



# Agile Education Program Case Study Requirements

## The Why

The mission of the Scrum Inc. Agile Education Program™ is to spread good Scrum across the world, and to leave a lasting, positive impact. Our trainers have a proven track record of helping teams and organizations improve their performance and achieve lasting results. To demonstrate this, Registered Scrum Trainer applicants must submit a case study from their own experience implementing Scrum.

Case studies must include concrete metrics that demonstrate the impact of actions taken and should document an experience from within the last 2 years.

The purpose of these case studies is to help others think differently about their own situation. This needs to be concise as it gives clear insight on the roots of a problem and an experiment to address the problem, including data by which to measure the success of the experiment.

## Accepted Formats

- Video recording and an accompanying slideshow
- Write-up (3-5 pages with data visualization and formatted for publication)
- Podcast (including a proposed outline for an episode on Scrum Inc.'s Unlocking Agile Podcast)

## General Requirements for All Formats

- Assume an average of 2-3 rounds of feedback before a case study is considered final and ready to hand off to the Scrum Inc. team
- Case studies by Registered Scrum Trainers must cover a Scrum implementation or elements of scaling Scrum in their case studies<sup>1</sup>
- Case studies by Registered Scum@Scale Trainers must include elements of scaling Scrum in their case studies
  - Recommend aligning scaling elements to S@S framework
    - Example: if you implemented team of teams, tie into “Scrum of Scrums” terminology so we remain familiar to our audience

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<sup>1</sup> Topic list can be found here: <https://bit.ly/3ABrq7Z>

- Anonymize references to other credentialing programs and frameworks to maintain focus on patterns, techniques and results.
  - Example: if team went through Scrum Master training through another organization, don't use "certified/professional Scrum," just say they had Scrum Master training
- Follows a clear story arc<sup>2</sup>
  - Example format:
    - The issue and its root causes were X
    - We created X experiment to address the problem
    - We observed X when we intervened
    - From this experiment, we learned X
    - We collected X data
    - The next steps were X

## Context and History

- Size
  - Small = annual revenue between \$1M to \$40M and by employment from 1 to 1,500 employees
  - Medium = annual revenue between \$38.5M and \$1B and employment from 1,500 to 2,000 employees
  - Large = annual revenue exceeding \$1B and employment exceeding 2,000 employees
- Name (if possible; if you are under a strict NDA with the client you are reviewing in the case study and are unable to share their name/logo, we encourage you to anonymize all sensitive information; for example, instead of saying you worked with Bank of America, you can share that you worked in the financial services industry).
  - If you are under the NDA, we suggest you keep your narrative report focused on a process aspect of the case study. Consider addressing questions such as what worked from an agile standpoint and what didn't? What challenges did you face? How did you overcome them? What advice would you give another agilist going into a similar situation?
- Industry<sup>3</sup> and topics
- Current/before state of organization before your intervention
- Challenge to overcome or problem to solve

## Results

- Tangible data points that clearly highlight the impact of your team's actions; financial results are the most powerful to share (if available)

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<sup>2</sup> Refer to the case study one pager for an example story arc: <https://bit.ly/3dOdZbE>

<sup>3</sup> Industry list can be found here: <https://bit.ly/3QJZAvN>

- Here are some example metrics to consider including in your case study: velocity (increase in speed over time), delivery (time to market, adoption metrics), financial (think stock price, revenue growth, cost savings, increased profitability, etc.), quality (reduction in defects, reduction in time to fix defects, increase in customer satisfaction, etc.), time span for implementation (project lifecycle, time to market, etc.), value delivered, customer or employee satisfaction (NPS, etc.)
- Before/after metrics are ALWAYS best because they will enable you to demonstrate the impact of the actions you took in this engagement or initiative

## Video and Slideshow Requirements

### Delivery

- Be engaging: making eye contact with the audience (camera in virtual settings); practice using changes in tone/inflection to keep your audience engaged; speak clearly and directly.
- DO NOT simply read off the slides.
- Let your personality and unique presentation style shine through. This will be more memorable!
- Ensure that your speaking cadence is easily followed. Take short pauses when appropriate.
- Highlight top takeaways from your lessons learned. Don't leave your viewer confused as to what the punchline is.
- Acronyms and company/industry-specific jargon should be verbally defined (note: assume viewers are new to Scrum, especially for team-level case studies)

### Slides

- 3-5 slides average, maximum 10
- Branded with Agile Education Program logos (NOT Scrum Inc.) and colors<sup>4</sup>
- Slideshow includes appropriate date and name on the Master Slide<sup>5</sup>
- Open Sans or Verdana font
- Images and graphics over text. Slides with too much text will be rejected.
- Bullet points should help guide and supplement the story, not tell it for you.
- Be purposeful with images and graphics. If your visuals don't tell a clear story, remove them.
  - You can use animations but they need to be concise and add to the overall message of the case study.

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<sup>4</sup> Brand guidelines can be found here: <https://bit.ly/3PbUIDE>

<sup>5</sup> On the bottom of the slide template, you will see "Case Study By: YOUR NAME" which can be changed and updated with your name via the Master Slide view in PowerPoint

## Podcast Requirements

- 10 minute timebox (12 minute maximum for first drafts)
- Must be an audio recording (.mp3) file
- The presentation must include enough context to stand alone without supplemental visual material, though you may optionally include supplemental visual content in a downloadable format (.pdf, .jpg, .png).
- The audio recording should include a detailed description of the context in which the engagement occurred, including but not limited to: the industry, size of the organization, scope of the implementation (i.e., number of teams), key reasons for implementing Scrum, challenges, and successes of the implementation, and concrete data that demonstrates the impact. The submission should be production-ready and in a publishable state.

## Write-Up Requirements

- 3-5 page write-up documenting your experience<sup>6</sup>. The submission should be copy-edited and in a publishable state.
- The write up should include a detailed description of the context in which the engagement occurred, including but not limited to: the industry, size of the organization, scope of the implementation (i.e., number of teams), key reasons for implementing Scrum, challenges, and successes of the implementation, and concrete data that demonstrates the impact.

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<sup>6</sup> Paper case study template can be found here: <https://bit.ly/3QAeS5J>