Agile Chartering
from Strategic to Tactical
Managing Risk and Quality

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Agile 2015
“The Gartner keynote at the PPM & IT Governance Summit reported that by the end of 2017, about 50% of IT-related spend is projected to occur outside of the IT domain.

How will an IT PMO align project and program execution with strategy when half (or more!) of the technology budget is not even controlled by IT?”

Gartner Forecast: Prepare for a Digital Storm, Ben Chamberlin
Success = High Value Delivery
What the customer wants and values
That creates value for the business
That the customer will accept & exchange value for
In a timeframe that suits the customers’ needs
Easily maintainable and supportable after deployment
In a way that leaves team members ready and eager to work on the next deliverable
Liftoff Activities

Collaborative Agile Chartering Kick-Off Workshops
Iteration/Sprint 0
Boot Camps
Retrospective & FutureSpective
Impact Mapping or Story Mapping
Preparing an Initial Backlog
Internal Open Space Meeting
Set Conditions for Team Learning

Keep it Alive!
Do it for Real
Setting First
Start Obvious, Stay Obvious
Focus on Flow

Larsen & Larsen.
Quickstart Guide to Five Rules for Accelerated Learning
It’s the Chartering not the Charter
Purpose

Product Vision
Team Mission
Mission Tests
Product Vision – the shared picture of the desired future when the team has delivered and the product is in use by the customer; the ultimate expression of value.

Mission – describes the team’s unique contribution to achieving the Vision; it both directs and limits tactical choices.

Mission Tests – the critical 5 or fewer measurable indicators of a successful project outcome; they define done and can be internal or external measures. Mission Tests validate the strategy of the Mission as demonstrated by results of tactics.
What is your current team Purpose?
Alignment

Core Team
Simple Rules
Working Agreements
Core Team - Chartering acts as an initial team building activity; team members get to know the strengths, capabilities and commitments of each other, and learn what each wants to contribute and gain from participation on the team.

Simple Rules - fairly short positive statements that express a shared understanding of the team values and help to communicate the values in an actionable way.

Working Agreements – operational guidelines to help the team accomplish the Mission; they have a standard-setting or aspirational quality.
How quickly do your teams align on teamwork and process?
Context

Boundaries & Interactions
Committed Resources
Prospective Analysis
**Boundaries & Interactions** – Clear understanding of what’s needed for a good flow of communication. Defines the relative responsibilities of the core team and others in the project community and the limits of authority.

**Committed Resources** – The planned level of sponsor commitment for the non-human assets required by the core team.

**Prospective Analysis** - First pass understanding of what we anticipate about the work (potential risks/ hazards and opportunities/benefits) and our ability to achieve the Mission.
What difference would it make to understand more about your work context right from the beginning?
Big Visible Chartering
How does conducting liftoffs and drafting agile charters at the inception of portfolio, program, and project work help to address:

- strategic and tactical alignment
- risk identification and mitigation
- quality management?
What risks do you experience?

What process or systemic barriers to quality do you experience?
Activities for Team Chartering

"Misunderstandings and neglect create more confusion in this world than trickery or malice."

Goethe
Purpose - Create a Brochure

Create a tangible representation of your Purpose. Consider:

- Product name
- Brand, logo
- Testimonials
- Product features
- Why should anyone use this product?
- How can the reader take action?

Raccoon Rescue Database

Living in harmony with regional native wildlife

- 30 min. response
- 200+ local shelters
- Trackers 24x7

** Free **

Habitat evaluation

Questions?
Call 1-800 Raccoon
Purpose - Elevator Test

Can you explain the purpose of the project to someone in under two minutes?

For (target customer)
Who (statement of the need or opportunity)
The (product name) is a (product category)
That (key benefit, compelling reason to buy)
Unlike (primary competitive alternative)
Our product (statement of primary differentiation)

Source: Agile Project Management, Jim Highsmith
Alignment - Competence Matrix

Discover if the team has all needed competencies, find areas with external dependencies, and find connections between the team members.

1. Design the competence matrix, brainstorm competencies
2. The participants mark their competence level and interest areas inside the matrix
3. Together analyze the matrix to find areas of expertise and competence gaps.

Anders Laestadius
http://blog.crisp.se/2012/11/06/anderslaestadius/team-liftoff-with-market-of-skills-and-competence-matrix
Alignment - Working Agreements

Finish this sentence in 5 ways –

“We work best together when...”

1.
2.
3.
4.
5.
Alignment - Personal Posters

Gloria

Gifts
- Positivity
- Critical thinking
- Coaching

Challenges at Work
- Over-tasked
- New team
- Extroverts

Personal Objectives
- Learn to say "no"
- Apply what I learn
- More time for myself

"Later"
- Spent several years playing poker as my primary source of income

One day at a time
Context - Prospective Analysis
Context – Context/Boundary Diagram
Table Group Activity

You are an IT PMO team at Flibits Company with 3 brand new members from the recently acquired WhyMe? Inc.

Vision – No tool without a rule and every team has what it needs to do it’s best work.

Team Mission – Integrate any of the WhyMe? PMO tools and practices that are necessary to support, or which can add value to the new Flibits.

Mission Tests –
Team reports successful testing of necessary WhyMe? tools/practices by EOQ1 2016
Team reports successful testing of value-add WhyMe? tools/practices by EOQ2 2016
PMO team survey shows overall satisfaction greater 90% EOQ2 2016
How did it go?
How would Agile Chartering benefit your team?
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Future-spectives, by Anders Laestadius -  
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Impact Mapping: Mark Kilby’s Impact Mapping Cheatsheet pdf -  
https://drive.google.com/file/d/0B6cGHI2KoxU4RIBZTWR4SkQ1UG8/view?pli=1

Open Space Technology -  
http://openspaceworld.org/wp2/ and  
http://www.openspaceworld.com/
Example PMO Purpose

Vision – Every project/program sees its results/products contributing to the overall stated intentions and aspirations of the organization.

Mission – For senior management and program/project leadership, the PMO will develop and execute plans and strategies for project/program management that will provide more value to the customer, identify unsuccessful efforts early, and continuously make status visible.

Mission Tests (all assessed quarterly) –

Improved 3 point customer satisfaction rating of value delivered
85% increase of project/program expenditures spent on successes
Increased hours of senior management engagement w/PMO
Increased experience reports to PMO from project/program teams