2021-09-03 | Make sure I am up to date with latest (SAFe 5.1) materials. |
| Understanding CoD and WSJF | Workshop | Online | 2021-08-31 | Workshop aimed at helping people understand the why, how and application of economic decision making approach |
| Leading SAFe | Coaching | Online | 2021-06-01 | Establishing leadership understanding of Lean and Agile thinking. SAFe event |
| SAFe for Teams | Coaching, Training | Online | 2021-05-24 | Kick off Teams using SAFe for Teams as a base. SAFe event |
| Jira Align Training | Learning | Online | 2021-05-19 | Train the trainer approach to adoption of Jira Align |
| Improve Scrum Master Effectiveness Sessions | Coaching | Online | 2021-05-10 | Series of sessions aimed at helping Scrum Masters establish and become more effective in their role |
| SAFe Assessments (TTA and APD) | Coaching | Online | 2021-03-15 | Coaching of RTE and SMs in purpose and method for working through the assessments, and using the information to determine improvement opportunities. |
| PI Planning Event | Coaching | Online | 2021-02-15 | Fast track ART launch. 5 weeks ago there was no alignment to value stream. 2 weeks ago we had no Features. SAFe event. |
| SAFe for Teams | Coaching | Online | 2021-02-01 | Kick off Teams using SAFe for Teams as a base. SAFe event |
| Leading SAFe | Coaching | Online | 2021-01-25 | Establishing leadership understanding of Lean and Agile thinking. SAFe event |
| Roles Workshop | Coaching | Online | 2021-01-12 | Workshop aimed at helping people understand their roles as they move to SAFe and Agile |

2021 Completed Events

| Event | Туре | Location | Date | Comments |
|--|-----------------------|----------|------------|---|
| Let it Flow: Using Flow Metrics to Combat Cognitive Overload | Webinar | Online | | Discussion about using basic flow metrics to help detect where cognitive load is building as well as justifying investment in "debt" to address. |
| Executive Overview | Coaching, Training | Online | 2020-12-04 | 6-hour Executive Overview workshop for SAFe Transformation, materials, discussions, breakouts, and activities |
| Executive Overview | Coaching, Training | Online | 2020-11-18 | 6-hour Executive Overview workshop for SAFe Transformation, materials, discussions, breakouts, and activities |
| Mini Big-room (PI-) Planning Event | Coaching | Houston | 2020-11-11 | Purpose was to get to an aligned quarterly roadmap across 4 Teams and determine what was really possible (map demand to supply). Standing start to successful event in less that 2 weeks. SAFe event. |
| Scaled OKRs Intro and Overview | Webinar | Online | 2020-10-30 | Discussion with Icon coaches on how to help organizations put OKRs in place. |
| Six Decades of Software Engineering with Mary Poppendieck | Webinar | Online | 2020-10-20 | Listening to Mary help us understand that what is old is new again. Especially interested in the discussion on resiliency in systems we deploy, or rather how they are not resilient. |
| Introduction to Confluence | Coaching, Training | Houston | 2020-10-15 | Help establish Confluence as the corporate knowledge base by providing background. Selfdeveloped materials. |
| SAFe for Teams | Coaching, Training | Houston | 2020-10-05 | Kick of Teams using SAFe for Teams as a base. SAFe event |
| SAFe for Teams enablement | Enablement | Online | 2020-09-23 | Ensure I am up to date with latest message from SAFe |
| The Power of Culture in SAFe Adoption | Webinar | Online | 2020-09-01 | Basic discussion on the link between SAFe and changing an organization's culture. Included good discussion of Westrum "cultural spectrum" model. |

| Event | Туре | Location | Date | Comments |
|---|-----------------------|-----------|------------|---|
| Applying Team Topologies to Large Supply Chain Networks | Webinar | Online | 2020-08-18 | Based on the book "Team Topologies" is there something we can apply to larger scale. Answer "yes" - applicable in general. |
| Measure and Improve Your SAFe Maturity | Webinar | Online | 2020-08-05 | Sales pitch for Agility Health radars. |
| SAFe Release Train Engineer | Certification | Online | 2020-07-21 | SAFe RTE course. Attended so I can also give the course. |
| Dynamic Re-Teaming | Coaching | Worldwide | 2020-07-07 | How to get good at Teams changing their personnel. Presentation to Coaches CoP. |
| Agile HR | Webinar | Online | 2020-06-24 | Basic presentation on the changes in HR that work with an Agile transformation. Presented in SAFe context. |
| SAFe Managed Contract with Dean Leffingwell | Webinar | Online | 2020-06-24 | Improved guidance on Agile contracts set up for win-win. Presented in SAFe context. |
| CoD and WSJF with Don Reinersten | Webinar | Online | 2020-06-22 | Useful discussion improving SAFe guidance on these subjects. Includes integration with standard accounting practice. |
| Estimating Epics in Support of Participatory Budgeting and Portfolio Flow | Webinar | Online | 2020-06-18 | Useful discussion on changes coming to Lean Portfolio Management guidance of SAFe 5 |
| SAFe 5 Program Consultant Upgrade | Certification | Online | 2020-06-10 | Review enablement, review new content, take practice test, pass test |
| Leading by Example with Personal Agility | Coaching; Training | Worldwide | 2020-05-21 | Session on being authentic through application of personal Agility; ideas on self-improvement |
| Dynamic Re-Teaming | Coaching | Worldwide | 2020-05-12 | How to get good at Teams changing their personnel. Internal presentation. |
| Anti-patterns (Smells) Work | Coaching | Worldwide | 2020-05-11 | What Kinds of Problems Do you Typically See As The Organization Transforms to Agile / Lean |
| Blog "Why Hasn't Our Agile Implementation Lead to Cost Savings?" | Blog post | Worldwide | 2020-05-08 | HansSamios: How Do We Use Agile to Reduce Costs?; FiveWhyz: Why Hasn't Our Agile Implementation Lead to Cost Savings? |
| Systematizing Organizational Impediment Removal | Coaching | Worldwide | 2020-04-29 | Initial release to LACE; expected wider rollout |
| Value Stream Analysis for Lean Agile Center of Excellence | Coaching | Worldwide | 2020-04-16 | Improve LACE offerings |

| Event | Туре | Location | Date | Comments |
|--|----------|-----------|------------|--|
| Resiliency Analysis | Coaching | Worldwide | 2020-04-15 | Understand impact of reduction in contractors and working from home on effectiveness |
| Agile Mindset for Non-Agile Teams | Coaching | Worldwide | 2020-04-14 | Improve framing of DIY Agile implementation |
| Simple Customer Discovery Exercise | Coaching | Houston | 2020-04-02 | How to help Teams increase their ability to manage stakeholders |
| Virtual Open Space | Coaching | Worldwide | 2020-04-01 | Theme "You're the Coach Now" |
| Rework Transformation Initiatives (Multiple Events & Deliverables) | Coaching | Worldwide | 2020-03-09 | In the light of COVID-19 what needs to change wrt Agile Transformation |
| Portfolio Sync and Training | Coaching | Houston | 2020-02-19 | 3 day event aimed at working portfolio issues and learning |
| Multi-Organizational Kaizen Event | Coaching | Houston | 2020-02-10 | Step back from Day-to-day to develop multiple experiments aimed at improvement |
| Enterprise Project Management Office Virtual Training | Coaching | Worldwide | 2020-01-28 | Engaging Agile Programs and Teams |
| Enterprise Business Agility Strategist | Learn | Dallas | 2020-01-23 | With EBAS Certification from icAgile |

| Event | Туре | Location | Date | Comments |
|--|-----------------------|----------|------------|---|
| Driving the Flow of Value | Coaching, Training | Houston | 2019-12-17 | Workshop looking at how we define value and how we deliver value quickly |
| Cross-organization Value Stream Analysis | Coaching | Houston | 2019-12-02 | Work to improve the flow of value that touches to organizations without an restructuring |
| SenseMaking Workshop | Coaching, Training | Houston | 2010 11 11 | Excellent workshop lead by Dan Walsh (FiveWhyz). A better way to understand if your culture is improving. |
| Five Dysfunctions Workshop with Leadership | Coaching | Houston | 2019-11-07 | Improving teamwork of leadership group |

| Event | Туре | Location | Date | Comments |
|---|----------------------------|-------------------|------------|--|
| Project Simulation Training | Training, Participating | Houston | 2019-11-05 | Projects community training to understand changes in approach as a result of agile |
| Introduce OKRs to Portfolio Management process | Coaching | Houston | 2019-10-28 | Experiment to add OKRs into existing LPM process in time for 2020 to improve organizational alignment |
| Agile Assessment | Learning | Washington, DC | 2019-10-21 | Assessment to understand current state of thinking, and provide recommendations for change |
| Business Agility Workshop | Coaching | Houston | 2019-10-07 | Direct business request to help them become more Agile |
| SAFe Summit | Attend | San Diego | 2019-10-02 | Learning opportunity. SAFe v5 released |
| Update Business Metrics for FI | Coaching | Worldwide | 2019-09-05 | Base metrics that were agreed to previously need to be updated to reflect current thinking |
| Blog "So You Want Set Up a Business as an Agile Coach?" | Blog Post | Worldwide | 2019-09-01 | 12 part series on the steps you should take to set up an Agile business. HansSamios: So You Want Set Up a Business as an Agile Coach?; FiveWhyz: So You Want Set Up a Business as an Agile Coach?. |
| FI Team Churn Analysis | Coaching | Worldwide | 2019-08-28 | What happens to Team performance when Teams have turnover (churn) in their people? |
| Kick-off Coaches Craft CoP | Coaching | Worldwide | 2019-08-20 | Beyond Foundation Infrastructure group |
| Quarterly Alignment Session | Coaching, Participating | Houston | 2019-08-13 | Included retrospective, and introduction to OKRs |
| Projects Team Enablement | Coaching | Houston | 2019-07-24 | Response to survey. "Drain the glass" session |
| Blog "Why Do People Overcommit?" | Blog Post | Worldwide | 2019-07-08 | HansSamios: Why Do People Overcommit?; FiveWhyz: Why Do People Overcommit? |
| PI Planning | Coaching | Buenos Ares | 2019-06-26 | Service group. SAFe event. |
| Portfolio Synchronization Session | Coaching | Houston | 2019-06-12 | Multi-day alignment session |
| "Drain the Glass" session for new Transformation | Coaching | Houston | 2019-06-10 | Setup session to work pent up resentments |
| "Leveraging Agile Thinking for Sustainability" | Coaching | Dallas | 2019-06-03 | Session for Sustainability Leadership Forum. |
| Cynefin Practice Foundations | Learning, Supporting | Houston | 2019-05-30 | Excellent workshop lead by Dan Walsh (FiveWhyz) |

| Event | Туре | Location | Date | Comments |
|--|------------------------|-----------|------------|--|
| Blog "I have opportunity to learn so much when you are on vacation." | Blog Post | Worldwide | 2019-09-01 | FiveWhyz: I have opportunity to learn so much when you are on vacation. |
| Coaching Team Face to Face | Coaching | Houston | 2019-05-07 | Coaching team for FI working on the plan for sustainment model for the organization |
| FI Quarterly LPM Face to Face | Coaching | Houston | 2019-04-30 | Portfolio prioritization and learning (outcome vs output). Full suite of Product Managers, Release Train Engineers in the room. All (22 FI) coaches in the room to understand how these meetings work |
| FI Product Manager Orientation | Coaching | Houston | 2019-04-29 | Orient Product Managers to LPM and leverage opportunity to do some roles and responsibilities |
| Architect Orientation Workshop | Coaching / Training | Houston | 2019-04-26 | 2 X sessions to help Architects get situated in their new role. Based on SAFe and discussion at How Does The Role of Architect Change in Agile? |
| FI Projects Team Enablement envisioning / planning | Coaching | Houston | 2019-04-26 | Develop base plan for this transformation |
| Initial PI Planning (Big Room) for Data Center Compute Product | Coaching | Houston | 2019-04-24 | Big room Planning event for large Train. SAFe event. |
| Initial PI Planning (Big Room) for Branch Product | Coaching | Houston | 2019-04-24 | Big room Planning event for large Train. SAFe event. |
| Sense-making Experiment | Learning | Houston | 2019-04-11 | Learning about different approach to gathering data from a complex system. Cool. |
| Staff Development Guardrails Session | Coaching | Worldwide | 2019-04-03 | Session for newly formed staff development group to discuss developments we are seeing, and offer opportunity to address issues seen by our managers. |
| Employee motivation Webinar | Learning | Online | 2019-03-14 | Online seminar. My notes are at "You Can Enhance Employee Motivation in 10 Minutes by Friday" - Gregg Lederman |

| Event | Туре | Location | Date | Comments |
|---|-----------------------|-----------|------------|---|
| Staff Development Manager workshop | Coaching | Houston | 2018-12-10 | Kick-off meeting for 3 teams (Houston, BA, KL) of Staff Development Managers |
| Lean Portfolio Management Meeting | Coaching | Houston | 2018-11-06 | Initial LPM meeting working complete portfolio Kanban and impediments. SAFe event |
| Leading SAFe | Coaching, Training | Houston | 2018-10-02 | 14 people. SAFe event |
| PI Planning | Coaching | Houston | 2018-08-22 | Fuels and Lubes Train. 8 Teams. 70 people at event. SAFe event. |
| Value Stream Analysis | Coaching | Houston | 2018-07-13 | For Branch and Shared Services leading to Train design. SAFe event |
| Staff Development Manager workshop | Coaching | Houston | 2018-07-07 | Workshop aimed at on-boarding new organizational role of "development manager". Initial "team" workshop. |
| Leadership Workshop | Coaching | Houston | 2018-07-06 | Workshop aimed at helping top level supervisors align on direction. Next step in setting up portfolio, realign leadership on decisions (new members of the leadership team), alignment with McCrystal Strategic Alignment Framework (SAF) and Decison Space (we drove through Delegation Poker) |
| Portfolio Prioritization | Coaching | Houston | 2018-06-19 | Initial meeting to get "to do", "in progress", "done" columns in place. Main aim was to determine "what should we stop" as we needed to reduce some level of organizational WIP. See How Do I Facilitate a Prioritization Meeting for more information |
| Value Stream Analysis | Coaching | Houston | 2018-06-11 | For Data Center Compute leading to Train design. SAFe event |
| Portfolio Kanban workshop | Coaching | Houston | 2018-05-23 | Initial analysis of Foundation Infrastructure work (backlog, WIP) on the way to Portfolio Kanban. |
| Team Kick-off | Coaching | Worldwide | 2018-05-21 | Team kickoff for Gateway Train. 11 teams. SAFe event |
| PI Planning | Coaching | Houston | 2018-04-17 | Star Train (Network Core). 6 Teams. 90 people at event. SAFe event. |
| Value Stream Analysis | Coaching | Houston | 2018-04-02 | For Gateway Products leading to Train design. SAFe event. |
| DevOps for Agile | Attend | Dallas | 2018-03-08 | DevOps for the Agile Enterprise devops_for_agile.pdf |

| Event | Туре | Location | Date | Comments |
|------------------------|----------|----------|------------|--|
| Leadership Workshop | Coaching | Houston | 2018-03-05 | Workshop aimed at helping top level supervisors align on direction |
| Product analysis | Coaching | Houston | 2018-01-23 | Round 2 |
| Product analysis | Coaching | Houston | 2018-01-23 | Get architects into a room to determine product strategy for Infrastructure as a lead in to value stream mapping |
| PI Planning | Coaching | Houston | 2018-01-15 | Crazy (AtC). 5 Teams. 100 people at event. SAFe event. |

| Event | Туре | Location | Date | Comments |
|----------------------|----------|--|------------|--|
| Leadership Workshop | Coaching | Houston | 2017-11-28 | Workshop aimed at helping top level supervisors understand what they need to know and do to drive the transformation |
| Value Stream Mapping | Coaching | Houston | 2017-10-25 | Value Stream mapping for Foundation Infrastructure group |
| Initial PI Planning | Coaching | Houston | 2017-10-23 | Crazy (AtC). 5 Teams. 100 people at event. SAFe event. |
| Leading SAFe | Training | Houston | 2017-10-19 | Leadership of the XOM FI AtC Train plus guests. 32 people. |
| SAFe for Teams | Training | Houston | 2017-10-16 | AtC (Crazy) Train. 42 people. |
| Kanban Team Kickoff | Training | Budapest | 2017-10-09 | New teams on the way to Agile Release Train |
| Initial PI Planning | Coaching | Houston, Buenos Ares, Kuala Lumpur | 2017-10-02 | Bullet (Storage). 3 Teams. Initial XOM Foundation Infastructure (FI) Train. SAFe event. |
| SAFe for Teams | Training | Houston | 2017-09-25 | Half the Storage (Bullet) Train. 24 people. New SAFe 4.5 materials. |
| Kanban Team Kickoff | Training | Houston / Buenos Aires | 2017-09-12 | 2 new teams on the way to Agile Release Train |
| Leading SAFe | Training | Houston | 2017-08-21 | Leadership of the XOM FI Storage Train. 10 people. New SAFe 4.5 "Leading SAFe" materials. |

| Event | Туре | Location | Date | Comments |
|--|-------------------------|-----------------------|------------|---|
| Kanban Team Kickoff | Training | Houston | 2017-07-24 | 2 new teams on the way to Agile Release Train |
| SAFe 4.5 Update | Attend | Virtual | 2017-06-27 | Understand updates for SAFe 4.5 (see summary at 5 Reasons to Update and My Notes) |
| Enterprise Lean-Agile Coach Course with OrgMindset.com | Attend | Boulder | 2017-06-07 | 3 day course with Alex Yakyma. See My Notes. Passed test and certified as Enterprise Coach - |
| Value Stream Mapping and Lean Coffee | Training | Houston | 2017-05-08 | Train the trainer session. Facilitated |
| Leaders Introduction to Agile | Training | Houston | 2017-05-01 | Three sessions aimed at helping leadership understand how the pilots work, and understand what learning they will need. |
| Kanban Team Kickoff | Training | Kuala Lumpur | 2017-04-17 | 3 Teams. Co-taught |
| Kanban Team Kickoff | Training | Houston | 2017-04-10 | 2 Teams. Co-taught. |
| Ongoing until 2017-12-31 | Transformation Coach | Houston | 2017-03-15 | Co-coach with Transformation Team |
| Implementing SAFe | Training / Coaching | Scottsdale | 2017-01-31 | Co-taught |
| SAFe Advanced Scrum Master Enablement | Certification | Virtual | 2017-01-27 | SASM |
| Difficulties and Benefits of Working in Agile Environment | Training | Belmont University | 2017-01-23 | 16 Seniors |

| Event | Туре | Location | Date | Comments |
|--------------------------------------|---------------|-----------|------------|--|
| Essential SAFe - Dean Leffingwell | Attend | Milwaukee | 2016-10-18 | My notes |
| SAFe v4 PI Planning | Coach | Madison | 2016-09-06 | Part of SAFe v4 ART; New Train (7 teams) |
| SAFe for Product Owners | Train / Coach | Madison | 2016-08-30 | Part of SAFe v4 ART; 7 new teams |
| SAFe for Scrum Masters | Train / Coach | Madison | 2016-08-30 | Part of SAFe v4 ART; 7 new teams |
| SAFe for Teams | Train / Coach | Madison | 2016-08-22 | Part of SAFe V4 ART |

| Event | Туре | Location | Date | Comments |
|---|---------------|----------|------------|---|
| Training Roadmap Workshop | Workshop | Madison | 2016-08-02 | Steps to identify inflight work to bring onto the SAFe train. |
| How to Work Personality Issues Without Sounding Like a Marriage Guidance Counsellor? | Train / Coach | Atlanta | 2015-07-27 | Ran 75 min workshop involving about 120 people. All new materials. |
| 2016 Agile Conference | Attend | Atlanta | 2015-07-25 | My notes |
| Ongoing until 2016-11-18 - Coach Program / New Train of 7 teams | Coach | Madison | 2016-07-18 | Part of SAFe v4 ART |
| Leading SAFe | Train / Coach | Madison | 2016-07-19 | Part of SAFe V4 ART |
| Coaching Instructor | Certification | Virtual | 2016-04-05 | Certification through ICAgile |
| Agile Project Manager (APM) | Certification | Virtual | 2016-04-25 | Certification through ICAgile |
| Ongoing until 2016-06-30 - Coach 4 teams | Coach | Madison | 2016-04-04 | Part of SAFe v4 ART |
| SAFe v4 PI Planning | Coach | Madison | 2016-04-18 | Part of SAFe v4 ART |
| VersionOne for Scrum Masters | Attend | Madison | 2016-04-14 | Part of consulting engagement - learning with customer selected tool |
| VersionOne for Product Owners | Attend | Madison | 2016-04-14 | Part of consulting engagement - learning with customer selected tool |
| VersionOne at Scale | Attend | Madison | 2016-04-13 | Part of consulting engagement - learning with customer selected tool |
| VersionOne Foundations | Attend | Madison | 2016-04-12 | Part of consulting engagement - learning with customer selected tool |
| SAFe for Product Owners | Coach | Madison | 2016-04-08 | Part of SAFe v4 ART |
| SAFe for Scrum Masters | Coach | Madison | 2016-04-07 | Part of SAFe v4 ART |
| SAFe for Teams | Coach | Madison | 2016-04-04 | Part of SAFe v4 ART |
| "Scrum at Scale" by Jeff Sutherland | Attend | Virtual | 2016-03-28 | Some good ideas on the role of leadership and management in a Scrum transformation. See My notes |
| Executive Scrum Team Kickoff | Coach | Gulfport | 2016-03-22 | Executive team kick-off. Start with understanding goal, obstacles, metrics and personnel. Then work through creation of team, backlog, and so on to drive implementation. |
| "Scrum Master or Arm- chair Psychologist" by Angela Johnson | Attend | Virtual | 2016-03-14 | Simple presentation about the Scrum Master focussing on the coaching, not just facilitating or being a secretary. See My notes |
| Project Improvement | Coach | Gulfport | 2016-03-08 | Improving specific election of project using Agile thinking |

| Event | Туре | Location | Date | Comments |
|---|---------------|----------|------------|---|
| Second Generation Lean Product Development | Attend | Virtual | 2016-03-05 | If you want to understand impacts of things like queuing theory, lean, and why variability should be preserved for new product development then this is the video for you. See My notes |
| SAFe ART PI Planing | Coach | Boston | 2016-02-23 | PI Planning for 2 new ARTs involving 250 people including teams and executive management. Part of a SAFe (Version 4 - the first one?) implementation. |
| Agile Enablement | Training | Virtual | 2016-02-21 | Train 9 people, located in Vietnam, in basics. Remote presentation with exercises. Part of a SAFe implementation. |
| Team Coaching | Coach | Virtual | 2016-02-09 | Work through issues on improving planning such as estimation, capacity planning, dealing with interruptions, etc. Part of a SAFe implementation. |
| Large-scale Agile at Ericsson | Attend | Virtual | 2016-02-04 | Experience report through the Scrum Alliance and the Learning Consortium. My notes |
| Agile Boot Camp | Train / Coach | Kirkland | 2016-01-25 | Train 55 people, but quickly turned into a bespoke course aimed at "what's next?" |
| Scrum Team Launch | Training | Atlanta | 2016-01-18 | Train 60 people, then kick off 6 teams over 4 days. Part of a SAFe implementation. |
| Agile Boot Camp | Train / Coach | Gulfport | 2016-01-11 | Train pilot team plus 2 days of executive coaching. |

| Event | Туре | Location | Date | Comments |
|---------------------------------|---------------|----------|------------|---|
| SAFe Program Consultant v4.0 | Certification | Virtual | 2015-12-28 | SPC4 |
| Effective Testing (QA) | Certification | Virtual | 2015-12-21 | Certification through ICAgile |
| Business Analyst (BA) | Certification | Virtual | 2015-12-17 | Certification through ICAgile |
| Agile Requirements | Train | Virtual | 2015-12-14 | 14 PDUs, 14 CDUs |
| Agile for Construction | Train | Denver | 2015-12-10 | 75 people. Training / Adapting / Coaching |

| Event | Туре | Location | Date | Comments |
|----------------------------------|---------------|----------------|------------|---|
| Agile Boot Camp | Training | Charlotte | 2015-12-07 | 20 people. Training. 21 PDUs |
| Product Owner Training | Train / Coach | Norman | 2015-12-03 | 18 people. Started as standard training but client turned into bespoke course aimed at "what's next". 14 PDUs |
| Agile Boot Camp | Train | Bentonville | 2015-11-30 | 17 people. Training. 21 PDUs |
| Team / organization onsite | Coach | Boise | 2015-11-09 | Help get team kick started, work organizational issues |
| Team / organization onsite | Coach | Boise | 2015-11-02 | Help get team kick started, work organizational issues |
| General Certification | Certification | Virtual | 2015-10-27 | Certification through ICAgile |
| Team Kickoff | Train | Boise | 2015-10-26 | 11 people. Training / setup |
| Agile Boot Camp | Train / Coach | Bentonville | 2015-10-20 | 23 people. Training and coaching. 21 PDUs |
| Team Kickoff | Train | Des Moines | 2015-10-13 | 20 people. Training and coaching |
| Initial review / goals set | Assessment | Des Moines | 2015-10-06 | Meet with leadership team to determine goals |
| Introduction to Scrum | Workshop | Sioux Falls | 2015-09-29 | 105 people in room. 7 PDUs, 8 CPEs |
| PO Training | Workshop | Hartford | 2015-09-24 | Small group focussed on "big data" application. 14 PDUs |
| Scrum / Agile Lunch and Learn | Workshop | Huntsville | 2015-09-21 | Focussed Agile event |
| SAFe Program Consultant | Attend | Cincinnati | 2015-09-14 | Training with Icon |
| Agile Introduction | Train | Virtual | 2015-09-10 | 7 PDUs, 8 CPEs |
| Agile Testing | Workshop | Virtual | 2015-08-27 | Focussed Agile event. A view of testing philosophy / approach |
| Making Scrum Work (Level 2) | Workshop | Huntsville | 2015-08-25 | Huntug users meeting - see materials |
| Agile Requirements | Train | Virtual | 2015-08-24 | 14 PDUs, 14 CDUs |
| Scrum at Scale Webinar | Attend | Virtual | 2015-08-19 | My notes |
| 2015 Agile Conference | Attend | Washington | 2015-08-03 | My notes |
| 1/2 Day Agile Scrum Refresher | Train | Huntsville | 2015-06-08 | Updated materials |
| 2015 Scrum Gathering Debrief | Present | Worldwide | 2015-06-06 | |
| Agile Alliance Virtual Conf. | Attend | Online | 2015-05-15 | |
| 2015 Scrum Gathering | Attend | Phoenix | 2015-05-04 | My notes |
| External Organization Kickoff | Train Coach | Belo Horizonte | 2015-04-27 | 4 teams, new Agile |
| Improved Forecasting and Risk | Train | Worldwide | 2015-04-22 | Monte Carlo / #noestimates |
| Confluence 5.7 Upgrade | Train | Worldwide | 2015-04-09 | |
| Marketing team(s) | Train | Atlanta | 2015-03-31 | Adapt Scrum / Agile |
| Internal Conference | Organize | Huntsville | 2015-03-18 | Peer "Scrum" conference |

| Event | Туре | Location | Date | Comments |
|------------|-------|------------|------------|---------------------|
| IT team(s) | Train | Huntsville | 2015-02-02 | Adapt Scrum / Agile |

2014 Completed (and Selected) Events

| Event | Туре | Location | Date | Comments |
|-----------------------------|-------------|-------------|------------|---|
| Lunch and learn | Organize | Huntsville | 2014-12-22 | Clean code practices |
| Development Process Refresh | Train | Worldwide | 2014-11-18 | Prepare for ISO audit |
| Engineer IT Meetings | PO | Hyderabad | 2014-10-15 | Meet new team |
| Agile Testing | Workshop | Hyderabad | 2014-10-14 | |
| Scrum Master Workshop | Train Coach | Hyderabad | 2014-10-13 | |
| Agile Testing | Workshop | Columbia | 2014-09-23 | |
| New team training (3 teams) | Train Coach | Columbia | 2014-09-22 | |
| Atlassian Summit | Attend | San Jose | 2014-09-09 | JIRA, Confluence, HipChat, Service Desk |
| Agile 2014 De-brief | Present | Worldwide | 2014-09-03 | Also presented at the Conference |
| Agile 2014 Conference | Present | Orlando | 2014-07-28 | See materials |
| Unit Testing for SM / PO | Coach | Worldwide | 2014-07-24 | Results of survey plus practice review |
| IMPACT Training | Train Coach | Huntsville | 2014-07-07 | Agile thinking for new hires |
| UX Kick-off | Train Coach | Worldwide | 2014-07-01 | Scrum for UX as well as team integration |
| Scrum Team Kickoff | Train Coach | Switzerland | 2014-06-23 | Two new teams - software embedded hardware |
| Aggressive Backlog Triage | Coach | Worldwide | 2014-06-03 | See materials |
| PO Training | Train Coach | Huntsville | 2014-05-13 | |
| Product Backlog Refinement | Train Coach | Worldwide | 2014-04-25 | Special session for POs |
| Advanced PO / SM Materials | Train Coach | Lodz | 2014-02-12 | Systems thinking, Uber-Scrum, facilitation, etc |
| Scrum Team Kickoff | Train | Lodz | 2014-02-10 | New team |
| Scrum Team Kickoff | Train | Norcross | 2014-01-08 | Adapted for technical writer team |

2013 Completed (and Selected) Events

Filter:

| Event | Туре | Location | Date | Comments |
|-------------------------------|-------------|------------|------------|--|
| Advanced PO / SM Materials | Train Coach | | 2013-12-13 | lacilitation, etc |
| Advanced PO / SM Materials | Train Coach | Norcorss | 2013-12-10 | Systems thinking, Auber-Scrum, facilitation, etc |
| Scrum Master course | Train Coach | Huntsville | 2013-10-10 | How to be a great Scrum Master |
| Advanced PO / SM Materials | Train Coach | Hyderabad | 2013-09-23 | Systems thinking, Auber-Scrum, facilitation, etc |
| Scrum Team Kickoff | Train Coach | Scottsdale | 2013-07-30 | 4 new teams |
| IMPACT Training | Train Coach | Huntsville | 2013-07-11 | Agile thinking for new hires |
| Scrum Team Kickoff | Train | Huntsville | 2013-04-16 | Adapted for product support team |
| Scrum Master course | Train Coach | Columbia | 2013-04-08 | How to be a great Scrum Master |

Prior

And so on, and so on ... Back to 2007.

Consultant, Events, Workshops

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