Five Key Project Management Activities
Strategic Planning, Organizational Commitment & Collaboration, Preparation, Execution, and Evaluation

I. Strategic Planning
1. Strive to be more Agile, rather than simply following Agile methods and steps. This approach encourages adoption of the philosophy, or mindset, rather than specific steps. This is also referred to as being Agile, or having agility versus using it.

2. Allow for a gradual migration to Agile appropriate to your readiness. Migration steps might include combining Agile and existing methods, conducting pilots, and preparing technical infrastructure.

3. Observe and communicate with other organizations implementing Agile. For example, those starting to use Agile can consult with others who have more experience, including academic, private sector, and federal practitioners.

4. Follow organizational change disciplines, such as establishing a sense of urgency and developing a change vision. A clear vision of change helps staff understand what the organization is trying to achieve. Also develop communication strategies.

5. Be prepared for difficulties, regression, and negative attitudes. This approach reinforces that Agile is not painless and users may backslide to entrenched software methods.

6. Start with Agile guidance and an Agile adoption strategy. This practice advocates having these elements in place at the start, even if they must be copied from external sources.

II. Organizational Commitment and Collaboration
1. Ensure all components involved in Agile projects are committed to the organization’s Agile approach. Encourage everyone to contribute and build commitment to the organization’s approach. Include those working directly on the project and others, such as sponsors.

2. Identify an Agile champion within senior management. This persons should have authority to advocate for the approach and resolve impediments.

3. Ensure all teams include coaches or staff with Agile experience. This practice stresses the importance of including on each team those with direct experience in
applying Agile. While training is helpful, hands on experience helps the team members learn and adjust.

4. **Empower small, cross-functional teams.** Empowered teams of 7 to 18 people decide what to deliver and how to produce it. The teams should not over-rely on one member’s skills.

**III. Preparation**

1. **Train the entire organization in your Agile approach and mindset, and train Agile practitioners in your Agile methods.** For example, managers must understand the approach so that they know how it will affect them and teams need to know the specific steps of an iteration to conduct it properly.

2. **Ensure that subject matter experts and business team members have the required knowledge.** This practice stresses that staff involved in fast-paced iterations must truly be experts in the processes being automated in that iteration in order to reduce delays. For example, a team member representing financial customers must be fully familiar with the needs of those customers.

3. **Enhance migration to Agile concepts using Agile terms and examples.** For example, use terms like user stories instead of requirements, and Agile Center of Excellence instead of Project Management Office. Provide examples, such as one illustrating the small scope of a user story to teams writing these stories.

4. **Create a physical environment conducive to collaboration.** A common practice is to co-locate the team in a single room where they can continually interact. Other ways to enhance collaboration are to reorganize office space and use tools to connect remote staff.

5. **Identify measurable outcomes, not outputs, of what you want to achieve using Agile.** An example of this practice is creating a vision statement of project outcomes (such as a decrease in processing time by a specific percent in a set time), rather than outputs (such as the amount of code produced).

6. **Negotiate to adjust oversight requirements to a more Agile approach.** This practice notes that teams may be able to adjust oversight requirements by using frequent, tangible demonstrations to gain the trust of reviewers and investors, potentially reducing the need for more formal oversight documents.

7. **Ensure that the definition of how a story will be determined to be done is comprehensive and objective.** Comprehensiveness includes defining what
constitutes a finished product (i.e., packaged, documented, tested, and independently verified). Objective means measurable or verifiable versus subjective judgment.

8. **Make contracts flexible to accommodate your Agile approach.** Contracts requiring waterfall-based artifacts and milestone reviews may not support the frequent changes and product demonstrations in iterations, and may inhibit adoption.

### IV. Execution

1. **Use the same duration for each iteration.** An example would be establishing that iterations will be four weeks each within a release to establish a uniform pace.

2. **Combine Agile frameworks such as Scrum and XP if appropriate.** Disciplines from different frameworks can be combined. For example, use project management disciplines from Scrum and technical practices from XP.

3. **Enhance early customer involvement and design using test-driven development.** Test-driven development refers to writing software code to pass a test. This practice maintains that involving customers in these tests helps to engage them in the software development process.

4. **Include requirements related to security and progress monitoring in your queue of unfinished work (backlog).** Including activities such as security reviews and status briefings in the backlog ensures their time and cost are reflected and that they are addressed concurrent with, and not after, iteration delivery.

5. **Capture iteration defects in a tool such as a backlog.** This practice calls for queuing issues so that they are resolved in later iterations. For example, lists of unmet requirements generated at end-of-iteration demonstrations should be queued in the backlog for correction in a future iteration.

6. **Expedite delivery using automated tools.** For example, tools can track software modifications, and compliant development sites or “sandboxes” help customers conceptualize the software in an environment that meets architectural and security standards.

7. **Test early and often throughout the life cycle.** The theme of this practice is that testing during software code delivery instead of after delivery reduces risk and remediation costs.

### V. Evaluation
1. **Obtain stakeholder/customer feedback frequently and closely.** For example, feedback is obtained during the iteration and at its completion at an iteration retrospective. This practice was linked to reducing risk, improving customer commitment, and improving technical staff motivation.

2. **Continuously improve Agile adoption at both the project level and organization level.** Invoke the discipline of continuous improvement, looking for ways to improve. For example, improvements can be made by adding automated test and version control tools, and enhancing team rooms. These issues can be tracked in project and organizational-level backlogs.

3. **Seek to identify and address impediments at the organization and project levels.** Encourage frank discussion about impediments so that they can be addressed.

4. **Determine project value based on customer perception and return on investment.** This practice recognizes that tracking progress only against cost or schedule criteria set before the project began could lead to inaccurate measurement of progress if, for example, major changes in scope occur. Instead, Agile encourages customer feedback as one measure of progress. Comparing solution value to the cost of the solution is also a gauge of success.

5. **Gain trust by demonstrating value at the end of each iteration.** This practice includes demonstrating key requirements in early iterations, and showing customers that requirements in the backlog are delivered and not forgotten.

6. **Track progress using tools and metrics.** Progress can be tracked using tools and metrics such as burn-down charts and velocity, which can be automated, and by success indicators such as “customer delight,” and reduced staff stress and overtime.

7. **Track progress daily and visibly.** This practice stresses that status is checked daily and publicly. For example, a progress chart is posted openly in the team's workspace, with timely revisions to reflect ongoing feedback.