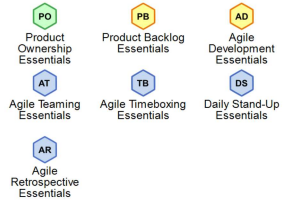
Agile Essentials

The Agile Essentials practices provide a basic starter kit toolbox that covers all the common and critical aspects of team-based development.



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Product Ownership Essentials

Own, evolve and communicate the vision, and guide the evolution of the product to achieve the vision.

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Product Ownership

A single point of ownership for a product that provides rapid, empowered decisions and dispute arbitration regarding what should be built into the product.

Having one person play this role (the "Product Owner") provides the responsiveness needed for agile delivery, but this person must be able to represent all stakeholders and will need support from others in the team.

Owns: Product Vision
Represents: Stakeholders
Ref: Product Ownership

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Build Stakeholder Network

Actively engage all stakeholders with a legitimate and material interest in the endeavor, including eliciting feedback and negotiating compromises as required.

Stakeholders: Involved
Stakeholder Network: Representatives Named or beyond

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Stakeholder Network

Who the stakeholder representatives are, and how we will engage with them throughout the endeavor.

Stakeholder Types Described

Representatives Named

Communication Plans Outlined

Describes: Stakeholders

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Evolve the Product Vision

Agree and communicate the goals and return-on-investment case for the product to drive and inform ongoing decisions about the product.

Opportunity: Value Established
Product Vision: Value Release Strategy Outlined

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Product Vision

Communicates what is ultimately wanted or needed from the product, as well as how value will be progressively realized.

- Need Identified
- Solution Envisaged
- Value Release Strategy Outlined
- ROI Projected

Describes: Opportunity
Ref: Product Vision

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Demonstrate the Product

Show the evolving product to stakeholders and elicit feedback as frequently as possible to converge on an optimal solution.

- Stakeholders: Involved
- Opportunity: Value Established

Understand Stakeholder Needs
- Stakeholder Representation
- Testing

- Stakeholders: In Agreement (contributes to)
- Opportunity: Viable (contributes to)

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Achieve Acceptance

The product is accepted for release. Progressively accepting the product enables frequent releases to be made to maximize return-on-investment.

- Stakeholders: In Agreement
- Opportunity: Viable

Ensure Stakeholder Satisfaction
- Stakeholder Representation
- Testing

- Stakeholders: Satisfied for Deployment
- Opportunity: Addressed

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Resources

- **Product Ownership**: Scrum recommends a single Product Owner to fulfil the Product Ownership responsibilities, see http://www.scrumguides.org/scrum-guide.html#team-po.
- **Product Vision**: This is a common and well-established practice, see for example **Managing Software Requirements**, by Dean Leffingwell and Don Widrig (Addison-Wesley 2000).

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Product Backlog Essentials

Capture what the users of a system want it to do as a priority-ranked list of independently buildable items.

- Product Backlog
- Refine Product Backlog
- Product Backlog Item
- INVEST
- Splitting Product Backlog Items
- Relative Estimating
- Agree Definition of Done
- Definition of Done
- Prepare a Product Backlog Item
- Test Case
- Resources

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Product Backlog

An ordered list of things to build into the product to enhance its value.

- Items Gathered
- Items Prioritized
- Cost-Benefit Quantified

Describes: Requirements
Ref: Agile Backlog and Product Backlog in Scrum

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Refine Product Backlog

Get and keep the Product Backlog visible, up-to-date and in good working order, with high priority items well understood.

Product Backlog: (any level)

Understand the Requirements

Stakeholder Representation | Analysis | Development | Testing

Requirements: Coherent (contributes to)

- Product Backlog: Items Prioritized
- Product Backlog Item: Identified (New Product Backlog Items)

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Product Backlog Item

Something to build into the product to enhance its value.

Identified

Ready for Development

Done

Relates to: Requirements

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INVEST

An acronym of the quality criteria for a Product Backlog Item to be ready for development:

- **Independent** – can be independently built / tested
- **Negotiable** – e.g. in its detail or even into or out of scope
- **Valuable**
- **Estimable** – can be sized
- **Small** – enough e.g. to be implemented rapidly, e.g. in a week or less
- **Testable**.

Relates To: Product Backlog Item

Ref: INVEST

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Splitting Product Backlog Items

Small things get done faster. In agile development there is a continuous and relentless drive to reduce the size of backlog items by splitting bigger items into smaller ones. The key is to ensure that each item delivers value:

- Splits should support meaningful user interactions, no matter how small or "specialized" (think "thin end-to-end journey / slice") not technical architecture "dice" (e.g. front-end without back-end)
- Remember: each and every Test Case is a potential backlog item.

Splits: Product Backlog Item

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Relative Estimating

Effort to get Product Backlog Items done is estimated not in absolute units of time, but relative to each other. This allows progress to be predicted based on performance.

The unit is often called a *"Point"*, e.g. a *"Story Point"* when sizing User Stories.

Teams track the Points they earn per time period by getting Items done. This is used to forecast progress, with confidence levels based on the number of data points and stability of conditions.

One Way To Size: Product Backlog Item

Ref: Relative Estimating

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Agree Definition of Done

Agree the quality criteria that will be used to determine whether any change to the product is fully and correctly implemented.

Understand the Requirements

Stakeholder Representation | Analysis | Development | Testing

Requirements: Coherent (contributes to)

- Definition of Done: Completion Conditions Listed or beyond

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Definition of Done

The quality criteria that will be used to determine whether the product is of acceptable / releasable quality.

Completion Conditions Listed

Quality Criteria and Evidence Described

Describes: Requirements

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Prepare a Product Backlog Item

Ensure that the Product Backlog Item is ready for development and that it is clear how it will be tested.

- Requirements: Conceived
  - Product Backlog: Items Prioritized
  - Product Backlog Item: Identified

Understand the Requirements

Stakeholder Representation (3) Analysis (2) Development (2) Testing (2)

- Requirements: Coherent (contributes to)
  - Test Case: Test Ideas Captured or beyond
  - Product Backlog Item: Ready for Development

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Test Case

Defines test inputs and expected results to help evaluate whether a specific aspect of the system works correctly.

Test Ideas Captured

Scripted

Automated

Describes: Requirements and Product Backlog Item

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Resources

- **Agile Backlog**: A backlog as a ranked to-do list is common to many agile approaches, see https://www.agilealliance.org/glossary/backlog/.
- **INVEST**: This acronym was orignally proposed by Bill Wake: see http://xp123.com/articles/invest-in-good-stories-and-smart-tasks/.
- **Product Backlog in Scrum**: A 'Product Backlog' is part of Scrum, see http://www.scrumguides.org/scrum-guide.html#artifacts-productbacklog.
- **Relative Estimating**: See **Agile Estimating and Planning**, by Mike Cohn (Prentice Hall 2006).

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Agile Development Essentials

Add value to a product by incrementally extending it, ensuring it is usable, releasable and maintainable.

Cross-Functional Team | Product Backlog Item | Test Case | Evolve a Releasable Product

Software Change | Manage Technical Debt | Shared Ownership | Minimal Design

Build Quality In | Automate as Much as Possible | Fast Feedback Loops | Resources

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Cross-Functional Team

The team contains all the specialist skills needed to get the whole job done.

For a team to evolve a complex product such as a software system, this typically means the team members between them must have all the following competencies:

- Stakeholder Representation
- Analysis
- Development
- Testing.

Performs: Evolve a Releasable Product

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Product Backlog Item

Something to build into the product to enhance its value.

- Identified
- Ready for Development
- Done

Relates to: Requirements

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Test Case

Defines test inputs and expected results to help evaluate whether a specific aspect of the system works correctly.

- Test Ideas Captured
- Scripted
- Automated

Describes: Requirements and Product Backlog Item

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Evolve a Releasable Product

Add value to a product and ensure it is usable and of production quality.

- Test Case: Test Ideas Captured
- Product Backlog Item: Ready for Development

Implement the System: Stakeholder Representation (2), Analysis (2), Development (3)

Test the System: Testing (3)

- Requirements: Addressed (contributes to)
  - Test Case: Scripted or beyond
  - Product Backlog Item: Done
- Software System: Demonstrable or beyond
  - Software Change: Code Working or beyond (All Software Changes)

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Software Change

A single change to the code-base that is made for a known purpose and is tested before it is integrated.

- Purpose Clear
- Code Working
- Code Maintainable

Relates to: Software System

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Manage Technical Debt

If value is built into a product one small value increment at a time, and just enough is done to make the product releasable each time, some desired changes to the code-base may be deferred, such as the fixing of non-critical defects.

Each such item of technical debt should be logged, and its subsequent removal prioritized against the adding of more user-requested value into the product.

Part Of: Evolve a Releasable Product

Ref: Technical Debt

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Shared Ownership

The team takes shared responsibility for the product, and no parts of the software system can be considered *"no go areas"* for any team members. This reduces the risks and delays associated with bottlenecks and single points-of-failure.

Strategies for achieving this include pair-working, including pair-programming, and ensuring all code is unit-tested and refactored, so it is clear, clean and maintainable by anyone.

Part Of: Evolve a Releasable Product

Relates To: Cross-Functional Team

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Minimal Design

"Make things as simple as possible, but not simpler" (attributed to Albert Einstein).

Agile teams think hard about design, but focus on adopting the simplest approach to achieving the known things that must be achieved next.

This acts to minimize complexity, risk and time-to-value, and maximize return-on-investment. The design strategy is then evolved continuously as more is learned.

Part Of: Evolve a Releasable Product

Ref: Minimal Design

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Build Quality In

Quality is planned, designed and built in:

- The tests that define acceptable quality are agreed before work is started (e.g. at Product Backlog Item and unit test level)
- An item is not finished until adequate quality has been achieved
- Enough design is done to ensure the right approach is taken, and continuous refactoring is done to ensure that the code-base stays robust and maintainable.

Part Of: Evolve a Releasable Product

Ref: Build Quality In

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Automate as Much as Possible

If a software system is evolved one increment at a time, while ensuring its quality, many actions are repeated frequently. If these are not automated, they will be too slow and error-prone.

For these reasons, actions that should be automated include:

- Continuous Integration / Build
- Code Quality / Unit Tests
- Acceptance / Regression Tests
- Environment Preparation
- Deployment.

Enables: Evolve a Releasable Product

Ref: Automate as Much as Possible

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Fast Feedback Loops

Key to agile development is getting as much feedback as possible, as early as possible, in order to converge on an accurate solution.

To achieve this, tight feedback loops should exist at many levels, including:

- Pair-Programming
- Test-Driven Development
- Continuous Integration
- Frequent Demonstrations
- Validated-learning achieved by releasing early and often.

Part Of: Evolve a Releasable Product

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Resources

- **Automate as Much as Possible**: This is based on the Continuous Delivery principle 'Automate Everything': see http://devopsnet.com/2011/08/04/continuous-delivery/.
- **Build Quality In**: See **Lean Software Development: An Agile Toolkit**, by Mary Poppendieck and Tom Poppendieck (Addison Wesley 2003).
- **Minimal Design**: On Minimal Design - see https://www.agilealliance.org/glossary/simple-design/.
- **Technical Debt**: This is a term originally coined by Ward Cunningham: see http://en.wikipedia.org/wiki/Technical_debt.

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Agile Teaming Essentials

A self-organizing team maximizes its performance by using a highly-collaborative teaming approach.

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Self-Organizing Team

The team is acknowledged as the local experts who are best-placed to decide how to best go about achieving their mission, and to improve their approach over time, based on what they learn as they work together.

The team is empowered to decide how it will work to achieve its goals and, in turn, takes full responsibility for striving to do what it needs to do, and to challenge whatever it needs to challenge, to maximize its performance and levels of success.

Responsible for: Share Knowhow and Collaborate, Communicate, Coordinate

Ref: Self-Organizing Team

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Agile Facilitator

Someone who helps the team apply agile values, principles and practices well to their own work context and team challenges.

An Agile Facilitator has experience of applying agile in many different contexts and is skilled in helping others to think through and solve their own challenges.

This role brings crucial focus and energy to ensuring that the facilities, tools and events that the team needs are well-organized.

Facilitates: Team Kick-Start, Collaborate, Communicate, Coordinate and Share Knowhow

Ref: Agile Facilitator in Scrum

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Team Kick-Start

The team works together to clarify its mission, agree a strategy for achieving it and decide how they will work together as a team.

Team

Prepare to do the Work

Leadership Management

Team: Formed

- Team Membership: Capacity Established or beyond

Way of Working: Principles Established

- Team Way of Working: Outlined

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Team Membership

Shows who is on the team and what percentage of their time is committed to the team. The people on the team are the one true source of all value, so absolute clarity regarding who is and is not dedicated to the team is crucial.

- Members Identified
- Capacity Established
- Responsibilities Defined

Describes: Team

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Team Way of Working

Captures in a clear, simple and visible way, statements from the team as to how they will work together to achieve their mission.

- Mission Clarified
- Outlined
- Practices Described
- Processes Fully Documented

Describes: Way of Working

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Sustainable Pace

The way of working must be sustainable over time. Adequate time must be built in for reflection and adaptation. The team is empowered to resist short-termism in the form of demands to “pull out all the stops” to achieve short-term milestones, if this is detrimental to the long-term health of the team and the endeavor, and would give a false impression of actual progress towards eventual success.

Sometimes we must “stop chopping wood”, so we can “sharpen the axe”.

Applies To: Way of Working

Encapsulated In: Team Way of Working

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Collaborate, Communicate, Coordinate

The team applies and evolves a way of working that maximizes levels of performance, communication and collaboration, and works to secure the facilities they need to do this.

- Team: Formed
- Way of Working: Principles Established
  - Team Way of Working: Outlined

Coordinate Activity

Leadership Management

- Team: Collaborating or beyond
- Way of Working: In Place or beyond
  - Team Way of Working: Outlined or beyond

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Share Knowhow

The team uses techniques, such as pair-working and knowledge-sharing, to propagate skills across the team, and to hand over work to others when the need for this arises.

- Team
- Way of Working

Support the Team

Leadership Management

- Team: Performing
- Way of Working: Working Well

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Collaboration Space

High-performing teams need to be able to collaborate without any delays or barriers, such as a lack of places to meet and work together.

One way to achieve this is to co-locate the team and stakeholder representatives, and provide dedicated work rooms, with plenty of wall-space, white-boards, etc.

If physical co-location is not possible or desirable, then the challenge is to simulate this electronically, using tools, such as dedicated video-conferencing, web-cams, Wikis etc.

Enables:

- Collaborate, Communicate, Coordinate

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Resources

- **Agile Coaching**: See **Agile Coaching**, by Rachel Davies and Liz Sedley (Pragmatic Bookshelf 2009).
- **Agile Facilitator in Scrum**: The Scrum equivalent of an Agile Facilitator is the Scrum Master, see http://www.scrumguides.org/scrum-guide.html#team-sm.
- **Coaching Agile Teams**: See **Coaching Agile Teams**, by Lyssa Adkins (Addison-Wesley 2010).
- **Self-Organizing Team**: Scrum includes the concept of a Self-Organizing Team, see http://www.scrumguides.org/scrum-guide.html#team.

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Agile Timeboxing Essentials

Progress the work as a series of timeboxes, and assess and re-plan at the end of each timebox.

Schedule the Timeboxes | Timebox | Progress Board | Regular Heartbeat

SMART Objectives | Plan a Timebox | Timebox Plan | Review a Timebox

Progress Update | Resources

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Schedule the Timeboxes

Put the dates in the diary when each timebox will start and end, typically through to the end of the project or through to the next major release or equivalent high-level milestone.

- Work: Initiated

Prepare to do the Work

Management

- Work: Prepared (contributes to)
  - Timebox: Scheduled

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Timebox

A short, fixed time period for which a focused plan can be built to achieve a set of specified objectives and, after which, progress can be assessed and plans adapted as needed.

- Scheduled
- Planned
- Reviewed

Relates to: Work

Ref: Timeboxes as Iterations and Timeboxes in Scrum

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Progress Board

Makes the work to do and the progress in doing it visible, ideally as a big physical board in the area where the team works together.

- Progress Columns Drawn-Up
- Work Objectives Visible
- Progress of Objectives Visible
- Task-Level Progress Visible

Describes: Work

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Regular Heartbeat

A sequence of short (e.g. 2-to-4 weeks long), same-sized timeboxes is planned and executed.

This enables the team to get into a regular work rhythm. It also simplifies progress reporting, scheduling stakeholder meetings and synchronizing with other teams.

The timebox size must be right for the team and may need to be adjusted in the light of experience.

Applies To: Timebox

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SMART Objectives

SMART Objectives are:

- **Specific** – it is clear what to do
- **Measurable** – what done means
- **Achievable** – it is seen as "doable"
- **Rewarding** – it delivers value
- **Timebound** – e.g. using a timebox

Agile timeboxes are planned, tracked and assessed with SMART objectives.

Rewarding means meaningful and valuable to stakeholders, which in turn implies building new, releasable value into the product each and every timebox.

Applies To: Timebox

Captured In: Timebox Plan

Ref: SMART Acronym

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Plan a Timebox

The team is guided on the current priority objectives, and collaborates to plan the work and negotiate a viable and acceptable work plan.

Timebox: Scheduled

Coordinate Activity

3 Leadership 2 Management

Work: Prepared - Started

- Progress Board: Work Objectives Visible or beyond
- Timebox: Planned
  - Timebox Plan: Viable Plan Outlined or beyond

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Timebox Plan

Describes how the team will work to achieve the timebox objectives.

This might be captured as bullet points on flip-chart paper and then displayed near the Progress Board.

- Objectives Clear
- Capacity Estimated
- Viable Plan Outlined
- Tasks Estimated

Describes: Timebox

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Review a Timebox

Review the outcomes of a timebox, in terms of objectives achieved, and assess progress made, so that plans can be adapted as needed.

- Progress Board: Progress of Objectives Visible
- Timebox Plan: Viable Plan Outlined

Track Progress

1 Leadership 2 Management

- Work: Under Control - Concluded
  - Progress Update: Progress Analyzed or beyond
  - Timebox: Reviewed

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Progress Update

Communicates progress made in achieving objectives and/or progressing towards milestones.

Progress Data Visible

Progress Analyzed

Task-Level Effort Reported

Describes: Work

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Resources

- **SMART Acronym**: This exists in many forms: http://en.wikipedia.org/wiki/SMART_criteria. The form used in this practice is from **The Project Management Pocketbook**, by Keith Posner and Mike Applegarth (Laurel House 1998).
- **Timeboxes as Iterations**: Development timeboxes are also called iterations, see for example **Managing Iterative Software Development Projects**, by Kurt Bittner and Ian Spence (Addison-Wesley 2006).
- **Timeboxes in Scrum**: Scrum calls development iterations 'Sprints', see http://www.scrumguides.org/scrum-guide.html#events-sprint.

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Daily Stand-Up Essentials

Use short, daily whole-team meetings to coordinate the work of the team and raise impediments.

Impediment | Hold a Daily Stand-Up | Round-Robin Stand-Up | Board-Driven Stand-Up | Resources

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Impediment

Something that is preventing or slowing productive progress.

Raised

Owned

Resolved

Relates to: Work

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Hold a Daily Stand-Up

The team meets every day, same time and place, to assess progress, coordinate activity, and raise and action impediments. The meeting is timeboxed, typically to 15 minutes.

- Impediment

Coordinate Activity

1 Leadership 2 Management

- Work: Under Control (contributes to)
  - Impediment: Owned or beyond (All Impediments)

Ref: Daily Stand-Up

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Round-Robin Stand-Up

A round-robin approach ensures that everyone has a chance to speak. The team usually gathers around the progress board. Each team member speaks in turn and answers three questions:

1. What did I do yesterday?
2. What am I doing today?
3. What are my impediments?

Actions to remove Impediments are agreed and owned, but longer discussion points are off-lined until after the whole-team meeting.

Alternative To: Board-Driven Stand-Up
One Way To: Hold a Daily Stand-Up
Ref: Round Robin Stand-Up

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Board-Driven Stand-Up

Use the progress board to drive the stand-up. Visit in-progress items in priority order, starting with the top priority ones closest to being done. Focus on what needs to happen to move the item towards completion.

Everyone should provide an update because all work should be on the board, but a quick round robin *"any other business"* at the end ensures everyone gets to speak and flushes out any work being done that is not on the board.

Alternative To: Round-Robin Stand-Up
One Way To: Hold a Daily Stand-Up

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Resources

- **Daily Stand-Up**: The daily stand-up meeting is one of the most common agile team practices, see https://www.agilealliance.org/glossary/daily-meeting/.
- **Round Robin Stand-Up**: Scrum calls the daily stand-up the 'Daily Scrum' and recommends the round-robin 'three-question' approach, see http://www.scrumguides.org/scrum-guide.html#events-daily.

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Agile Retrospective Essentials

Make incremental improvements to the way of working through regular, repeated retrospectives.

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Mad, Sad, Glad

A popular approach to team brainstorming to identify potential improvements.

Team members write on sticky notes what has made them:

- *Mad* – frustrations
- *Sad* – disappointments
- *Glad* – things that went well

Part of its power is that it taps into people's emotions, and results in an unfettered flow of ideas that the team can then analyze, prioritize and action.

One Approach To: Hold a Retrospective
Ref: Mad, Sad, Glad

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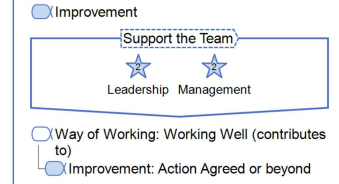
Hold a Retrospective

The whole team meets regularly to reflect on its way of working. Improvements are identified and prioritized, and actions agreed. At the next retrospective, the results are evaluated.



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Improvement

A possible adaptation to improve a Team's Way of Working.

- Identified
- Prioritized
- Action Agreed
- Trialed
- Results Evaluated
- In Use

Relates to: Way of Working

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Resources

- **Agile Retrospectives**: See **Agile Retrospectives: Making Good Teams Great**, by Esther Derby and Diana Larson (Pragmatic Bookshelf 2006).
- **Mad, Sad, Glad:** This is a popular retrospective of unknown origin. See http://retrospectivewiki.org/index.php?title=Glad,_Sad,_Mad.
- **Retrospectives Wiki:** See http://retrospectivewiki.org/index.php?title=Main_Page.
- **Scrum Retrospectives**: See http://www.scrumguides.org/scrum-guide.html#events-retro.

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