Disciplined Agile Delivery

A Practitioner's Guide to Agile Software Delivery in the Enterprise

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Foreword by Dave West

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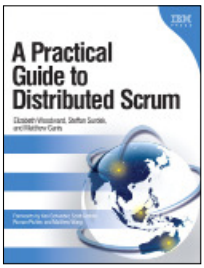


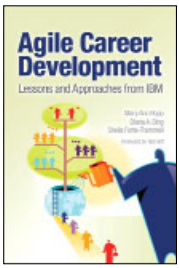
A Practical Guide to Distributed Scrum

By Elizabeth Woodward, Steffan Surdek, and Matthew Ganis

ISBN-13: 978-0-13-704113-8

This is the first comprehensive, practical guide for Scrum practitioners working in large-scale distributed environments. Written by three of IBM's leading Scrum practitioners—in close collaboration with the IBM QSE Scrum Community of more than 1,000 members worldwide—this book offers specific, actionable guidance for everyone who wants to succeed with Scrum in the enterprise.

Readers will follow a journey through the lifecycle of a distributed Scrum project, from envisioning products and setting up teams to preparing for Sprint planning and running retrospectives. Using real-world examples, the book demonstrates how to apply key Scrum practices, such as look-ahead planning in geographically distributed environments. Readers will also gain valuable new insights into the agile management of complex problem and technical domains.



Agile Career Development

Lessons and Approaches from IBM

By Mary Ann Bopp, Diana A. Bing, Sheila Forte-Trammell

ISBN-13: 978-0-13-715364-0

Supercharge Performance by Linking Employee-Driven Career Development with Business Goals

How do you make career development work for both the employee and the business? IBM® has done it by tightly linking employee-driven career development programs with corporate goals. In *Agile Career Development*, three of IBM's leading HR innovators show how IBM has accomplished this by illustrating various lessons and approaches that can be applied to other organizations as well. This book is for every HR professional, learning or training manager, executive, strategist, and any other business leader who wants to create a high-performing organization.

CHAPTER 7

Identifying a Project Vision

Good business leaders create a vision, articulate the vision, passionately own the vision, and relentlessly drive it to completion. —Jack Welch

In many organizations a project officially begins when the team leadership gains agreement and funding from the project sponsor to create an initial vision for the proposed solution. Minimally the vision should answer what are the goals of the project team and who is on it. More robust vision statements also indicate the desired scope of the current release, overview the likely technical strategy to address that scope, and outline the plan to do the required work. When a feasibility study has occurred, the vision statement also summarizes its results. Project teams develop a vision statement to help guide their efforts throughout the rest of the project and to secure funding for the project.

A vision statement, or in more formal environments a project charter or business case, can be used by the project team to guide their efforts in several ways. First, it can be used as criteria for determining when a team has developed sufficient functionality so that it makes sense to release into production.[1] Second, it can be used to help the team keep on track. One of the dangers of evolutionary (iterative and incremental) approaches to delivery is the gradual "death by 1000 requirements changes," where the solution slowly morphs into something that nobody actually wants. This risk can be avoided by having an agreed-to vision (which may also evolve over time), by working closely with a wide range of stakeholders, and through the visibility provided by the regular production of a potentially consumable solution. Third, it often proves to be a key asset in the effort to secure funding for your project team because it summarizes your team's strategy, a

1. Chapter 10 discusses the various release rhythms and their trade-offs.

strategy that your key stakeholders should understand and support. Stakeholders need to agree on the business problem within the context of the larger organizational goals, and how the proposed solution addresses the problem. Your project sponsors need to understand the approach, the constraints, and their satisfaction criteria for the project. All this information is captured by your vision statement.

Figure 7.1 shows a mind map of the structure of this chapter. We describe each of the topics in the map in clockwise order, beginning at the top right.

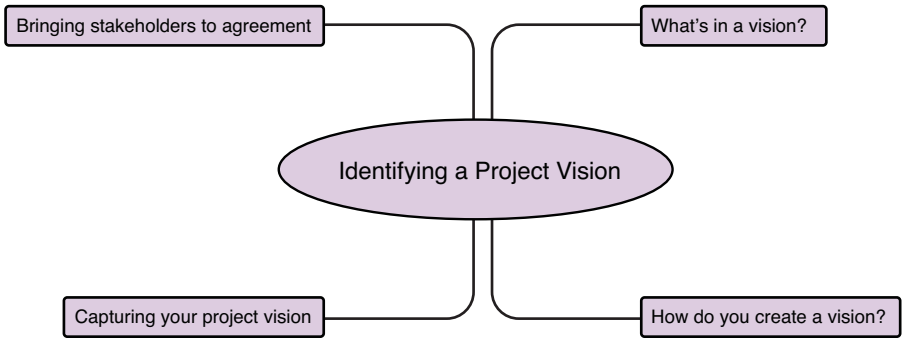


Figure 7.1 Outline of this chapter

The Big Ideas in This Chapter

- The team leadership initially gains agreement from the project sponsor to create an initial vision for the proposed solution.
- During the Inception phase you should come to a relative consensus with your stakeholders as to the scope of the project, the timeline, relevant constraints, and the architectural strategy. The details will still evolve throughout the project.
- A key challenge of creating a vision is to obtain enough information to gain stakeholder consensus to proceed with the project without producing too much documentation.
- Different aspects of your vision are documented in parallel as you learn more information about your stakeholder needs.

What's in a Vision?

Vision statements answer several fundamental questions, including: What are you going to produce? How long will it take? What will it cost? How are you going to build it? Do you understand the risks?

To answer these questions, the vision statement may contain the following information:

- The business problem that is being addressed and the value to your organization of doing so.
- High-level technical architecture being followed, and, if appropriate, any alternatives considered and why they weren't chosen.
- A summary of the scope, potentially including a list of the major stakeholder goals to be addressed. A scope overview diagram is often useful, such as a use case diagram or a business process diagram.
- The estimated cost of the project, presented as a range, and an indication of the funding approach for the project.
- The project schedule showing number of iterations, their durations, and expected release dates. This is often a high-level Gantt chart.
- A list of the critical project risks, mitigation strategies, and contingency plans.
- A list of key assumptions and decisions, if any.
- An indication of the process being followed, in this case DAD.
- Other project details such as team makeup (resourcing plan), budget constraints, communication plans, escalation procedures, and governance strategy.

Chapter 12, "Case Study: Inception Phase," includes examples of many of the items listed here. Although we have listed many potential topics for a vision statement, you will want to address only the topics appropriate to your situation. This risk of lists such as the one just presented is that some people think they need to fully address them, but our advice is to address an issue only if it adds actual value.

How Do You Create a Vision?

Your strategy will evolve throughout your project, but it is initially defined in an evolutionary manner throughout the Inception phase. Your strategy will reflect the desired scope for your solution, your technical strategy/architecture for addressing that scope, the amount of resources your organization, or your customer, is willing to invest, the amount of time you have to do so, and the ability of the team that you assemble to do the work. These individual components will themselves evolve over time to reflect your growing understanding of what needs to be done and how you will go about doing so. This evolutionary approach to defining your project strategy is overviewed in Figure 7.2. This strategy information is summarized by your project vision.

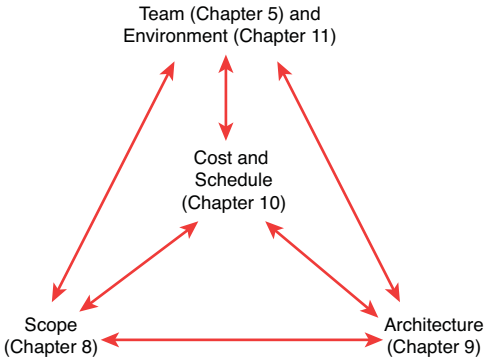


Figure 7.2 Evolving your initial project strategy

Capturing Your Project Vision

Effective vision statements are written using economic terms and the language of your business domain, although technical terms will still creep in at times when describing the proposed solution. The vision statement could be as little as three to four pages capturing a bulleted list of critical decisions and several key diagrams overviewing the scope, schedule, and technical strategy. Or it could be more detailed, often a requirement in regulatory environments or organizations with cultures still in the process of transitioning to agile, running to ten to fifteen pages. As with other artifacts, we recommend the agile principle of keeping the vision statement as concise as possible and just good enough to achieve its goals.

There are several approaches that you can take, which are compared in Table 7.1, when formulating the vision for your project:

- **Detailed vision document/project charter/business case.** This can be a document of up to 50 pages or more, although 20 to 30 pages are far more common. It describes in detail your financial analysis regarding the projected costs and benefits of your solution; the technical strategy, the trade-offs associated with it, and the validity of the direction you've chosen; a detailed project timeline, often captured as a Gantt chart; and a description of the business problem being addressed. If a detailed vision is required, you may choose to split the vision document into more traditional documents such as vision, project plan, business case, risk list, or architecture document. However, our preference is fewer, smaller documents are better, with separate sections for each area of concern. The primary difference between a vision document and a project charter or business case may be the inclusion of the results of a feasibility assessment. Good feasibility

assessments address the economic feasibility (will we make/save money?), technical feasibility (do we think we can build it?), operational feasibility (can we run it once delivered?), and political feasibility (will our stakeholder community accept it)? Having said that, many vision documents also address feasibility to some extent so the line between charters, visions, and business cases is often blurred.

- **Lightweight vision statement.** A lightweight vision statement is a short document of roughly 1-4 pages that describes what you are doing and why you are doing it. It could include in short form descriptions of key project information such as the business problem to be solved, key features, stakeholders, and constraints—for example, financial, schedule, and technology alternatives. It should answer a question like "why are we spending $100,000 on this project?" Think of your vision statement as a sales brochure that is a compelling and concise description of the value of the project. Examples of the content of a lightweight vision statement can be found in Chapter 12.
- **Vision radiators.** Critical information about your project is captured on whiteboards or flipchart paper and posted on the walls of your team's work area so that it is visible to all team members. The practice of displaying information on all things related to the project is known as visual management, big visible charts, and information radiators (by Alistair Cockburn).
- **No investment in a shared vision.** Some teams decide to jump straight into construction without spending the time to formulate a shared vision to guide their efforts.

We suggest that you invest in a lightweight vision statement and combine it where possible with vision radiators. Having a document that provides an overview of what your project team intends to deliver will help to build trust with your stakeholders and help guide your decisions later in the project.

Lessons from the Trenches—Vision Statements Help You to Steer

Darren Blyth is a talented business analyst whom Mark has worked with for many years. Sometimes as a project proceeds teams find themselves doing more work than was initially envisioned at the beginning of the project. It is easy to fall for the temptation for changing scope in an uncontrolled fashion. At times Darren has helped avoid this by asking the teams "Why are we doing this? Does this support our approved business case and vision?" This is where it is useful to have a vision produced at the time the project was initially approved and funded in the Inception phase. The vision serves as the beacon to keep the team on track rather than trying to produce a solution that solves an unrelated business problem, or worse, solves no problem at all.

Table 7.1 Comparing Vision Strategies

Strategy	Potential Advantages	Potential Disadvantages	Considerations
Detailed vision document, project charter, or business case	Satisfies organizational or regulatory documentation requirements for project initiation.	Detailed descriptions can put a "scientific façade" over something that is inherently artful at this point in your project. Senior management may expect this document as a firm commitment. Requires extensive modeling and planning, thereby increasing the Inception phase effort.	Beware of aggressive, quantified benefits that often result in dysfunctional or myopic behavior that sacrifices holistic enterprise goals for short-sighted project goals.[2]
Lightweight vision statement	Satisfies organizational or regulatory documentation requirements for project initiation. Provides the team with a consumable description of their overall business and technical direction. Builds trust with your stakeholders.	Senior managers with significant traditional experience may see lightweight documentation as a project risk.	You still need to do some serious thinking. Don't allow sloppy thinking around the scope, architecture strategy, and overall planning to be excused through adoption of this practice.
Vision radiators	Provides the team with very consumable guidance.	Will not be easily accessible to any distributed team members or stakeholders. You may still need to document the vision at some point.	You may still have missing or poorly understood issues. Just because the information is in front of everyone it doesn't imply that they understand or agree to it. In addition, the information can be easily changed without governance. That might be an advantage, but could also lead to a situation where resources are working to different versions of the vision.

2. Galinsky & Bazerman have found that aggressive goal setting within an organization will foster an organizational climate ripe for unethical behavior. In the December 2010 State of the IT Union survey Scott found that unethical behavior is far too common on IT delivery projects, although agile teams were least likely to exhibit such behavior.