

Agile for Project Managers

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Contents

Acknowledgments	xv
About the Author.....	xvii
Introduction.....	xix

Chapter 1 What Exactly Is Agile?.....	1
Agile Is Faster.....	2
Agile Changes Are Inherent	2
Agile Is Value-Focused	3
Agile Is Risk-Focused.....	4
Agile Methods Support the Delivery of High-Quality Products	4
Agile Manifesto	4
Traditional Project Management	5
Moving to Agile.....	6
Chapter Summary	6

Chapter 2 Agile Concepts	9
Agile Values.....	9
Recap	11
Agile Guiding Principles	11
Declaration of Interdependence	16
Chapter Summary	18

Chapter 3 The Most Popular Agile Methods.....	19
Scrum Overview	22
Scrum Transparency	23
Adaptation	24
Inspection	27
Iterative and Incremental Development.....	28
Time-Boxing.....	28
Collaboration	28
Self-Organization	29

Scrum Management and Leadership Styles	29
Scrum Roles and Responsibilities	29
Product Owner	30
ScrumMaster	30
Scrum Team	31
Scrum Planning	31
Sprints	31
Core Values of Scrum	32
Sprint Artifacts (Deliverables)	33
Product Vision	33
Prioritized Product Backlog	33
Sprint Goal	33
Sprint Backlog	33
Blocks List	34
Sprint (Product) Increment	34
Sprint Burndown Chart	34
Scrum Board	35
Recap of Scrum	35
Extreme Programming (XP) Overview	35
XP Core Values	36
XP Roles and Responsibilities	37
Customer	37
Developer	37
Tracker	37
Coach	38
XP Core Practices	38
Recap of XP	40
Chapter Summary	41
Chapter 4 Agile Tools	43
Agile Project Management Tools	43
Tools Review and Analysis Process	44
Agile Automated Tools	47
Build Automation Tools	48
Cameras	49
Collaboration Tools	49
Task Boards	50
Chapter Summary	50

Chapter 5	Agile Stakeholder Engagement.....	51
	Traditional Stakeholder Management.....	51
	Agile Stakeholder Management Concepts.....	53
	The Right People	53
	Stakeholder Management	53
	Vendor Management.....	54
	Ensuring Stakeholder Engagement	55
	Stakeholder Tools and Techniques.....	56
	Agile Modeling.....	57
	Personas	57
	Website Wireframe.....	57
	User Stories.....	58
	Stakeholder Communications Management	58
	Information Displays	59
	Chapter Summary	59
 Chapter 6	 Agile Documentation?	 61
	Agile Documentation Best Practices	61
	Selecting What to Document.....	61
	Stable Information.....	63
	Simple Documentation	63
	Minimal Document Overlap	63
	Proper Place for Documents	63
	Publicly Displayed Information.....	64
	Create Documentation with a Purpose	64
	Focus on Customer Needs.....	64
	Let the Customer Determine Document Value	65
	Iterative Documentation.....	66
	Better Ways to Communicate.....	66
	Current Documents	66
	When to Update Documents	66
	Documentation Requirements.....	67
	Require Justification for Documentation	67
	Required Documentation	67
	Writing Experience Required	68
	Chapter Summary	68

Chapter 7	Agile Tracking and Reporting.....	69
	Earned Value on Agile Projects.....	71
	Cumulative Flow Diagrams	74
	Work in Progress (WIP).....	74
	Chapter Summary	75
Chapter 8	Agile Project Management Process.....	77
	Agile Project Management.....	77
	Project Feasibility	77
	Create Business Case	78
	Project Vision	79
	Agile Project Initiation	80
	Create Agile Charter	80
	Assign Project Staff.....	82
	Develop Project Backlog.....	83
	Create Estimates	83
	Affinity Estimation	83
	Cost Estimation	87
	Develop Road Map with Story Mapping.....	88
	Plan Release.....	89
	Breakdown Epics	89
	Estimate Stories with Poker Planning	90
	Create Release Plan.....	91
	Iteration 0	91
	Architectural Spikes.....	92
	Prepare for Iteration 1 during Iteration 0.....	93
	Iteration Planning 1– <i>N</i> (Where <i>N</i> Is the Total Number of Iterations in a Release).....	94
	Iteration R.....	95
	Coding.....	95
	Execute Acceptance Tests.....	96
	Create Test Cases	97
	Execute Automated Testing	97
	Definition of “Done”	97
	Answer Client’s Questions for Sign-Off	98
	Prepare Stories for Next Iteration.....	98
	Daily Standup Meeting	99

Update Burndown/Burnup Charts	99
Iteration Retrospective.....	99
Close-Out Actions.....	101
Chapter Summary	101
Chapter 9 Agile Value.....	103
Calculating Value	103
Plan Value.....	104
Adaptability and Value.....	104
Adaptive Planning.....	104
Agile versus Traditional Changes.....	105
Minimally Marketable Features	105
Tailoring and Value	105
Deliver Value.....	106
Using Software or Task Boards to Deliver Value	107
Analyzing and Determining Value.....	107
Value Prioritization.....	108
Confirm Value	109
Track and Report Value.....	110
Chapter Summary	110
Chapter 10 Agile Risk Management.....	111
Mitigating Risks with Agile Methods	116
Risk Management for Agile versus Traditional Project Management.....	116
Chapter Summary	117
Chapter 11 Agile People Skills.....	119
Listening	119
Negotiating.....	120
Addressing and Resolving Conflict	120
Utilizing Emotional Intelligence.....	121
Conducting Effective Meetings	122
Embracing Diversity	123
Leading and Managing Effectively	123
Adaptive Leadership.....	125
Servant Leadership	125

Embodying the PMI Code of Ethics	127
Chapter Summary	128
Chapter 12 Agile Teams	129
Agile Team Characteristics	130
Agile Team Magic.....	131
Collaboration	132
Collaborative Agile Games.....	133
Communication.....	134
Commitment.....	135
Agile Team Size.....	135
Motivating the Agile Team	135
Aligning the Agile Team	136
Coaching the Agile Team.....	137
Problem Resolution.....	137
Problem Detection	138
Cycle Time	138
Quality.....	139
V & V	139
Continuous Integration	140
Problem Solving.....	140
Chapter Summary	141
Chapter 13 Agile Certifications.....	143
Project Management Institute Agile Certified Practitioner (PMI-ACP).....	143
Scrum Alliance Certified ScrumMaster (CSM).....	144
Scrum Alliance Certified Scrum Coach (CSC).....	146
Scrum Alliance Certified Scrum Product Owner (CSPO)	147
Scrum Alliance Certified Scrum Developer (CSD)	147
Scrum Alliance Certified Scrum Professional (CSP)	148
Scrum Alliance Certified Scrum Trainer (CST)	149
SCRUMstudy Scrum Developer Certified (SDC)	150
SCRUMstudy ScrumMaster Certified (SMC)	150
SCRUMstudy Agile Expert Certified (AEC)	151
SCRUMstudy Scrum Product Owner Certified (SPOC) ...	151
SCRUMstudy Expert ScrumMaster (ESM)	152

SCRUMstudy Certified Trainer (SCT).....	152
Chapter Summary	153
Chapter 14 Agile Contracts.....	155
Story Point Billing Model.....	156
Money for Nothing and Change for Free.....	158
Fixed Price Contracts.....	160
Chapter Summary	161
Chapter 15 Which Projects Should Be Agile?.....	163
Agile versus Waterfall	163
Agile Not a Fit	166
Agile Fit or Misfit?	168
Limitations of Agile Software Processes	170
Agile Challenges	172
Is Agile Suitable?.....	174
Agile Suitability Construct.....	174
Agile Implementation: Risks and Issues	176
Agile Adoption Decision Model	176
WAINGE Model.....	179
Attitude Value toward Agile (AVA).....	179
Risk Factors for Agile Adoption	179
Mitigation Amplification Factor (MAF)	179
Final Decisional Value	180
Chapter Summary	180
Chapter 16 Agile Change Management	181
Agile Change Management Process	181
Reasons That Requirements Change.....	182
Importance of Agile Change Management.....	182
Nonstop Risk Management.....	185
Chapter Summary	185
Chapter 17 Additional Agile Methods	187
Dynamic Systems Development Method (DSDM).....	187
Crystal Methods	189

Agile Modeling (AM)	189
Lean Development.....	191
Adaptive Software Development (ASD).....	192
Kanban.....	193
Just-In-Time (JIT).....	194
Rapid Product Development (RPD).....	194
Feature-Driven Development (FDD).....	196
Future Implications for Agile Methods.....	196
Project Management	197
Software Development Life Cycles.....	197
Abstract Principles versus Concrete Guidance.....	198
Universally Predefined versus Situation Appropriate	198
Empirical Support	198
Chapter Summary	198
 Chapter 18 Starting Your Agile Journey	201
Starting the Agile Journey as an Individual	201
Starting the Agile Journey as an Organization	202
Stop	202
Transform	202
Expand	203
Perfect.....	204
 References.....	205
Index.....	211

5

Agile Stakeholder Engagement

This chapter discusses the importance of stakeholder engagement on the agile project. This is an essential practice that ensures a successful product delivery. We concentrate on important concepts such as:

- Getting the right stakeholders for the project
- Cementing stakeholder involvement
- Managing the interests of stakeholders

The uniqueness of the agile project requires that stakeholders participate in demonstrations that show progress and product capabilities. This practice keeps the stakeholder engagement levels very high. In addition, stakeholders remain informed about the project status on a regular basis. In order to avoid surprises and unacceptable products, frequent discussions of what “done” looks like need to occur. In addition, discussions with regard to estimations and projections should occur so that stakeholders can make decisions from unbiased information.

TRADITIONAL STAKEHOLDER MANAGEMENT

The fifth edition of *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)*^{*} has only recently included project stakeholder management as a separate knowledge area within the traditional project management framework. This change was incorporated into the *PMBOK® Guide* in 2013. It is well known in the IT industry that proper stakeholder management is a critical element of successful project management.

^{*} PMI. (2013).

There are some who may wonder why the PMI made the decision to add project stakeholder management as an additional knowledge area in the *PMBOK® Guide*. According to the PMI, one reason for this particular change was to associate a higher level of importance to stakeholder management. Its prior inclusion under project communications management could have possibly made this knowledge area seem unintentionally insignificant. This change made by PMI has unquestionably put additional focus on project stakeholder management and illuminates its proper level of significance in the attainment of project success.

We now discuss traditional project management and make the appropriate comparisons to agile concepts. This is being done so that readers can better understand the differences during the application of either type of method. The PMI's stakeholder management knowledge area has been expanded to include four distinct processes as identified below.

1. *Identify Stakeholders*: The process is used to identify the people, groups, or entities that could have an impact, could be affected, or are affected by the project that is being undertaken (including being affected by a project decision, outcome, or activity). This identification process would also include a documented acknowledgment of the stakeholders' involvement, influence, and their power on the success of the project.
2. *Develop Stakeholder Management Plan*: This process develops the management level strategy to engage stakeholders appropriately throughout the project. This process includes an analysis of the stakeholders based on their needs and interest levels, and their potential impact on the success of the project.
3. *Manage Stakeholder Engagement*: This is the process of communicating and interacting with stakeholders in order to meet their expectations and needs so that adequate stakeholder engagement can be obtained throughout the project.
4. *Control Stakeholder Engagement*: This is the process of monitoring stakeholders and their project interactions so that the engagement strategy can be adjusted if needed.

Now that we have provided an overview of the rather newly created traditional project management stakeholder management knowledge area, we discuss agile stakeholder management. Once again, it is important that we engage project stakeholders because it is a requirement for

the attainment of project success regardless of what type of project is being undertaken.

AGILE STAKEHOLDER MANAGEMENT CONCEPTS*

We have established the importance of engaging stakeholders on projects in order to increase the likelihood of success; it is equally important to understand the need for the “right” stakeholders. This means there is a need for stakeholders who can make decisions so that the momentum can be maintained on the project.

The Right People

Agile projects must be able to maintain a sustainable pace so that when decisions have to be made there won't be any unnecessary delays. This is where the right stakeholders come into play. The agile stakeholder needs to be available, engaged, and able to contribute toward moving the project forward in the right direction when needed. Lengthy decision making, bureaucratic delays, or unmovable obstacles do not align very well in the agile realm. In situations such as these, the agile project manager should have more than one stakeholder who is willing and ready to make difficult decisions in a timely fashion. In many cases, the Product Owner or customer can take on the role of dealing with bureaucracy.

Stakeholder Management

How are stakeholders' interests managed on the agile project? Who has the responsibility for managing stakeholders' interests? We start with the easy question first. The Product Owner is likely the individual responsible for the actual management of the stakeholders on the agile project. In other cases, the agile project manager takes on this responsibility.

An excellent way to manage stakeholders on the agile project is to ensure that everyone is fully versed in agile principles, practices, and project methodologies. This may involve training or some informal way of ensuring that the benefits of agile project management are understood.

* Griffiths, M. (2012).

A ScrumMaster or agile coach is the perfect role to communicate these benefits to the team on a regular basis. Lack of understanding as to how the agile project is supposed to work can result in stakeholders feeling excluded or frustrated. Once a common understanding of agility is achieved and the foundation is established, fears and concerns should lessen. This stakeholder management milestone is expected to result in the interested parties becoming more engaged on the project.

A larger stakeholder management task that should be undertaken is addressing the concerns of the stakeholder groups. The fact that project decisions have the potential to affect individuals and groups requires that stakeholders be provided with the necessary information related to their particular interests. It is the hope of all stakeholders that the project that is being undertaken will affect their interests in a positive way. It is possible, however, that the project can affect some stakeholders in a negative fashion. In either case, stakeholders want to know the project's impact on their interests. The concerns of those potentially affected need to be addressed so that all stakeholder groups understand their position with regard to the project's results or decisions. Only through stakeholder engagement and management can the concerns of the groups be addressed.

Stakeholders are inclusive of customers, users, and the sponsor. This group of individuals regularly interacts with the Product Owner, development team, and agile leader to assist with the creation of the product. Recall that the customer is a person or an entire organization that procures the product, service, or result that is being created by the project. When agile is first introduced into an organization, it is important to align stakeholders' understanding of agile methods with the project's requirements. This should be done in order to overcome any potential knowledge gaps that might occur. Stakeholder values should be incorporated into the project's priorities and implementation. This really boils down to synching the project's priorities with stakeholders' priorities. An agile project should never engage in work that is not valued or supported by project stakeholders. We have discussed stakeholder groups and now clarify the types of groups that are typically found on agile projects. Table 5.1 represents a listing of the possible concerns that the groups may have.

Vendor Management

External stakeholders who provide products or services may potentially need agile education. If at all possible, agile vendors should be selected

TABLE 5.1

Stakeholder Groups and Types of Concerns

Stakeholder Group	Concerns
Users	Product features, value
Sponsors	Costs, schedule, risks
Agile project team	Agile methods uncertainty
Corporate officials	Change
Product owner	Gaining support
Vendors	Contracts

on agile projects. Vendors are evaluated based on how well they satisfy the contractual terms that have been agreed upon. Requirements on the agile project are expected to change rather frequently and, as a result, agile contracts have been created in response to this need. Chapter 14 covers agile contracts in greater detail. It is highly probable that vendors may require agile education prior to working in an agile environment. A cost-benefit analysis should be conducted in order to determine which vendors might require training. Any type of agile education provided should include agile values, practices, goals, and related benefits. This ensures that stakeholders are fully aware of why the project is being implemented with agile methods.

Ensuring Stakeholder Engagement

Stakeholders must remain engaged and committed throughout the entire project. Stakeholder involvement should be monitored so that there is proper visibility into the levels of engagement that are required. It should be understood that the customer, sponsor, and users of the product are the most important stakeholders on the agile project. We base this ranking on the agile principle that states: *“Our highest priority is to satisfy the customer through early and continuous delivery of valuable software.”*

It is important to understand that stakeholders may need incentives to remain faithfully engaged. Many stakeholders are extremely busy with additional projects and responsibilities. Recognizing the efforts and contributions of stakeholders is a sure way to keep involvement levels strong. Praise and admiration appeal to most and these techniques should be utilized as ways of showing appreciation.

Another way to keep stakeholders involved is to demonstrate a working product as a success factor. The agile principle, *“Working software is the*

primary measure of progress,” implies that the demonstration of working software is a measure of how much progress has been made. Stakeholders should be included in these working software demonstrations as a way to keep them involved. Progress is good for the morale of all stakeholders and it also shows that value is being delivered on a consistent basis.

Yet another way to keep stakeholders engaged is to involve them in the grooming and prioritization of the product’s backlog. The end result of this is that stakeholders are aware of what is going into the product and they have a voice as to the value that goes into the product. For full engagement of stakeholders, it is probably a good idea to include them in all of the project’s meetings so that there won’t be any surprises or situations where they are caught off guard or feel as if what they value has not been considered. During meetings, different stakeholder groups can be managed with a time-boxed approach. For example, if a meeting is 30 minutes in duration, agile methods require that the meeting is stopped at the end of the time-boxed period. This is a way to keep order and avoid chaos during meetings. Readers need to be mindful that it is very possible that some stakeholders may present themselves as “problems” and may actually be a hindrance to the project. This is where the ScrumMaster or agile project manager should exercise soft skills in order to understand the rationale behind these difficulties and determine a positive way to deal with these types of stakeholders. Stakeholder management requires the establishment of a process for the escalation of issues that warrant a higher level of authority to resolve. The agile project must remain obstacle free in order to reach its goals.

STAKEHOLDER TOOLS AND TECHNIQUES

Stakeholders must all have a similar level of understanding with regard to the project requirements. Miscommunication or misunderstandings need to be corrected as quickly as possible as there is no time to waste. The agile project is fast paced and progress must be realized rather rapidly. What this boils down to is the need for tools and technology to keep everyone moving in the right direction. We discuss several tools and techniques that can be used to support the attainment of a common understanding for all stakeholders.

Agile Modeling

Stakeholders need to be a part of agile modeling because of the meaningful discussions that take place during these sessions. Whiteboards are often used to display design models and provide the means for discussion of project issues, problems, and concerns. Use cases, data models, and screen mockups are created during agile software modeling events. The purpose of modeling is to assist with delivering value to the product and stakeholder input is extremely important to this process.

Personas

In order to align stakeholders' understanding of the project so that there are no gaps between what the customer asks for and to ensure that the development team understands what has been asked for, a persona can be used as a tool to uncover mismatches. This tool can be very useful in gaining consensus among stakeholders.

Simply put, a *persona* is a role that is taken on by an actor. Most of us are familiar with the term “actor.” The unified modeling language (UML) uses actors (i.e., a user or another system) to describe how users operate a system. The persona has a similar meaning and purpose. The persona is used to help stakeholders understand and clarify the characteristics of the users of the end product.

Website Wireframe

A website wireframe is a fancy term describing a technique used to define product functionality. These tools are used as a way to ensure that everyone has the same understanding of how the product will work. It must be made clear that wireframes are not used to show what the product will look like. Developers can use this type of tool to create a product prototype and obtain feedback. In any event, the purpose of wireframes is merely to gain clarification of what “done” means to the project team or to verify a particular technical approach. Although the name “wireframe” may sound complex, developers can use Microsoft PowerPoint and Visio to create these items. Simply put, wireframes have been referred to in the past as technical diagrams. The wireframe is a visual tool that stakeholders

can adjust and use to gain consensus on a product mockup. Team plans can also be validated with wireframes.

User Stories

User stories have the same meaning as requirements. This is just another term to describe the desired capabilities of the product. User stories represent the means to gain a common understanding of functionality among the stakeholders. In 2003, Bill Wake* originated the criteria that define the attributes of an effective user story as identified with the acronym INVEST:

- (I) Independent: User stories should not be designed to be dependent upon another user story.
- (N) Negotiable: User stories should be negotiable in terms of functionality and associated costs.
- (V) Valuable: User stories should always be associated with business value.
- (E) Estimatable: User stories should always be “estimatable” in terms of the time it takes to develop and the amount of costs involved.
- (S) Small: User stories should be small and easy to estimate within a time frame of between one half-day to a maximum of 10 days.
- (T) Testable: As with most requirements, user stories should always be testable.

Stakeholder Communications Management

According to the PMI (2013), project communications management is inclusive of all processes that ensure the timely and applicable planning, collection, creation, distribution, storage, retrieval, management, control, monitoring, and disposition of project information. For the agile project, and in contrast to traditional project management, the preferred method of communication is mainly face to face because this method has the capability of transferring the greatest amount of information in any given period of time. Feedback can be obtained almost instantaneously when communicating face to face. The fastest way is the best way for the agile project, however, we know that the agile project requires transparency and information needs to be displayed.

* Agile Alliance. (2014).

Information Displays

Agile project data need to be visible to the agile team and stakeholders at all times. We have previously discussed whiteboards during our discussion of Scrum and we now summarize this information for agile project management as a whole. The agile project needs visibility and display of the following types of information:

- Current iteration product features: The list of product features for the current iteration.
- Remaining product features: The remaining product features to be completed for the current iteration.
- Team velocity information: The amount of work that the development team can complete for an iteration.
- Defects: Discrepancies or errors that have been identified.
- Retrospective information: Lessons learned from the iteration.
- Risks: A list of uncertainties that have been uncovered.
- Burndown/Burnup Charts: These two charts show progress and determine when the project or a release should be completed. Burndown charts show the work that remains; Burnup Charts show what has been delivered.

CHAPTER SUMMARY

This concludes our discussion on the main focus areas regarding agile stakeholder management. Following is a summary of the important concepts discussed in this chapter:

- Face-to-face communication is the preferred way to communicate on the agile project.
- Velocity defines the work capacity of the team.
- Stakeholders must be engaged throughout the project in order to ensure a successful outcome.
- Stakeholders must be managed and their needs addressed.
- Agile contracts are different from those used in traditional project management.

- Stakeholder engagement activities should be visible.
- Project information should be visible to support transparency.

It is very important that stakeholders are engaged on the agile project. This will ensure that the agile team builds exactly what the customer expects. Stakeholder engagement is the way to ensure that the delivered product is of high quality and meets or exceeds expectations.