



AGILE

TRANSFORMATION

Building Lean High Performing Teams!™



Agile Planning & Metrics That Matter



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About Me

- Sally Elatta Sally@AgileTransformation.com
- President, Agile Transformation, Inc. www.AgileTransformation.com
- Leading Agile Transformation Coach, Trainer and Speaker
- Agile Portfolio Transformation Book (In the works!)
- Certified by PMI, ScrumAlliance, IBM, Microsoft, ICAgile
- Trained thousands and helped coach dozens of teams on Agile
- Agile Expert for PMI.org LEAD CoP



I am simply a transformer. Someone who is really passionate about transforming individuals, teams and organizations to doing what they do better. I believe in Servant Leadership as the way to lead change and create a culture of empowered collaborative high performing teams.

Workshop – Agile and EVM



From what you've learned so far, where do **YOU** think EVM and Agile intersect? Where do they not?

Agenda

Planning in an Agile Environment

Baselining Agile Projects

Agile EVM Reporting

Tracking Metrics that Matter

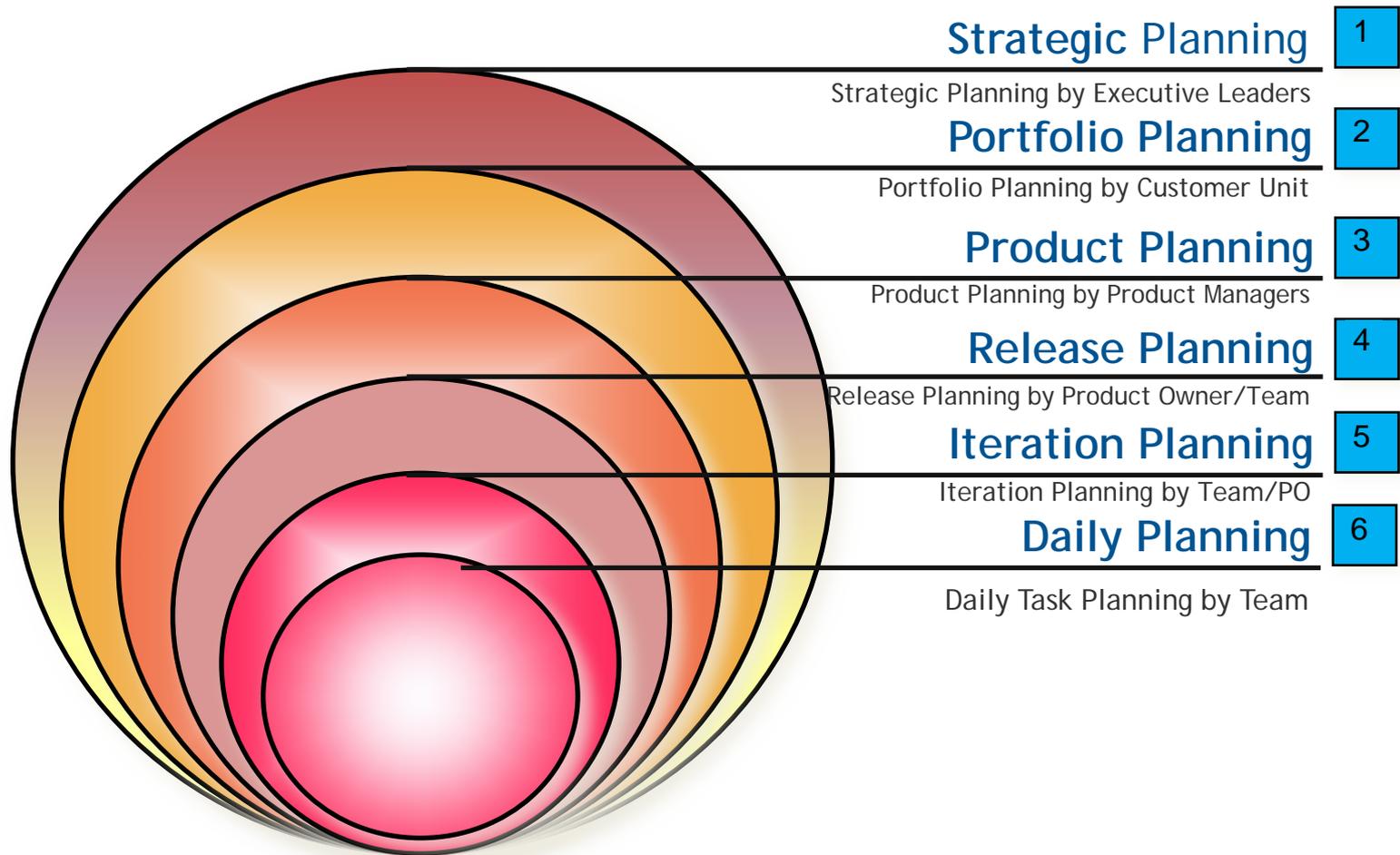
Agile Planning



“When preparing for battle, I find that **plans** are **useless**, but **planning** is **indispensable**”

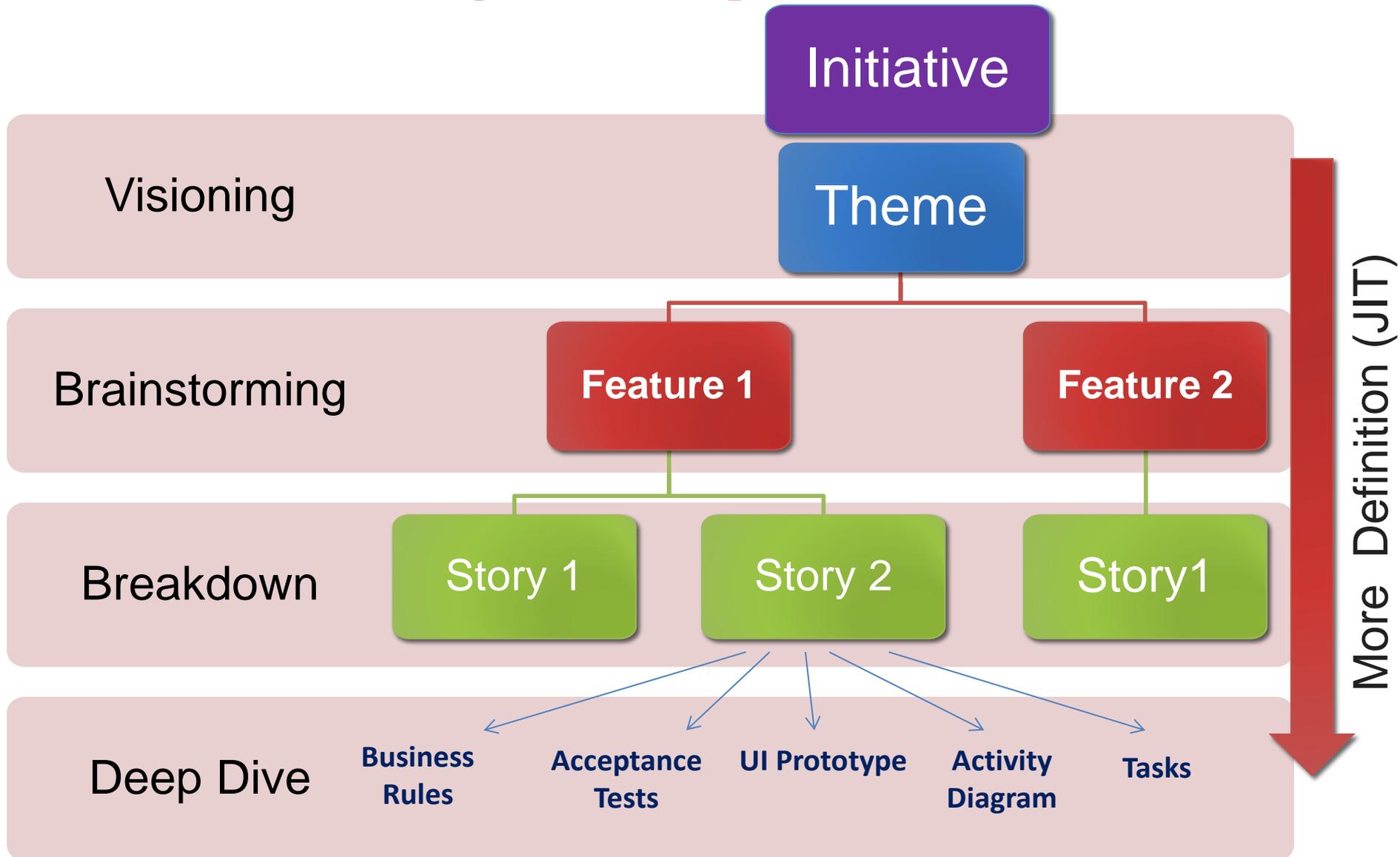
- Dwight D. Eisenhower

6 Planning Levels



The Team is Involved in Planning Steps 4,5,6

Levels of Agile Requirements



Example Backlog

Story	Story Points	Release #
Web Portal Site		
1 - Security		
1.1 As a Customer I want to login so I can access my account.	2	1
1.2 As a Customer I want to register for new online account so I can access my information	3	1
1.3 As a Customer I want to retrieve my forgotten password so I can login again	3	1
1.4 As a Customer I want to add a password hint so I can remember my password	2	2
2 - Profile Management		
2.1 As a Customer I want to add another user to my account so they have access to it	5	1
2.2 As a Customer I want to update my existing profile information so my information is accurate	2	1
3 - Place Order		
3.1 As a Customer I want to search the product list so I can find what I want	3	1
3.2 As a Customer I want to browse all products so I can see what is available	2	1
3.3 As a Customer I want to add a product to my cart so I can check out	5	1
3.4 As a Customer I want to complete my order so I can receive my product	8	1
* 3.5 As a Customer I want to view product reviews so I can make an informed decision	5	1
4 - Order Maintenance		
4.1 As a Customer I want to check the status of my order so I know when I will receive it	2	1
4.2 As a Customer I want to cancel my recent order so that I don't receive it or get charged	2	1
4.3 As a Customer I want to search order history so I can view previous orders	3	1
100 - Non Functional Stories		
100.1 Migrate customer data from legacy system to new oracle db	8	1
100.2 Develop High Level Architectural diagram for new system	2	1
100.3 Develop high level ERD and Logical database diagrams.	3	1
100.4 Develop High Level business process models	2	1
100.5 Design look and feel for site and high level site navigation prototype	3	1

The Agile Lifecycle

Initiation/ Feasibility

Is this project/idea worth doing?

- Project Vision, COS
- ROI Justification
- High Level Features
- High Level As-is To-be
- Alt Solution Analysis
- Identify Team, Skills
- Buy/Build/Vendor
- High level Cost
- Build Roadmap
- Create Initial Cost Estimates
- Obtain funding and support

Release Planning

Develop the release plan

- Develop Feature List/backlog
- Prioritize stories based on business value and dependency
- Estimate story points
- Develop initial release plan
- Update cost estimates

Iteration 0 (Setup)

Setup the foundation

- Setup environment (hardware, software, team area, etc.)
- High level architectural models
- High level business process models
- High level database models
- Look and feel and site navigation
- Team Training (Agile, Business Processes, Technical)

Execution Iterations

Deliver measurable value that is accepted by the Product Owner

- Planning Meeting
- Daily team standup
- Active business participation
- Automated Testing and TDD
- QA Testing
- User Acceptance Testing
- Pre-planning/ Backlog Grooming
- Code Design & Code Review
- Demo & Retrospective

Pre-Release

Prepare for Deployment

- Final System testing
- Final acceptance testing
- Finalize documentation
- Pilot test the release
- Train end users
- Train production staff
- Deploy system into production

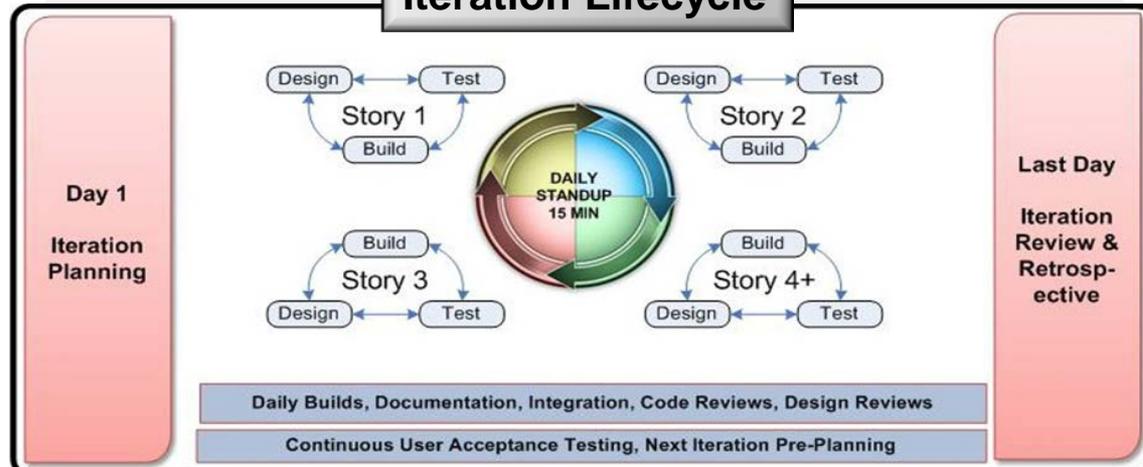
Production

Operate and Support Release N

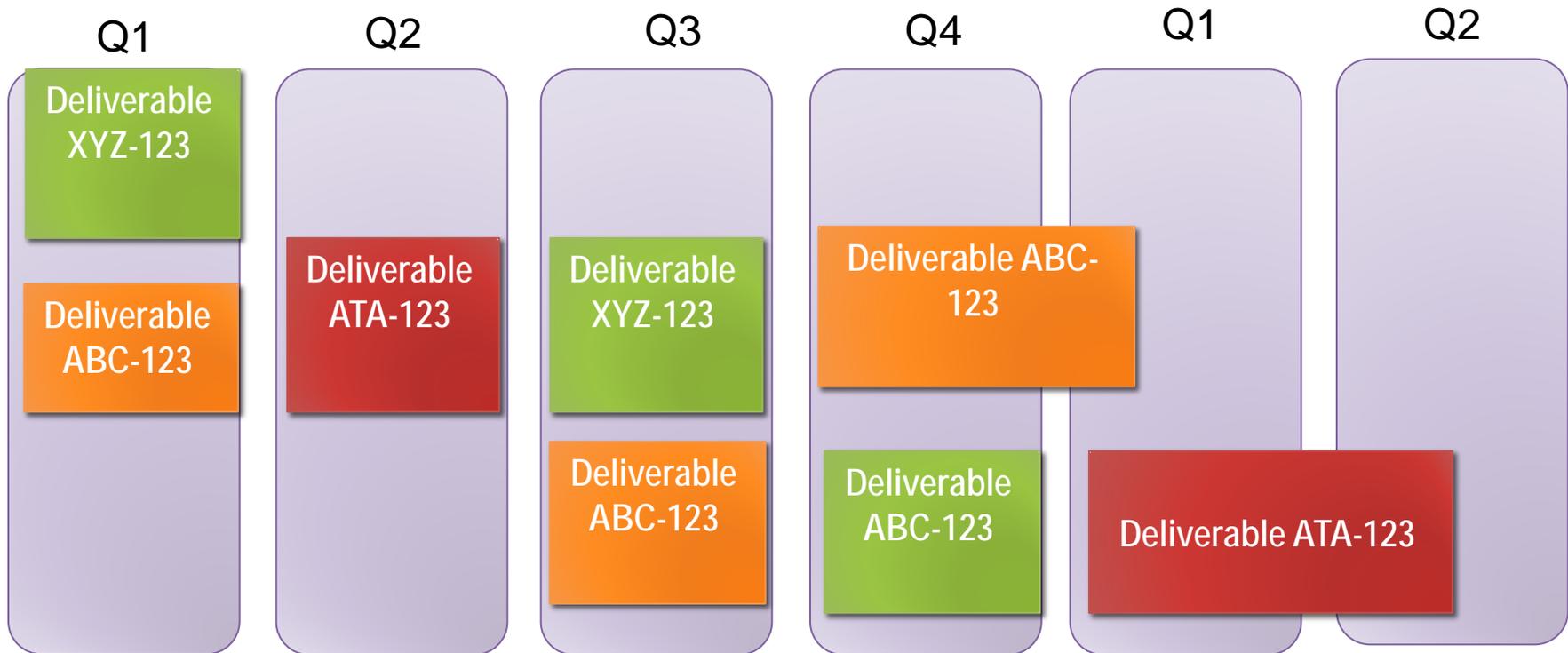
- Operate system
- Support system
- Identify defects and enhancements
- Transition to Support team

This lifecycle is only a guide, smaller projects and enhancements may not need all these steps

Iteration Lifecycle

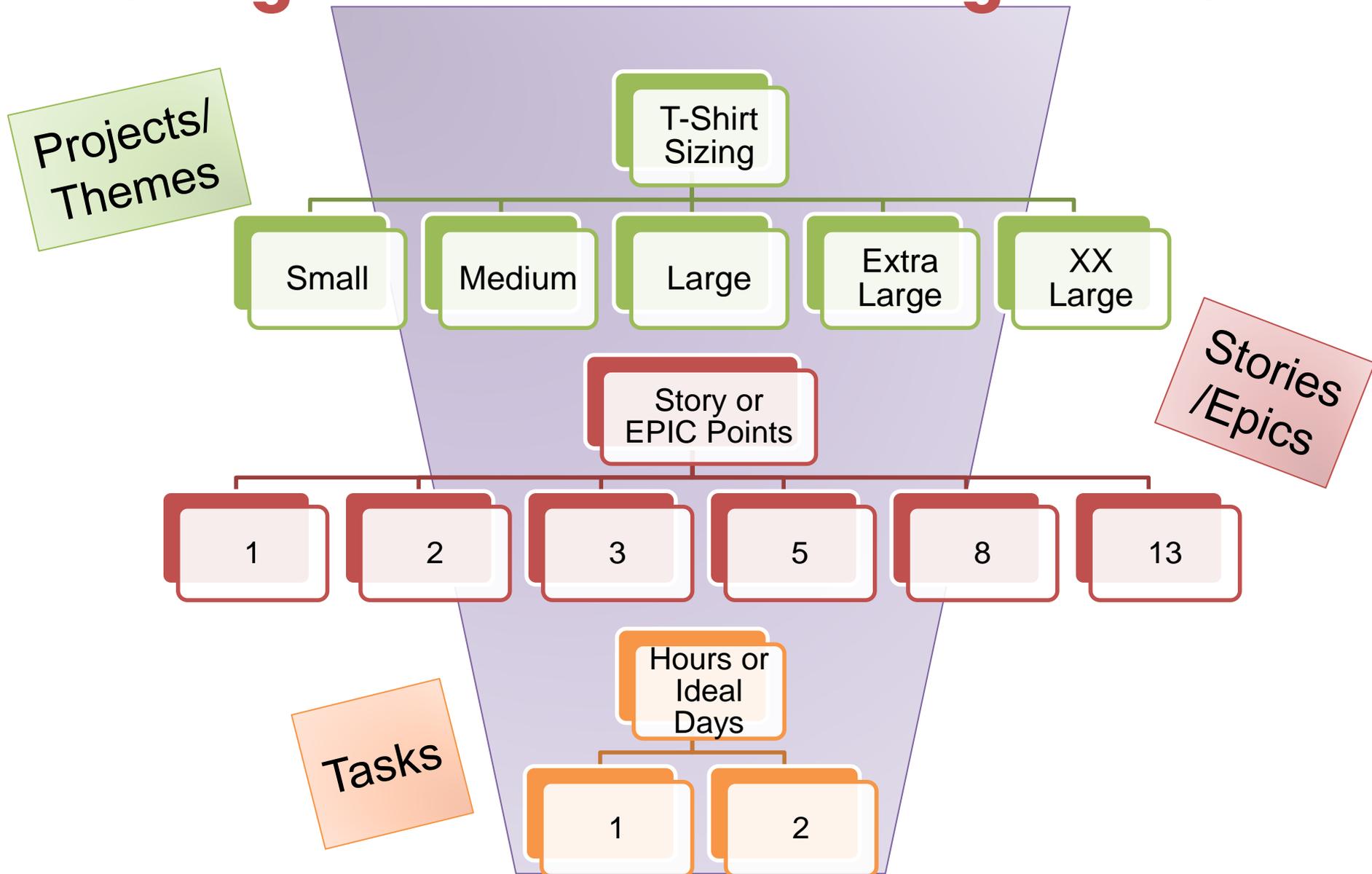


Example Strategic Roadmap



Priority	Project	Strategic Alignment	Epic Points	20XX				20XX							
				Q3 Jul Aug Sep			Q4 Oct Nov Dec		Q1 Jan Feb Mar		Q2 Apr May Jun				
1	Cobalt User Interface	Customer Satisfaction	20			◆									
2	Easy un-attach of records	Customer Satisfaction	3			◆									
3	OWT Migration	Retention, Acquisition, PR	40				◆	◆							
4	Add stories to trees	Retention, Customer Satisfaction	20					◆	◆						
5	Audio on trees	PR, Retention	40						◆	◆					
6	Virtual Stitch	Customer Satisfaction, Retention	80		◆	◆	◆	◆							
7	OFT Migration	Retention, Acquisition, PR	40							◆	◆				
8	True Collaboration (Next Revision)	Retention, Acquisition	40								◆	◆			
9	Import (FTW, PAF)	Acquisition, Lower CPA	60									◆	◆		
10	Export to FTW w/ Objects	Customer Satisfaction	40										◆	◆	
11	Household Merge	Customer Satisfaction	40											◆	◆
	Export to GEDCOM	Customer Satisfaction	13												◆

The 'Right Method' for the 'Right Time'



Story Points

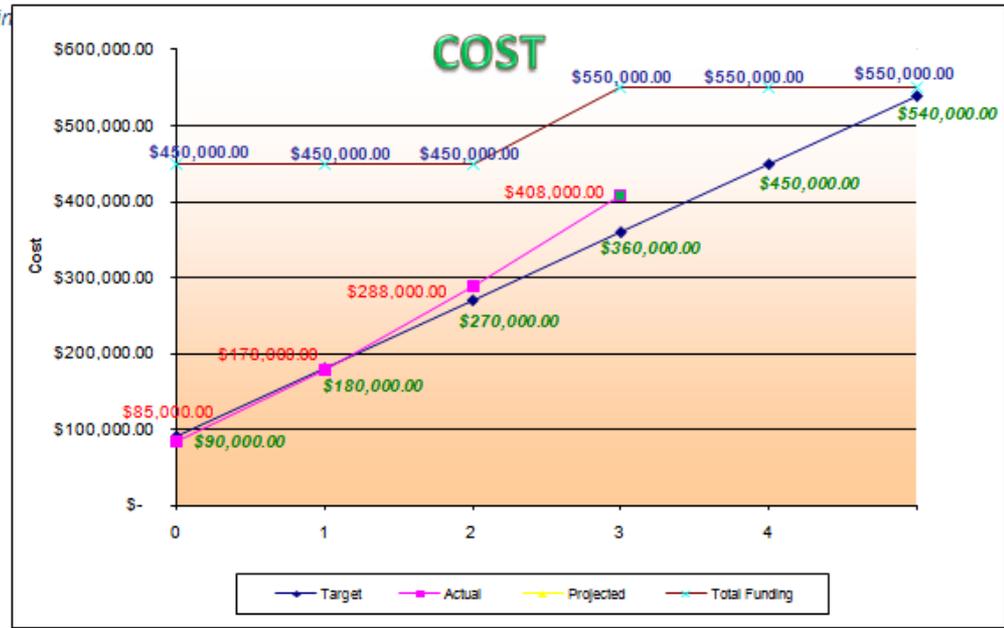
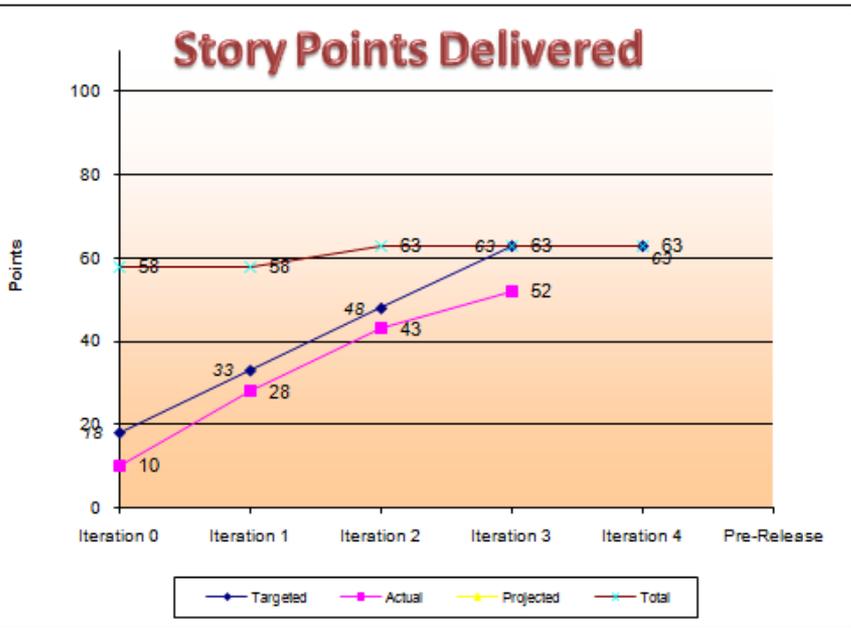
- Relative sizing is achieved through comparing items to each other.



How many stories a team gets 'Done' each cycle is their **Velocity**

Sample Point and Cost Burn Up Chart

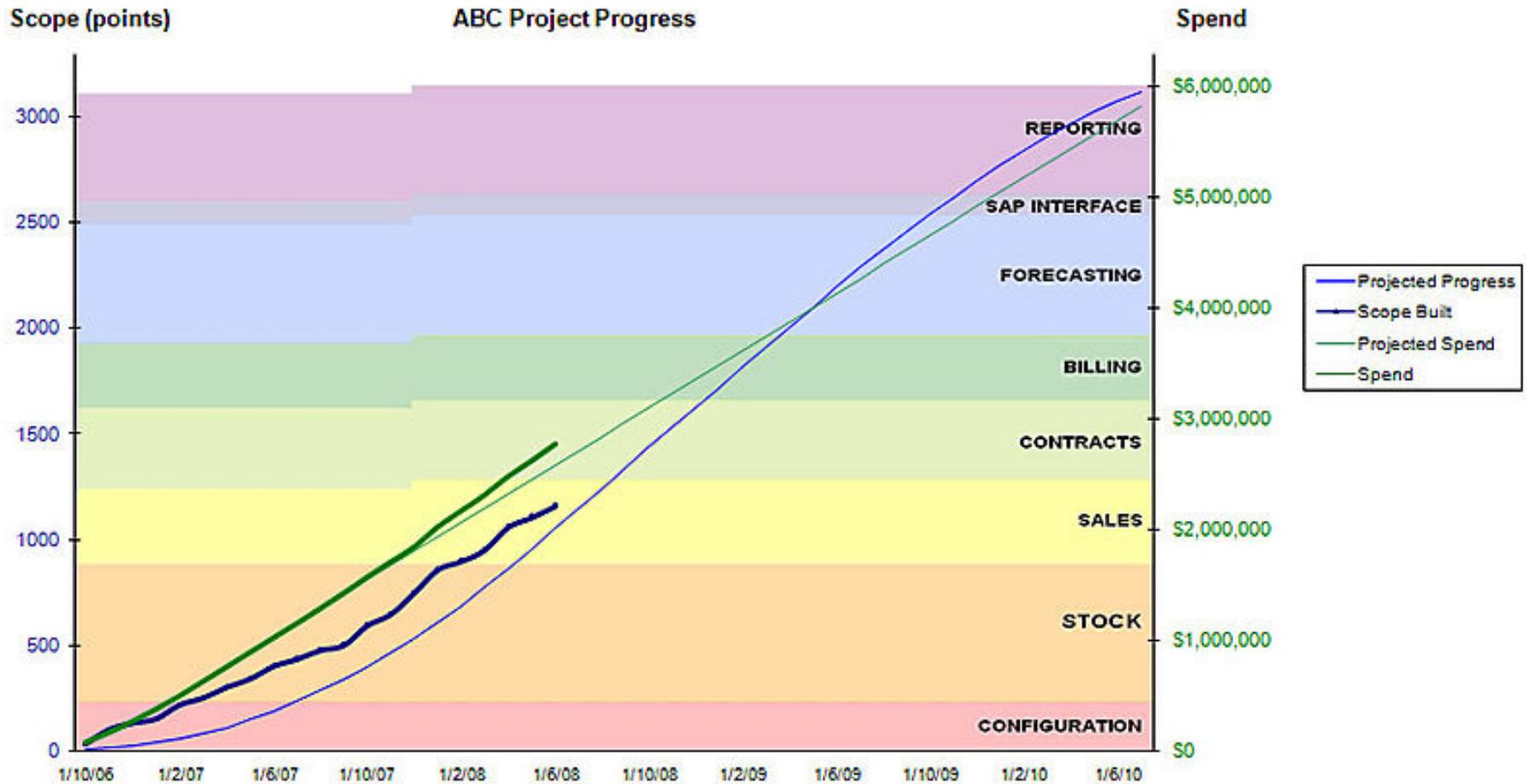
What is 'Done'? How much did it cost me?



Current Project % Done 83%

Current Project % Burn 74%

EVM - Value Cost Burn-up



Source: www.leadinganswers.com Mike Griffiths

DEMO: AGILE RELEASE PLAN

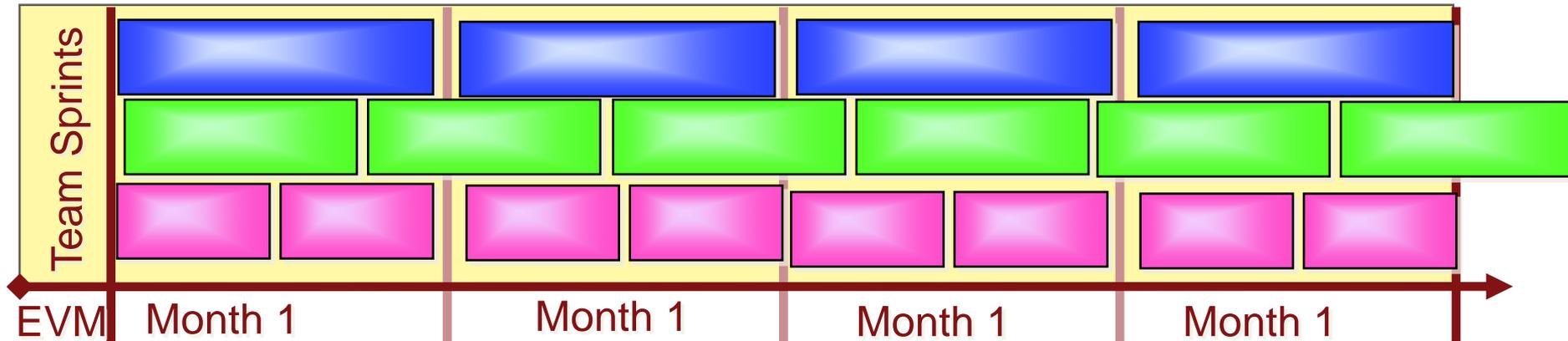
Release Baseline

Target vs. Actual Variance

Scope Tracking

EVM Reporting for Agile Teams

Agile teams run on 2, 3 or 4 week iterations. EVM requires monthly reporting. What challenges does this create?



From Silos to Collaboration



From Silos working independently handing off work to each other.



To

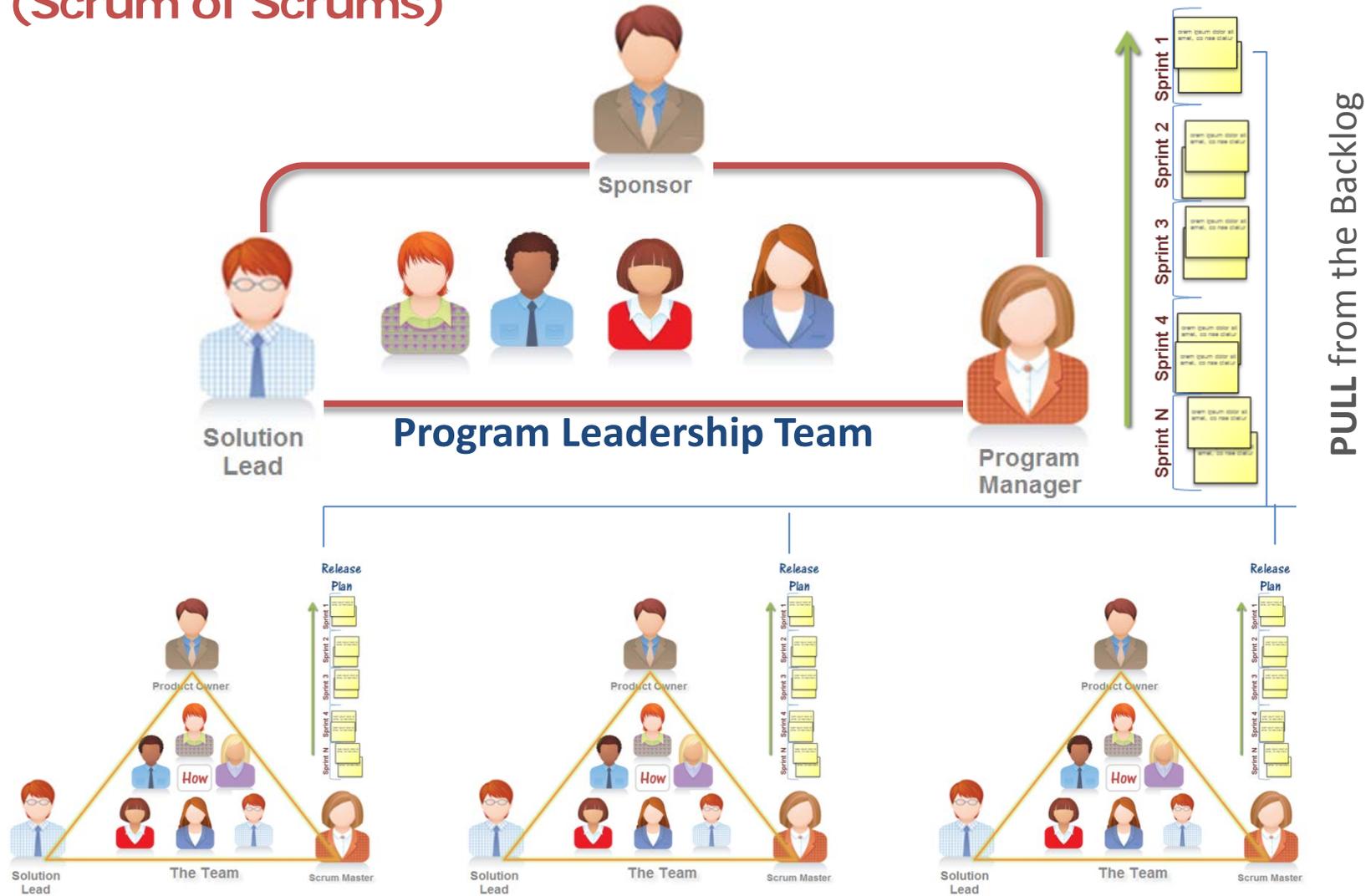


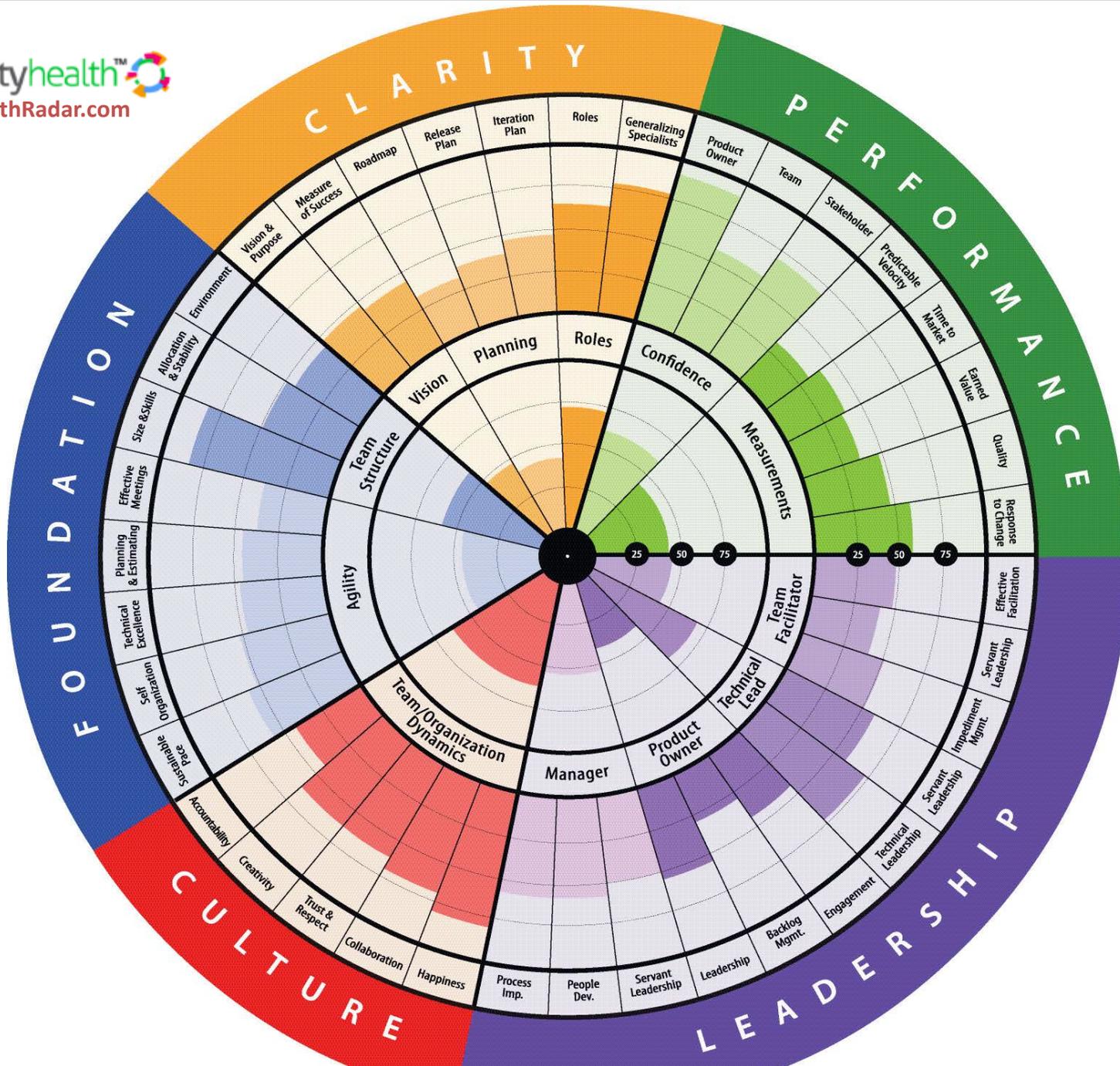
Cross-functional teams working collaboratively to deliver on a common target.



Program View

(Scrum of Scrums)





Sample Enterprise Capacity Table

Enterprise capacity is *estimated* by how many points your stable teams can deliver per quarter.

	Velocity Avg by Team			
	Team A	Team B	Team C	Team D
Q1	475	200	350	150
Q2	400	250	390	230
Q3	435	275	425	200
Q4	450	260	400	245
Yearly	1760	985	1565	825

Prioritizing Using Business Value Buckets

Prioritizing Requirements Using Business Value Buckets

This approach provides a consistent way for product management and business decision makers to prioritize requirements by discussing each story in terms of a set of business value buckets before deciding on the final business value points for each requirement. These buckets should align with current strategic goals. The steps are simple:



<p>Generates Money (x2) <i>Light Value = 10</i> <i>Medium Value = 20</i> <i>High Value = 30</i> <i>Very High Value = 40</i> <u>Helpful Considerations:</u> - how much revenue does it generate? - how quick is the ROI?</p>	<p>Saves Money (x1) <i>Light Value = 10</i> <i>Medium Value = 20</i> <i>High Value = 30</i> <i>Very High Value = 40</i> <u>Helpful Considerations:</u> - how much money will it save? - how quick is the ROI?</p>	<p>Improves Customer Satisfaction (x1) <i>Light Value = 10</i> <i>Medium Value = 20</i> <i>High Value = 30</i> <i>Very High Value = 40</i> <u>Helpful Considerations:</u> - how many customers requested this? Did we commit to it? - How many issues do we have as a result of not having this?</p>	<p>Compliance (x1) <i>Light Value = 10</i> <i>Medium Value = 20</i> <i>High Value = 30</i> <i>Very High Value = 40</i> <u>Helpful Considerations:</u> - is this mandatory? Due by when? By which organization? Are there legal implications? Penalties?</p>
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Example:
Ability to Accept PayPal Payments.
 Generate Money: M
 Save Money: N/A
 Customer Satisfaction: L
 Compliance: N/A
 Total is 50, we drop it in the Medium-High bucket.
 if the total was 60, we decide between the 50 or 80 buckets by contrasting with others.

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Metrics Worth Tracking

Portfolio Level

WIP (Work in Progress) - Projects started

Average Lead and Cycle Time - Duration in pipeline

Enterprise Velocity by Quarter

Business Value Points delivered by Quarter

Program and Team Level

Velocity by Team (don't compare teams to each other!)

Defects by Team

Customer and Team Satisfaction Radar

Impediments Count and Cycle Time

Business Value Points

YOUR Questions?



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 - The Agile Team Workbook
 - Blank TeamHealth Radar
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