Governance, Phases, and Milestones are not Agile Dirty Words!

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Disciplined Agile 2.0
A Process Decision Framework for Enterprise I.T.

For more information, please visit:
DisciplinedAgileDelivery.com
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“Choice is Good.”

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Basic/Agile Lifecycle

A full Scrum-based agile delivery lifecycle.

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Lean Lifecycle

A full lean delivery lifecycle
The Phases Disappear Over Time

First release: Inception Construction Transition

Second release: I Construction T

Third release: I Construction T

N\textsuperscript{th}+ releases: C T C T C T C T
Lean Continuous Delivery Lifecycle

Your evolutionary end goal?
Sometimes it takes time to identify what your stakeholders actually need
Typical Evolution of Lifecycle Mix

Current
- Agile/Scrum: 10%
- Lean: 90%

2 years
- Agile/Scrum: 20%
- Lean: 10%
- Exploratory/Lean Start-up: 5%
- Continuous Delivery: 15%
- Traditional: 50%

5 years
- Agile/Scrum: 40%
- Lean: 10%
- Exploratory/Lean Start-up: 5%
- Continuous Delivery: 30%
- Traditional: 15%

Choice is good!
Governing Disciplined Agile Teams
Many Organizations Are Serious About Governance

The farther to the right an organization, the greater the chance they’re focused on governance.
Governance Should Address a Range of Issues

- Team roles and responsibilities
- Individual roles and responsibilities
- Decision rights and decision making process
- Governing body
- Exceptions and escalation processes
- Knowledge sharing processes
- Metrics strategy
- Risk mitigation
- Reward structure
- Status reporting
- Audit processes
- Policies, standards, and guidelines
- Artifacts and their lifecycles
Why is Governance Important?

- Sustain and extend your IT strategies and objectives, which in turn should reflect your corporate strategies and objectives
- Determine how the company will execute its strategy by selecting and prioritizing the most valuable initiatives to undertake
- Empower teams to carry out their work
- Help to ensure that delivery teams:
  - Regularly and consistently create real business value
  - Provide appropriate return on investment (ROI)
  - Deliver consumable solutions in a timely and relevant manner
  - Work effectively with their project stakeholders
  - Work effectively with their IT colleagues
  - Adopt processes and organizational structures that encourage successful IT solution delivery
  - Present accurate and timely information to project stakeholders
  - Mitigate the risks associated with the project
Why Traditional Governance Strategies Won’t Work

Traditional assumptions that conflict with agile:

- You can judge team progress from generation of artifacts
- Delivery teams should work in a serial manner
- You want teams to follow a common, repeatable process
- Projects should be driven by senior IT management
Principles of Agile Governance

Collaboration over conformance

Enablement over inspection

Continuous monitoring over quality gates

Transparency over management reporting
DAD Practices that Support Governance

- **“Standard” agile practices:**
  - Coordination meeting
  - Iteration demonstrations
  - All-hands demonstrations
  - Retrospective
  - Information radiators/Visual management

- **Disciplined practices:**
  - Risk-value lifecycle
  - Explicit light-weight milestones
  - Follow enterprise development guidelines
  - Work closely with enterprise professionals
  - Development intelligence via automated dashboards

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Measuring Agile Teams

- Talk to people; don’t manage to the metrics
- Measure teams, not individuals
- Collect several metrics
- Trends are better than scalar values
- Empirical observation is important but limited
- Prefer automated metrics
- Some metrics must be gathered manually
- Prefer pull versus push reporting
- Beware scientific facades
- The value of many metrics diminishes over time
- If you collect no metrics at all you’re flying blind
- If you collect too many metrics you may be flying blinded

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Potential Metrics

- Acceleration
- Activity time
- Age of work items
- Blocking work items
- Build health
- Business value delivered
- Code quality
- Cumulative flow
- Cycle time
- Defect density
- Defect trend
- Iteration burndown
- Lead time
- Net present value (NPV)
- Ranged release burndown/up
- Release burndown/up
- Return on investment (ROI)
- Stakeholder satisfaction
- Net promoter score
- Team morale
- Test coverage
- Velocity
- Work in process (WIP)
DAD Initiatives have Milestones and *may* have Phases

Milestone Reviews should be lightweight!
Inception Phase Milestone: Stakeholder Vision
What’s in a Project Vision?

• Could be thought of as an agile project charter

• Typically outlines:
  – Goals of the project team and who is on it
  – High-level scope of the current release
  – Technical overview of the solution
  – Outline of the plan to do the required work
  – Could include feasibility information

• Could also describe:
  – Business problem being addressed
  – High-level schedule and estimates
  – Key milestones
  – Stakeholders
  – Funding models
  – Project risks and constraints
  – Process/method used (e.g. DAD), governance strategy
  – Key assumptions
Milestone: Bringing Stakeholders to Agreement around your Vision

- Inception is complete and you can enter the Construction phase when:
  - Your stakeholders agree that it makes sense to proceed based upon the achievable scope, schedule, budget, constraints, and other criteria related to your business case
  - The risks have been identified and seem tolerable
  - There is agreement on using a minimalist and agile process for building the solution
  - The team and environment have been set up that supports collaborative teamwork, or are in the process of being so
  - The process and governance strategies have been agreed to by both your team and your stakeholders

<table>
<thead>
<tr>
<th>Inception</th>
<th>Construction</th>
<th>Transition</th>
</tr>
</thead>
<tbody>
<tr>
<td>One or more short iterations</td>
<td>Many short iterations producing a potentially consumable solution each iteration</td>
<td>One or more short iterations</td>
</tr>
<tr>
<td>Stakeholder vision</td>
<td>Project viability (several)</td>
<td>Production ready</td>
</tr>
<tr>
<td>Proven architecture</td>
<td>Sufficient functionality</td>
<td>Delighted stakeholders</td>
</tr>
</tbody>
</table>
Develop Common Vision Goal

The Process Goals of Disciplined Agile Delivery (DAD)

- Form initial team
- Develop common vision
- Align with enterprise direction
- Explore initial scope
- Identify initial technical strategy
- Develop initial release plan
- Secure funding
- Form work environment
- Identify risks

Inception (How do we start?)

- Ensure the solution is consumable
- Deploy the solution

Construction (How do we produce a solution?)

- Produce a potentially consumable solution
- Address changing stakeholder needs
- Move closer to deployable release
- Improve quality
- Prove architecture early

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Transition (How do we deploy?)

- Grow team members
- Fulfill the team mission
- Leverage and enhance existing Infrastructure
- Address Risk
- Improve team process and environment
- Coordinate Activities

Ongoing (What do we do throughout?)

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An Example of a Lightweight Milestone Review…

Scenario:

• End of 2 week Inception phase
• Invitees to review meeting
  • Sponsor
  • Product Owner
  • Delivery Team
• Other stakeholders
  • Architecture
  • Data
  • Governance
  • Support

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Is this idea is worthwhile and feasible, and if not, expend no further resources, cancel project, or consider alternatives.

- Stakeholders agree it makes sense to proceed based on initial agreement on achievable scope, schedule, budget, constraints, and other business case criteria.
- Identified risks seem tolerable.
- Agreement on using minimalist and agile process for developing the solution.
- Team and environment have been setup to foster collaborative team work.
- Process and governance strategies agreed by team and stakeholders.
Scenario:
• End of 2 week Construction iteration
• Invitees to review meeting
  • Delivery Team
  • Product Owner
  • Other stakeholders
    • Architecture
    • Data
    • Governance
    • Support
Questions & Answers
Disciplined Agile 2.0
A Process Decision Framework for Enterprise I.T.

Governance cuts across all process blades

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“Choice is Good.”
There are many factors to consider when adopting Agile IT Governance.
Let’s illustrate a few examples of where we need to consider governance across IT…
Governance – Guidance for Portfolio Management
Governance – Guidance for Enterprise Architecture

- **Active stakeholder participation**
  - Trusted advisor
  - Coach and mentor
  - Create business roadmap

- **Active team member**
  - Trusted advisor
  - Coach and mentor
  - Identify reuse opportunities
  - Identify technical debt
  - Define application architecture
  - Review artifacts

- **Security**
  - Information
  - Business Process
  - Technology
  - Organizational

- **Regularly share learnings**
  - Informal modeling sessions
  - Investigate technologies
  - Identify candidate architectures
  - Formal modeling sessions

- **Evolve Enterprise Architecture**
  - Custom built
    - TOGAF
    - Zachman
    - DODAF/MODAF
    - None

- **Tailor Architectural Framework**
  - Create high-level models
  - Create technology roadmap
  - Develop executable interface definitions
  - Develop executable reference architectures
  - Develop architectural runways
  - Document detailed interface definitions
  - Document reference architectures
  - Document detailed end-to-end model(s)
  - Write detailed white papers

- **Govern Architecture**
  - Develop architecture guidance
    - Monitor and measure
    - Develop architecture metrics
    - Review artifacts
    - Enforce adherence to guidance

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Governance – Guidance for Reuse Engineering
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Governance – Guidance for Operations
In Summary…

• Governance cuts across all of IT
• Disciplined Agile 2.0 enriches the Governance Guidance in the process blades outside of IT Delivery
• More detail is coming with specific recommendations for each of the new process blades

• Questions?