



AGILE CHANGE
management limited

Agile for Project and Programme Managers

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Introduction

I am involved in a mixture of assignments for different organisations across Europe and the Middle East. My work includes establishing a portfolio management function, creating a change management methodology and coaching a board of directors through a transformation of their organisation to become more customer focused.

The thread that connects all of my work is an underlying desire by these organisations to become more agile. This desire to be 'agile' means different things to different people, but there are some common themes:

- To waste less time talking, planning and documenting projects so that more time can be spent on getting something done that others can notice.
- Earlier demonstration of the idea in some tangible form, so that there is a feeling that something can be done, and that some progress has been made.
- Creating a 'task force' style of management, where a team can be assigned to a particular issue, leading to a faster response.

Agility is a response to a number of factors that are affecting the business environment:

Pressure to deliver before things change

Customers continually evolve their demands for what they want from their suppliers, regulators issue new demands for compliance and competitors continue to innovate. For all of these reasons, there is perception that there is no time to waste. The requirement to 'deliver now, and if it doesn't fit with the market place, deliver something else' is becoming a prevailing feature of many meetings.

Pressure to act on the volume of ideas and requirements identified internally

A constant theme in the organisations I work with is the huge number of ideas for new projects, enhancements to existing systems, new ways of working to streamline and simplify processes and the need to do more with the same or less resources. To cope, many people want the satisfaction of knowing that they have at least tackled some of this, so they look for completion of at least one improvement or change.

Different flavours of agile

There are a number of different approaches to agile that have been established over the last few years:

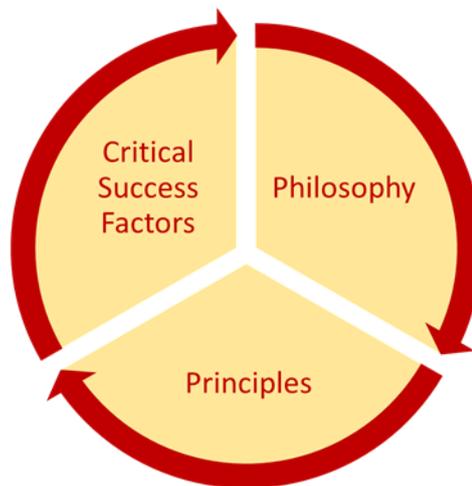
Scrum – this is a term that is frequently used to describe any kind of fast paced development where there is minimum documentation and the team decides what work to do in each 'sprint' which is focused period of time during which they are going to create something that they can deliver to a customer. This approach is supported by the Scrum Alliance and the Agile Alliance, not for profit organisations who spread the word about the benefits of an agile style of working.

AgilePM® – this is an approach owned by the DSDM Consortium, another not for profit organisation that shares ideas about best practice agile approaches. AgilePM is an approach that explains how to run a project using agile concepts. It is described in a handbook which is the set text for the qualification based course that was launched in 2010.

Benefits of the Agile Project Management course

As its name suggests this course looks specifically at the application of an agile approach to project management. It comprises the agile philosophy, a set of principles and critical success factors and a project lifecycle built upon these principles.

It is the philosophy, principles and critical success factors that demonstrate what is needed to be agile and which combined provide the detail behind the concept of agile that is so important.



The philosophy states:

"Best business value emerges when projects are aligned to clear business goals, deliver frequently and involve the collaboration of motivated and empowered people"

'Business value' means we have to be clear about what we should be getting out of doing the project. It is the reason all of the hard work and effort is going to be worthwhile. Making this core to the philosophy of agile project management makes this philosophy applicable to all types of work, not just projects. In an age of uncertainty when there are so many possibilities and opportunities it provides the criteria for making the right decision about what to do. Only work that can clearly be shown to deliver additional value internally or for customers is undertaken.

'Deliver frequently' makes it clear that speed and timeliness are important aspects of getting the work done. The emphasis on frequent delivery means that everyone is encouraged to get their work out to customers as soon as possible,

with the caveat that if there are missing features and functions, these will be added in the next delivery. This supports the emphasis on 'let's get something done' which is so important in fast moving environments.

The principles build upon this philosophy, identifying the requirements to deliver on time, deliver iteratively and to work collaboratively with customers to get their feedback and build upon each delivery with more features and functions.

The critical success factors address the environment needed to work in an agile way, stating the importance of support for this timely, frequently delivery and the close involvement by those impacted by the project deliverables in their creation and testing.

All of these ideas help to create an effective agile working environment, whatever the type of work we are doing.

Agile Project Lifecycle delivers a structured approach to agile working

The Agile Project Management approach includes an end to end project lifecycle that moves from initial idea through to post project activities.



I think the project lifecycle is really valuable because, as with the philosophy, it is applicable to all sorts of work and not just to projects. The lifecycle provides an excellent framework for development of any new initiative because it ensures that important concepts are addressed:

- Benefits management – at every step of the lifecycle, there is consideration of what the benefits of the work are, how they are to be achieved and how they should be measured.
- Quality management – consideration of the level of quality, the assignment of responsibilities for creating and checking the level of quality and how quality will be achieved are embedded in the lifecycle.

Applying the Agile Project Lifecycle

To demonstrate how useful the Agile Project Lifecycle is, I have described some of the key concepts and how I apply them to other work.

Integrating project and change management

The Agile Project Lifecycle does not simply provide a process for creating project deliverables. It provides a mechanism for managing an integrated project and change initiative. The lifecycle places as much importance on deployment or

implementation of the project deliverables as it does to their creation. So already I am a big fan because I don't believe we can call ourselves project professionals unless we take an active part in deployment which leads to changes in ways of working which leads to the realisation of the benefits that the project promised to deliver as part of the business case.

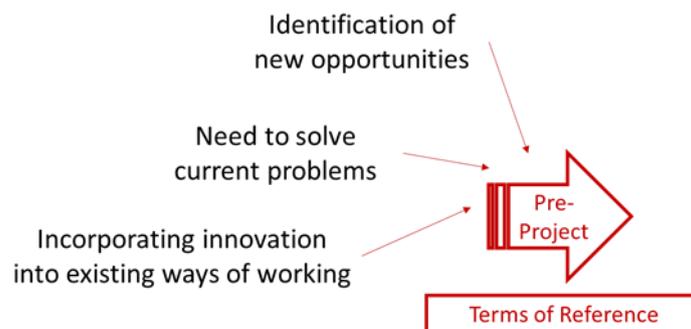
This integration of project tasks and change management activities has implications for the portfolio of projects and programmes. Most importantly it helps to correctly size the work because it recognises the need to prepare the business for new ways of working:

- Creation of new processes and procedures
- Design of new templates and checklists
- Identification of new measures of success
- Training in the new ways of working
- The time needed to practice new ways of working so that they become the new norm

This correct sizing of the work enables the projects to be appropriately scheduled in the portfolio. After all, naively recording projects by their start and end dates ignores the significant amount of time required to adopt new ways of working. It creates a false sense of capacity for further projects when in reality resources are tied up implementing the deliverables from current projects.

Benefits of the pre-project process

The only deliverable from this first step in the lifecycle is the Terms of Reference. This defines the objectives of the project and the rationale for undertaking it. I think it's important not to see this as the first document in the lifecycle but as the culmination of many conversations that have happened, possibly over a number of months. I view it as a summary of the innovation process that has concluded with a request for a project.



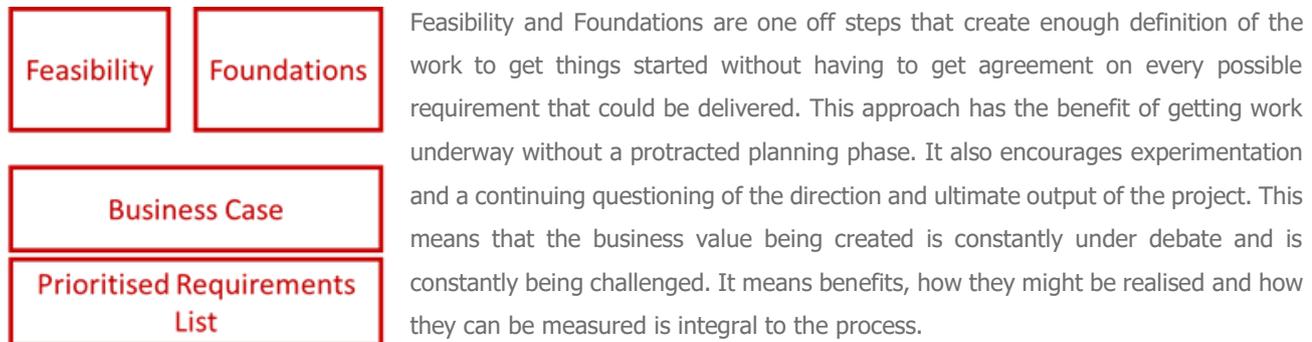
The need to create a Terms of Reference brings attention to the innovation process. For me, creating an agile approach involves explicitly defining all of the activities that lead to project ideas so that everyone involved can identify their role. This addresses the danger that anyone involved in creating or implementing project deliverables are merely recipients of the Terms of Reference. This ignores all of their specialist knowledge which can be used to help shape the ideas and correctly scope the work before it becomes an expectation with a timetable attached.

Benefits of Feasibility and Foundations

The next steps are Feasibility and Foundation which can be conducted as two consecutive processes for larger projects or combined to form one preparation step for smaller initiatives.

The important aspect of these processes is the clarification of the business value to be created by the project. It is this understanding which enables all subsequent requirements, additions and amendments to be prioritised against. This concept applies to all aspects of work whether the lifecycle is being applied to strategy creation, business development or project management.

Agile approaches use a Prioritised Requirements List or Product Backlog as the main record of all the work involved in the project. This is more important than the project plan because it summarises at any time what needs to be done to deliver the most value because it is prioritised, sub divided into Must Have, Should Have and Could Have items.



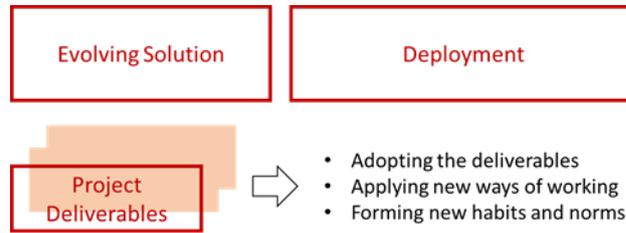
Benefits of the Evolving Solution



The evolving solution also encourages experimentation through the emphasis on iterative development. There is no blueprint for creating things that have never been created before so doing a little bit of work and regularly asking if it is right, if it is what the customers need and if there are any other requirements is a sensible approach which is applicable to all sorts of work, not just projects.

To become agile, this process has to be repeatable, stopping when the cycle of work has produced something that can be delivered, and then starting again to produce the next idea.

Benefits of Deployment



The delineation of Deployment as a separate phase gives important emphasis to the transfer of project deliverables into operational use. After all, if they don't become part of how work is done they cannot generate improvements and realise benefits.

I am so pleased to see this requirement for implementation included as a specific step in a lifecycle model because it gives these activities a spotlight, as they are too often ignored. There is a view that how something is used will magically be worked out once the deliverables are put in front of people. That does happen, but it happens in their time frame, and because they are busy people that leads to delays between having things ready for use and them actually being used. At the same time it helps to create a belief that projects are being 'done to' people and that the project deliverables are not useful, but just another problem that needs to be addressed. By identifying up front all of the activities needed to unpick current ways of working and create new ways that incorporate the project deliverables everyone benefits. The project team can see their work is making a difference and those that are using these deliverables don't feel they have been dumped upon.

Deployment is a repeatable phase, following on from the Evolving Solution, taking place each time a usable piece of work has been created. This creates a drip feed of ideas, allowing people affected by the work to get used to elements of the new way of working as soon as they are available, instead of having to wait for everything to change all at once at the end of the project.

Benefits of Post Project

I couldn't finish without commenting on this last process. There is only one suggested output from this process, which is a Benefits Review. The opportunity to measure what has been achieved as a result of the project, tying it back to the original philosophy, which is that the work should not have been undertaken unless there was a clearly defined value to it.

Conclusion

There are lots of books and articles about how to be 'agile'. The reason that I enjoy teaching the content of the AgilePM approach from the DSDM Consortium is because it provides a detailed approach, with activities, information and suggested documents that give people lots of ideas about how they might use them. This information is not as easily available in other approaches, which often talk about the behaviours needed to be more agile but don't give details of the structures and processes required to make this a reality.

Melanie Franklin has a track record of excellence in project, programme and portfolio planning and delivery. In recent years she has focused on helping organisations move from waterfall to agile project management approaches in response to the increasing need to deliver projects on a shorter timescale.

Creating agile environments has grown in importance in recent years, and many executives are driving this adoption as they become aware of the benefits of agile thinking in responding to fast moving changes in the international business environment.

She is a respected author of 8 text books about project and change management. Her most recent book, 'Agile Change Management' proposed an approach to managing change initiatives that apply the principles of agile project management. This ensures that while the exact deliverables from a change initiative can evolve in response to customer, regulator market demand, project deadlines are still respected.

Melanie believes in authentic leadership, therefore, as well as using her training skills to develop the skills and knowledge of attendees on her courses, she also ensures she attends training to build her own skill set. Melanie is an accredited trainer in AgilePM and is a Certified Scrum Master and LeanKanban Practitioner. She is also an accredited trainer in Change Management, an examiner for the APMG Change Management Foundation and Practitioner qualifications and the Co-Chair of the Change Management Institute UK.

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