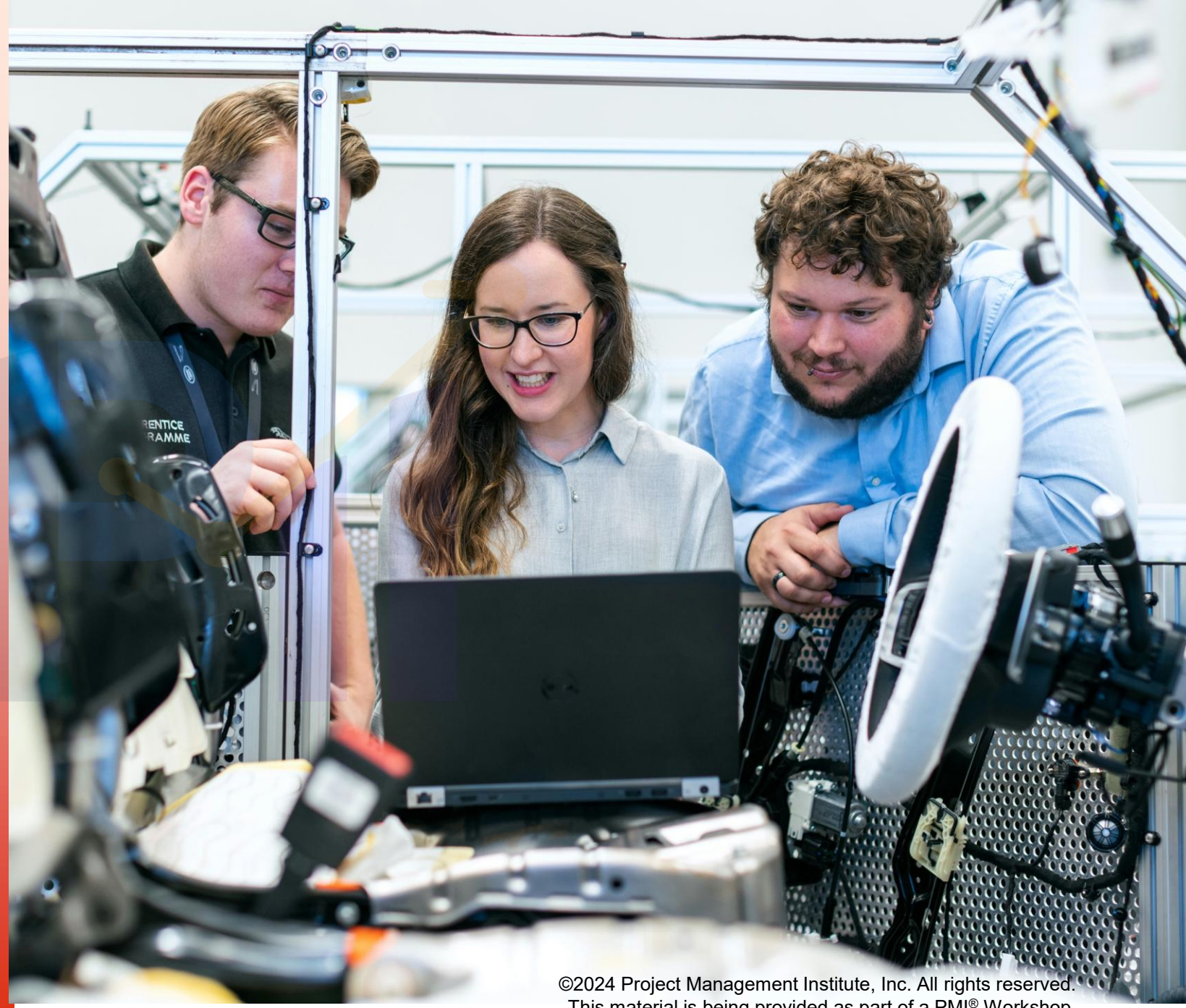
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LESSON 8

Adaptive Approaches

Planning Change-Based Approaches to Projects

Version 2.0 | June 2024 Release



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In This Session:

8A Foundation and Considerations for Adaptive Projects

8B Typical Steps in an Adaptive Project

8C Requirements in Adaptive Approaches

8D Plan Releases and Iterations

8E Adaptive Approaches or Frameworks

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8A Foundation and Considerations for Adaptive Projects

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About Agile

It's a **mindset** or **way of thinking and being** based on four values and 12 principles in the *Agile Manifesto*.

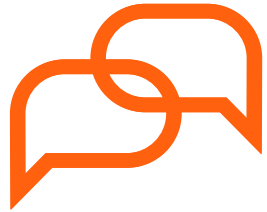
"Agile" also describes a set of **more than 50 project management approaches**



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The Agile Manifesto for Software Development

- Project development teams learned “better ways of developing software by doing it”
- We value the items on the left **more** than the items on the right



We value:

- **Individuals and interaction** over process and tools
- **Working software** over comprehensive documentation
- **Customer collaboration** over contract negotiation
- **Responding to change** over following a plan

“The Agile Manifesto.” (2001). www,agilemanifesto.org

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The Agile Mindset and Adaptive Team Culture

- Team members are **T-shaped, generalizing specialists**
- Teams **self-organize** to distribute work
- Everyone is a **servant leader** in a **nonhierarchical team**

- **Conflict** is part of a culture built on **trust** and **psychological safety**
- **Agile ceremonies** build in opportunities for planning, controls, reflection, and learning

adaptability

customer-centricity

consensus-driven

transparency

resilience

collaboration

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Agile Ceremonies: Overview

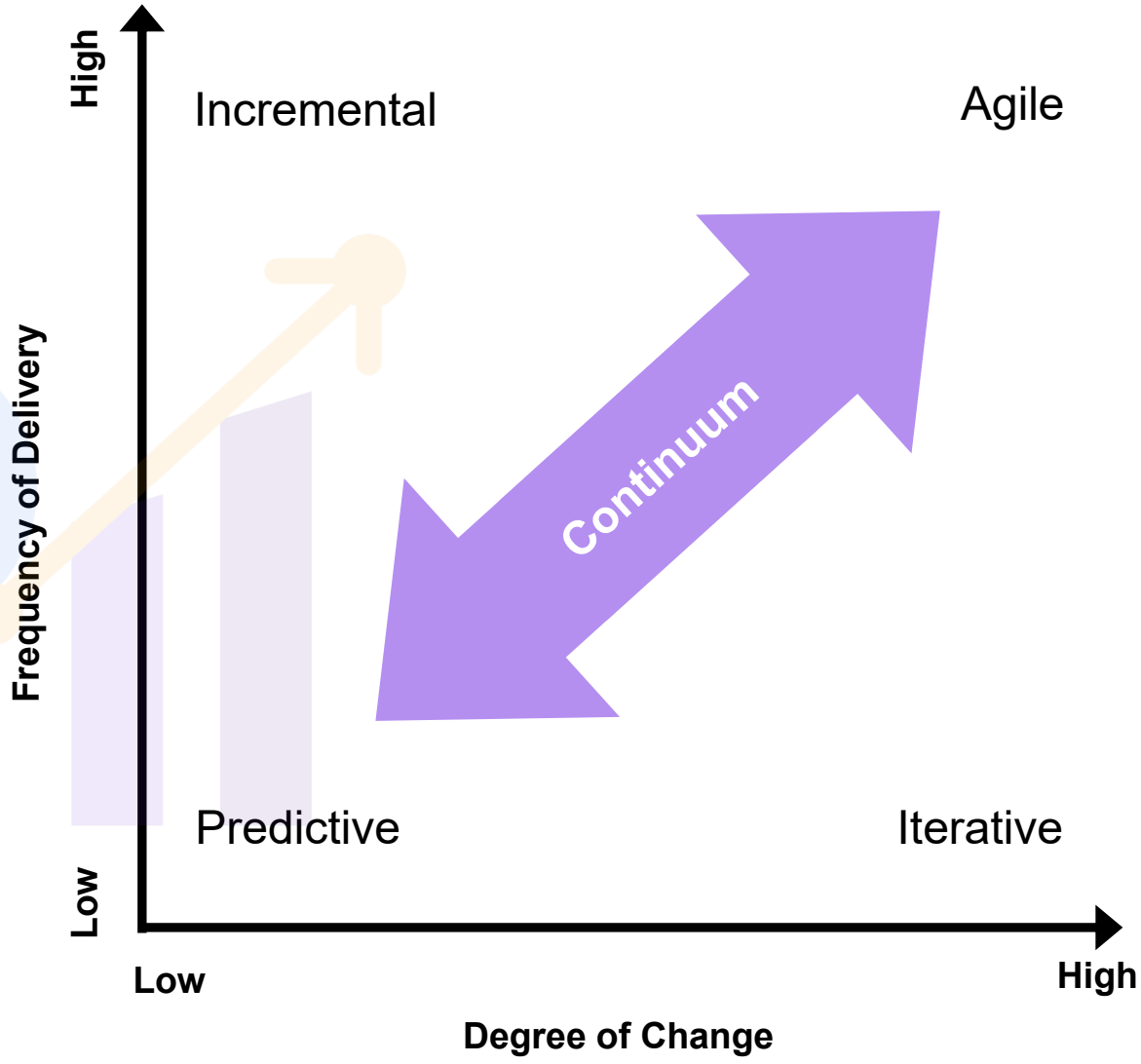
Ceremony	When	What/Why	Who
Daily Standup **Daily Scrum** **Daily Coordination**	Each workday for 10–15 minutes	3 topics for each person: • What I did yesterday • What I'm going to do today • Any blockers	• Team self-organizes • Team lead may facilitate
Iteration/ Sprint Planning	Start of each iteration or sprint	Plan iteration backlog	• Run by/for project team • Product owner and key stakeholders may attend
Iteration/ Sprint Review (Demo)	End of each iteration or sprint	Review developed product increment	Team, product owner, invited customers and stakeholders
Retrospective	End of iteration or project	Reflect on what went well, what can be improved	• Team self-organizes • Team lead may facilitate

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Agile Life Cycles

Iterative life cycle—*An approach that allows feedback for unfinished work to improve and modify that work*

Incremental life cycle—*An approach that provides finished deliverables that the customer may be able to use immediately*



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Cadences

***Cadence** refers to the rhythm of activities conducted throughout a project*

Continuous flow refers to a Lean-based adaptive development approach that keeps work flowing continuously through a timeline to reduce waste and improve efficiency

- Break down work into small, manageable pieces
- Use a **kanban board** to visualize and move work continuously and reduce time work spends waiting in queues

Timeboxed or iterative refers to use of **iterations or sprints—***A timeboxed cycle of development on a product or deliverable in which all the work needed to deliver value is performed*

Typically, a sprint is two weeks

Use of ceremonies install and regularize communication and collaboration

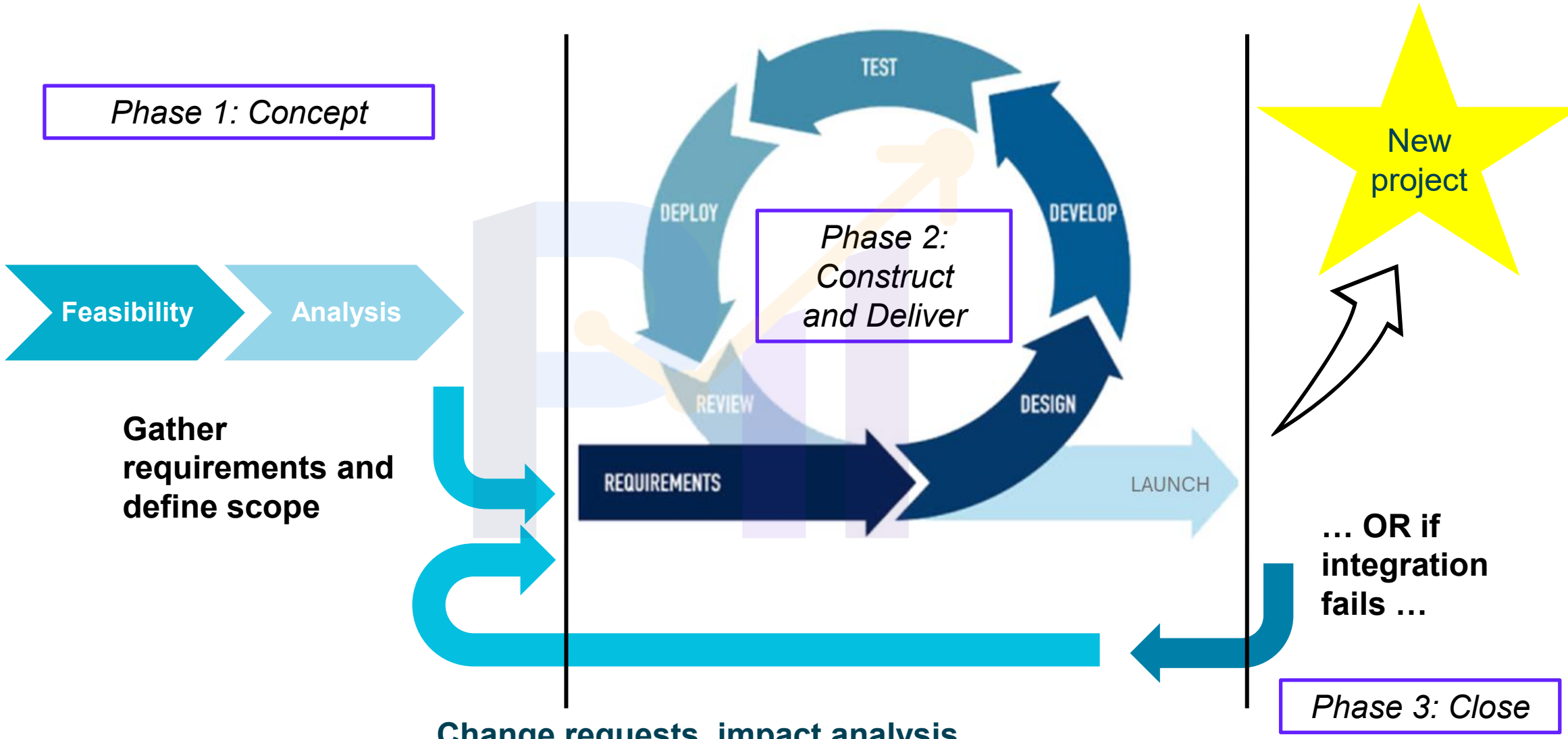
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8B Typical Steps in an Adaptive Project

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Adaptive Life Cycle Example: Software Development



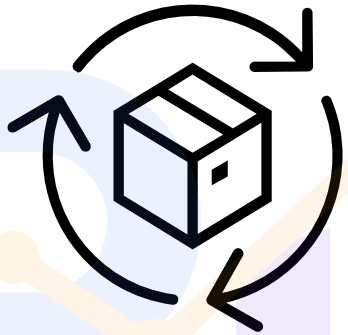
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Adaptive Project Stages



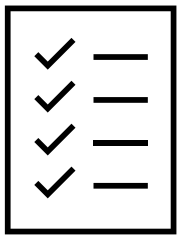
Concept

Vision statement
Product roadmap
Project management plan



Construct and Deliver

Release plan
Product backlog
Project execution
Monitoring



Close

Close iteration
Close project

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Concept Stage

Vision statement—*A summarized, high-level description of the expectations for a product such as target market, users, major benefits, and what differentiates the product from others in the market*

Product roadmap—*A high-level timeline that depicts milestones, significant events, reviews, and decision points*

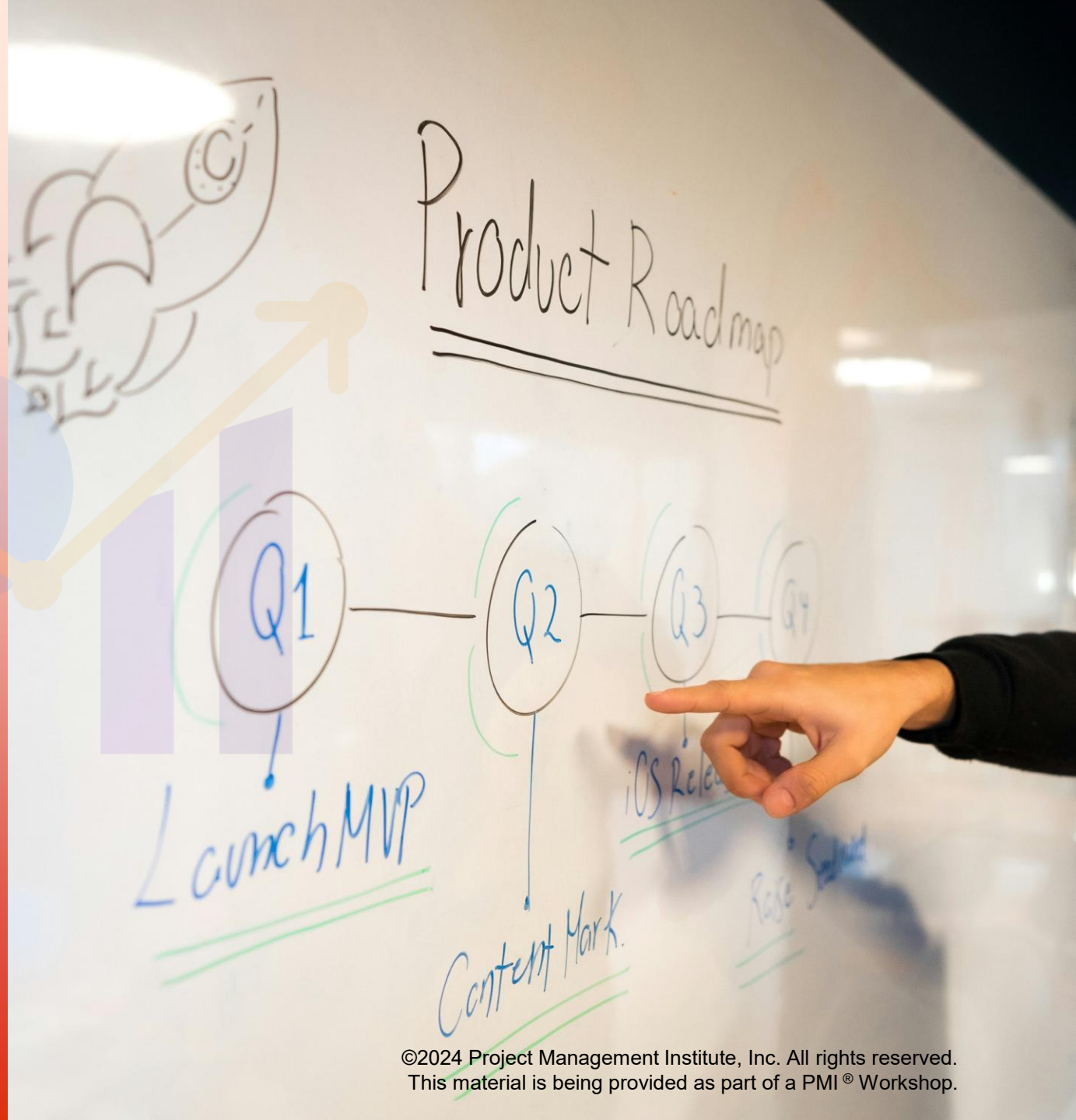
Project management plan—*This can be a lightweight version*



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Product Roadmap

- Based on the **vision statement**
- Responsibility of the product owner
- Includes the anticipated sequence of deliverables or releases over time
- It's flexible!—Team uses roadmap as a guide for daily work and to explore product functionality



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Construct and Deliver Stage

- Release planning—create story maps, prioritize the **backlog**
- Project execution—plan **iterations** or **cadence,** collaborate with stakeholders in **feedback loops**
- Monitor work and changes—use project controls



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Closing Stage

Close phase or project

- Conduct **retrospectives** for each product and process
- Determine whether the deliverables achieved the intended benefits, value, and vision



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Project: Deliver a Website



But now … the project sponsor wants to make a few changes …

- Users should be able to browse and pay for leadership workshops online
- But **new payment options** will include **digital currency and PDCs**—so members can trade in the credits they earn for more workshops
- And **real-time translation using artificial intelligence (AI)** in the customer service chat to serve the organization's global users

While the team agrees these are all great features, but they are concerned about delivering the added complexity.

What should they do?

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Why Use an Adaptive Approach?



An organization wants to redesign their website using the executive team's product vision:

- Users can browse and pay for leadership workshops online
- Payment includes digital currency and professional development credits (PDCs)
- Integrate AI for real-time translation in customer service chat

The project team decides to adapt and use an adaptive approach instead.

Which three statements support the team's choice of an adaptive approach? (Select 3.)

a. Software development projects should always use an agile development approach.
b. Use of new technology and innovative payment options present complexity.
c. Because the executive team is the project sponsor, the project requires careful risk planning.
d. The team may deliver value more quickly using an agile approach.
e. Frequent customer feedback will be essential for ensuring product quality.

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8C Requirements in Adaptive Projects

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Business Analysis for Adaptive Approaches

- Create **use case** > Describe **features** > Write scenarios
- **User stories** are the primary medium of stakeholder requirements
- Judge fulfillment of user stories with **acceptance criteria** and **definition of done (DoD)**
- **Prioritize** user stories on a **product backlog**
- Use a **release plan**



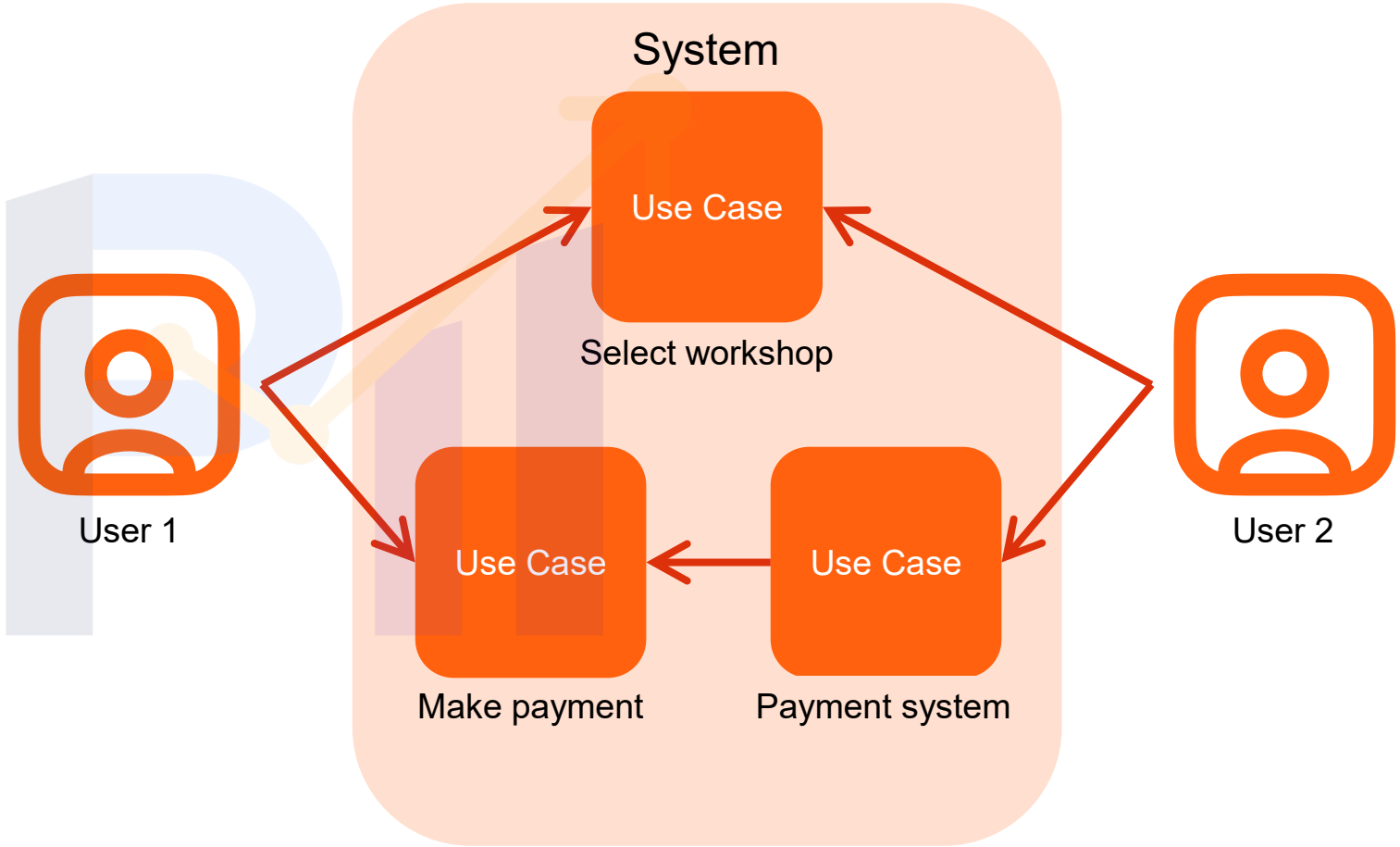
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Use Case Diagram

Graphical

An artifact for describing and exploring how a user interacts with a system to achieve a specific goal

Project: Create a global multilingual website to sign up and pay for leadership workshops using several payment options



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Use Case Narrative

Why would you choose the narrative form of a use case instead of the graphical format? Give a specific scenario.



Use Case ID	1
Name	Select workshop
User	Conference attendee (customer)
Description	Conference attendee searches and finds a suitable session or workshop to attend
Organizational benefits	Successful registration generates revenue and professional development opportunities for the institution and members and promotes visibility
Preconditions	Attendee has already logged in to the website using a valid email
Postconditions	Participation confirmation email is sent to the customer

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User Story

A brief description of an outcome for a specific user, which is a promise for a conversation to clarify details

As a(n) <WHO/user>,

I want to be able to <DESCRIBE FUNCTION> so that I can <DESCRIBE BENEFIT>.



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User Story Criteria

Apply the INVEST acronym to create user stories that can enable the development team to work

Independent—Each user story is unique

Negotiable—Changeable or adaptable

Valuable—Defines valuable functions or features

Estimable—Clear enough so the team can estimate effort

Small—Right size for implementation during an iteration

Testable—Independently verifiable

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Judging Fulfillment of User Stories

- Create clear **acceptance criteria** in collaboration with the customer to ensure everyone agrees
- A **definition of done (DoD)** checklist helps the team understand when their work is complete



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Acceptance Criteria Example

A set of conditions that is required to be met before deliverables are accepted

Acceptance criteria are unique to a user story

User Story

As a [**customer**], I want to [**be able to search leadership courses and workshop events**] so that I can [**identify sessions of value**].

User

Desired function or action

Benefit

Verify Acceptance Criteria

Potential customers can:

- Search for events
- Search by topic or date
- See all matching results from a search
- Add a selected session to the shopping cart

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Definition of Done (DoD)

A team's checklist of all the criteria required to be met so that a deliverable can be considered ready for customer use

Use DoDs for user stories, releases, or final output

- ✓ **Developed**—Did we finish working on it?
- ✓ **Unit Testing**—How the product/service/update perform during testing?
- ✓ **Acceptance Testing**—Did the customer test it?
- ✓ **Documented**—Have we included technical documentation—e.g., specifications for use?
- ✓ **Signed Off**—Did the authorized person for the customer/organization approve?

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Maintain Alignment of Requirements/User Stories with Solution and Value Delivery

- Product owner prioritizes and refines the backlog to keep work aligned with stakeholders and vision
- Product owner uses project artifacts to manage requirements
- Team executes work and implements product feedback iteratively



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Artifacts Used to Manage Project Requirements

- Product roadmap
- Story maps
- Product backlog
- Wireframes



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Product Roadmap Contents

Strategy
- How the product supports organizational strategy

Portfolio
- Relationship of product to the portfolio and other products in the portfolio

Initiatives
- Overview of projects under consideration or currently in development related to this product

Vision
- Explanation of intended customers and how needs can be met—linked to solution and why it's being developed

Success criteria
- Metrics to determine solution success

External market
- Any external market forces that influence or shape product development

Product releases
- Expected product releases and themes with high-level features included

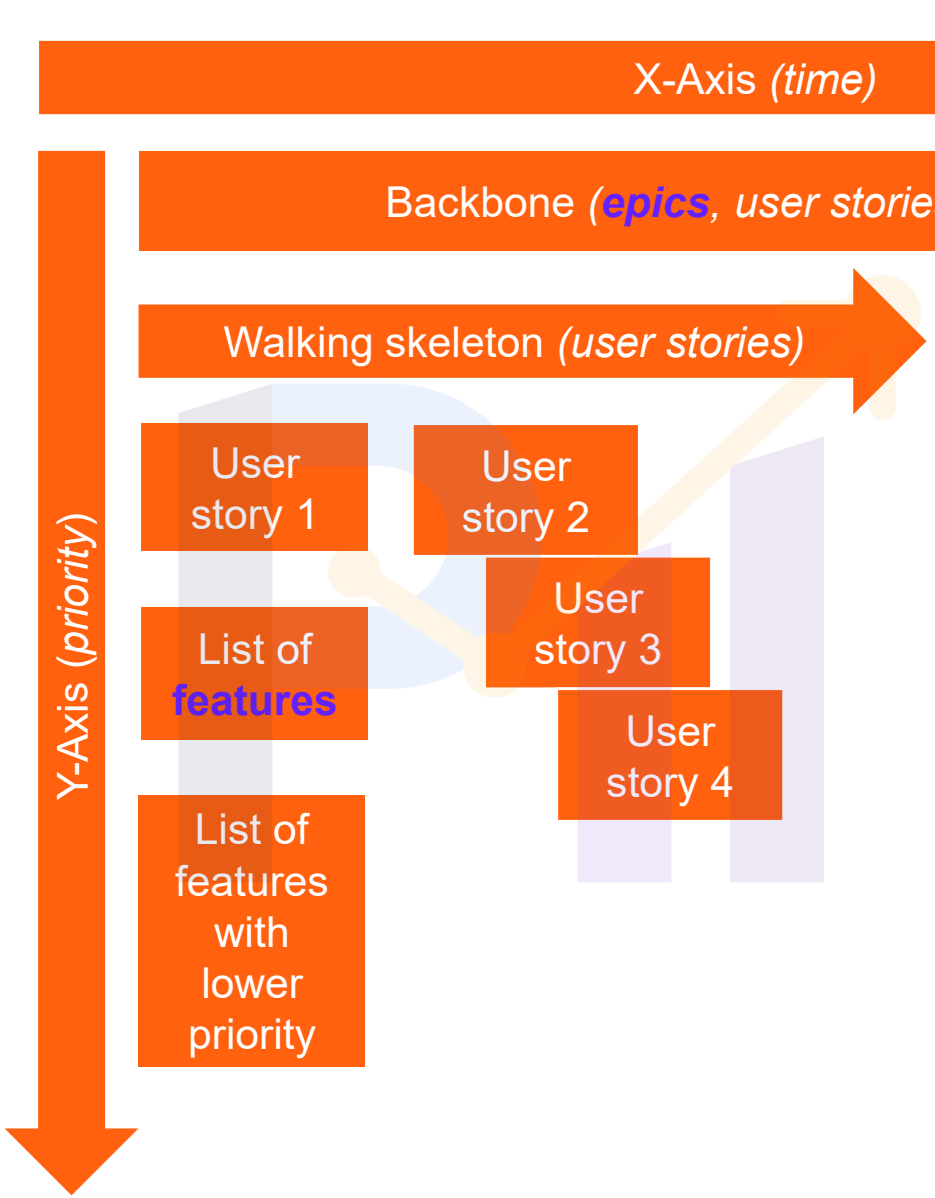
Features
- Product capabilities paired with releases; features are typically prioritized

Timelines
- Delivery schedule for feature sets

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Story Map

A visual model of all the features and functionality desired for a given product, created to give the team a holistic view of what they are building and why



Epic—A block of work with one common objective, such as a **feature**, customer request, or business requirement

Feature—A group of stories that delivers value to the customer

A **release** refers to the partial or full release of a solution into a production environment while the development team or operations is still responsible for it

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Translating Between Predictive and Adaptive Planning

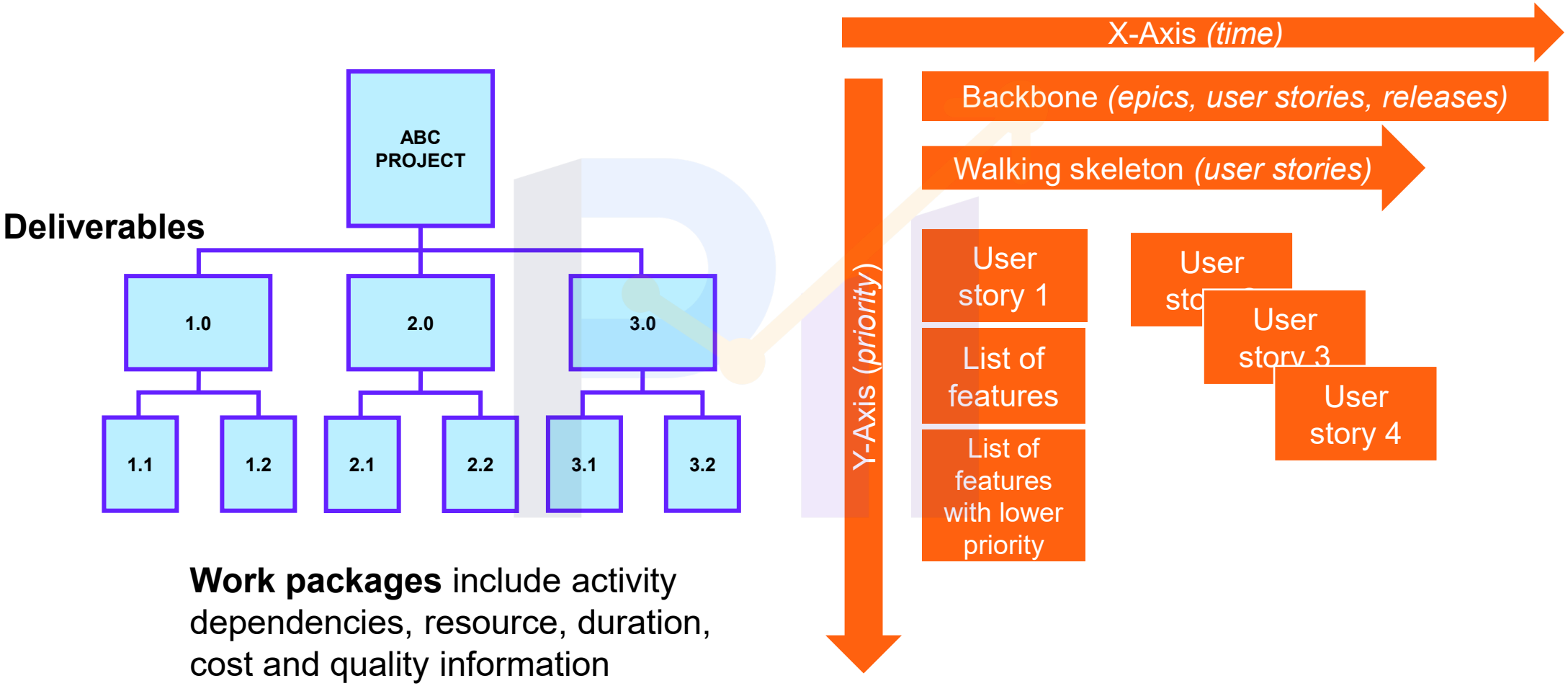
There is no equivalency between planning predictive and adaptive approaches

But, we can make correlations!

Use a decomposed a **WBS**	To create a **product backlog** or release plan using similar **themes**
Larger WBS deliverables	Could be **Epics** or **iterations/sprints**, depending on size and complexity
Smaller WBS deliverables	Could be **Features**
We could examine the information in work packages	To create user stories and plan iterations
Examine dependencies at the work package level	To build epics and stories
Think about how the WBS could already be incremental (scope elaboration)	Each increment could be developed using iterations

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Visual Correlations of Predictive and Adaptive Planning



Work packages include activity dependencies, resource, duration, cost and quality information

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Backlog



An ordered list of work to be done

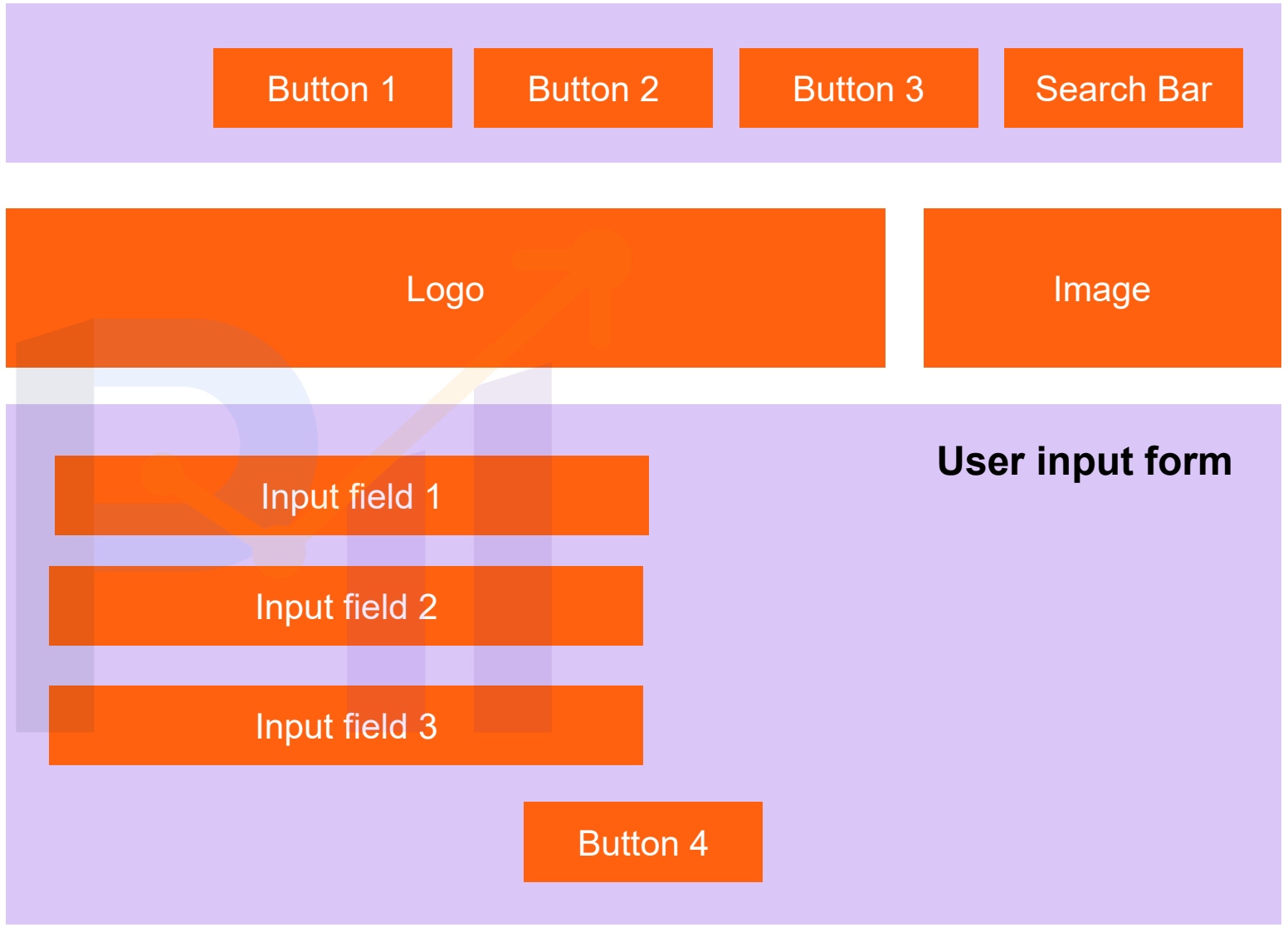
A project has a product backlog, iteration backlogs, and sometimes release backlogs

- A **business analyst and/or product owner** creates a **product backlog** in collaboration with stakeholders
- **Product backlog items (PBIs)** describe desired product functionality through **user stories**
- The product owner and team collaborate to keep the product backlog **continuously updated** and **work prioritized according to value**
- The product owner and team collaborate to move work items to the **iteration backlog** during **iteration planning meetings**

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Wireframe

A diagram that represents a static blueprint or schematic of a user interface used to identify basic functionality; a form of prototype



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8D Plan Releases and Iterations

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Develop a Release Plan



A release plan sets expectations for the dates, features, and/or outcomes a project expects to deliver over the course of several iterations

Value Delivery Questions

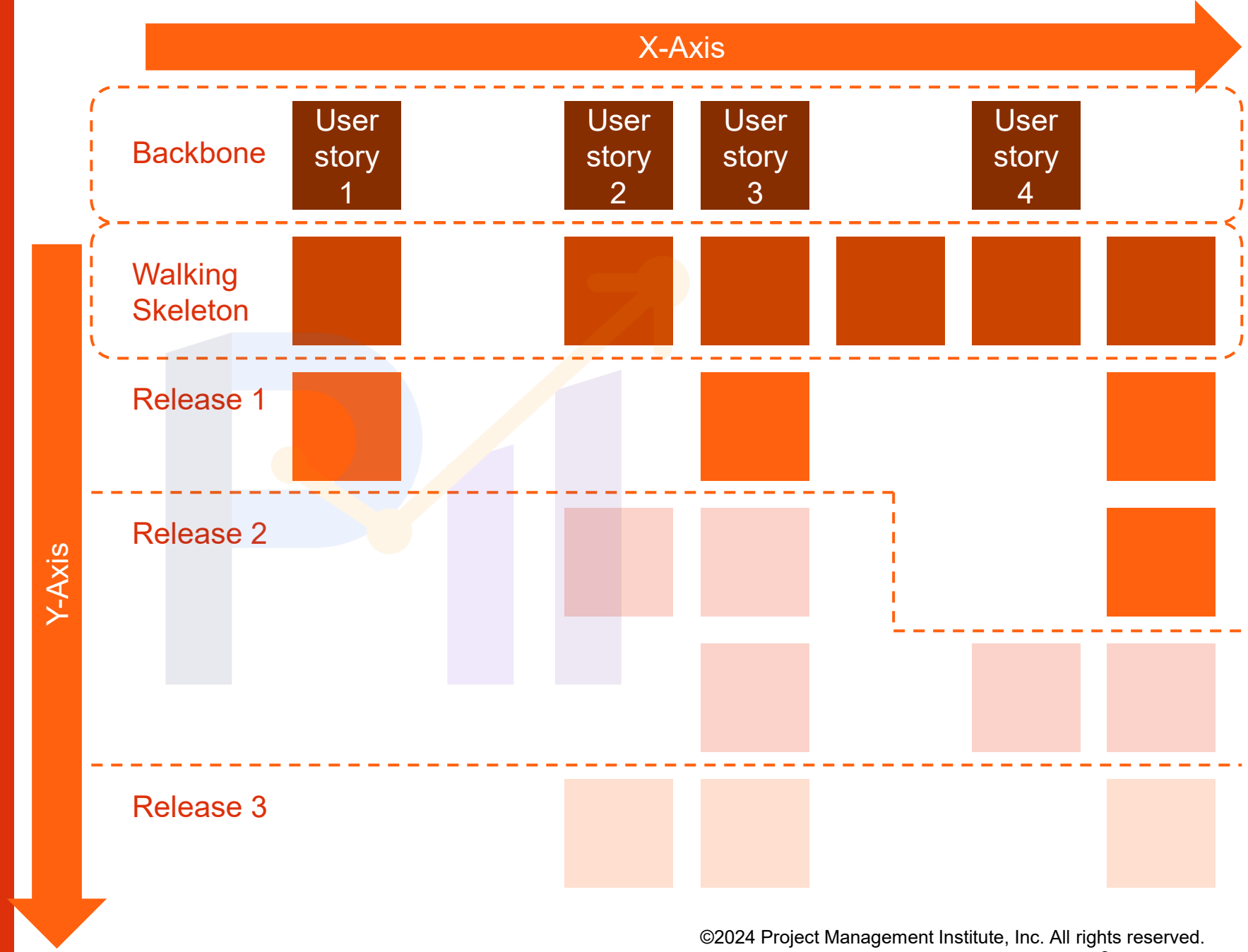
- What are the most valuable product features?
- In what order can we deliver those features and also deliver value?

An answer: Determine the minimum viable product (MVP)

A concept used to define the scope of the first release of a solution to customers by identifying the fewest number of features or requirements that would deliver value

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Group Stories by Releases



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Prioritization Techniques

- Development team helps product owner prioritize items in the product backlog
- Items in the iteration/sprint backlog are prioritized at an **iteration/sprint planning meeting**
- Techniques you should know:
  - MoSCoW
  - Dot voting or multivoting
  - Buy a feature
  - Kano model



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MoSCoW Prioritization Scheme

- **Must have**—critical to project success
- **Should have**—important, but not necessary for delivery in the current schedule timeframe
- **Could have**—desirable requirements but not necessary
- **Won't have**—least essential requirements; will not be released

	MUST have	SHOULD have	COULD have	WISH TO/ WON'T have
Fewest clicks possible to complete				
Disability access				
Data security/encryption				
Multilanguage translation				
"Congratulations" chime when purchase is complete				

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MoSCoW Prioritization Scheme

Steps:

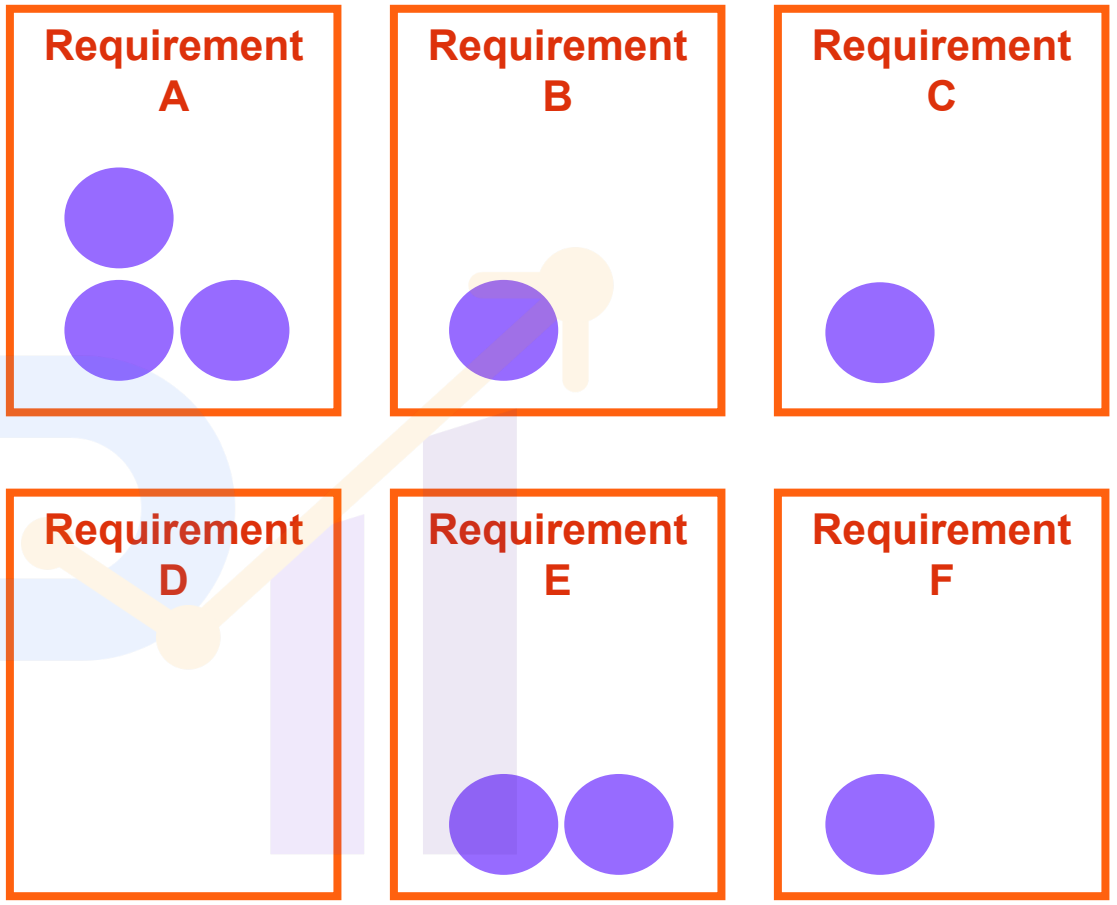
1. Elicit requirements
2. Arrange for stakeholders to meet
3. Review the entire unordered requirements list
4. Classify each into one of the four categories



	MUST have	SHOULD have	COULD have	WON'T have
Fewest clicks possible to complete		X		
Ability to pay with digital currency and PDCs	X			
Data security/encryption	X			
Real-time multilingual translation	X			
"Congratulations" chime when purchase is complete				X

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Dot Voting or MultiVoting Schemes



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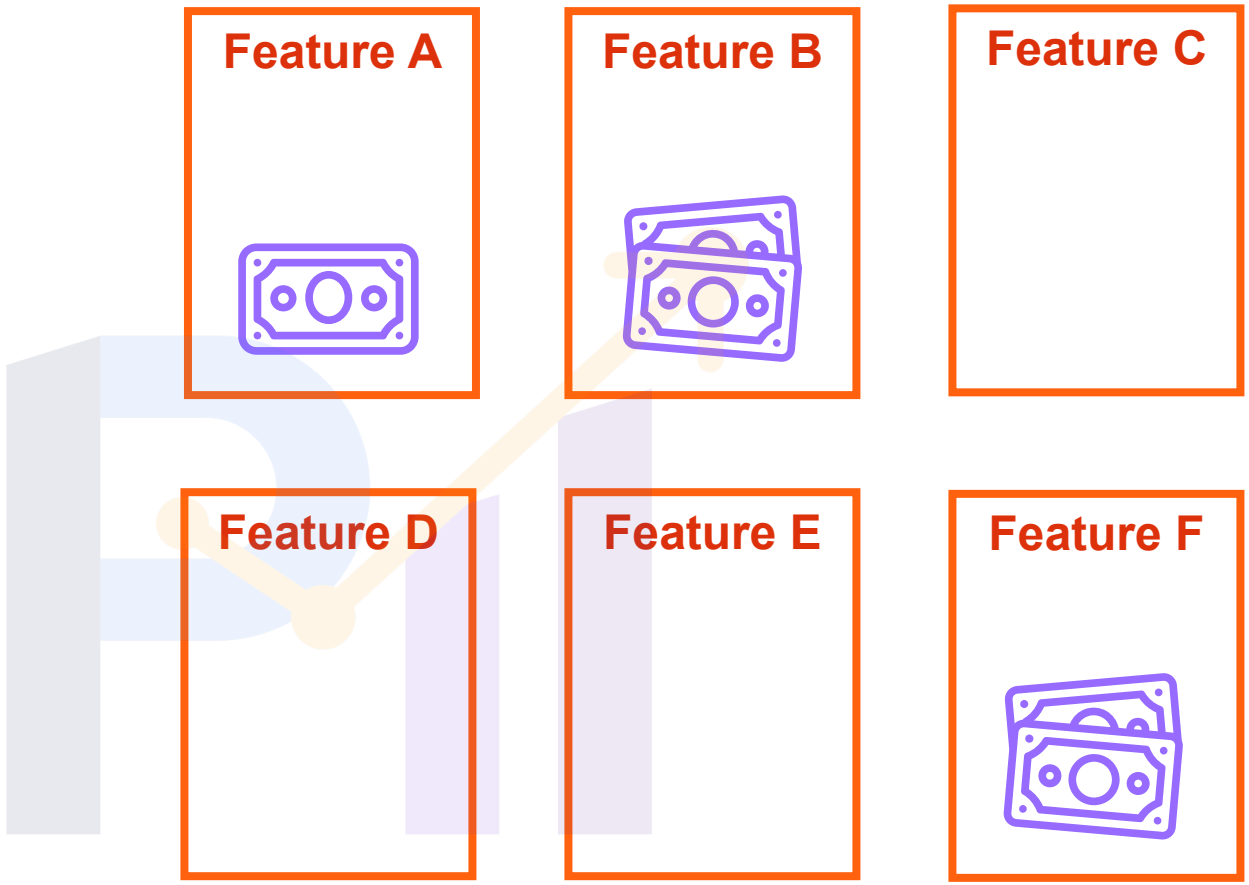
Example of Voting Using Numbers

Each person has 100 points to allocate across all rows

	Dietrich	Liesl
A	75	33
B	25	33
C		33
D		1
E		
F		
TOTAL	100	100

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Buy a Feature

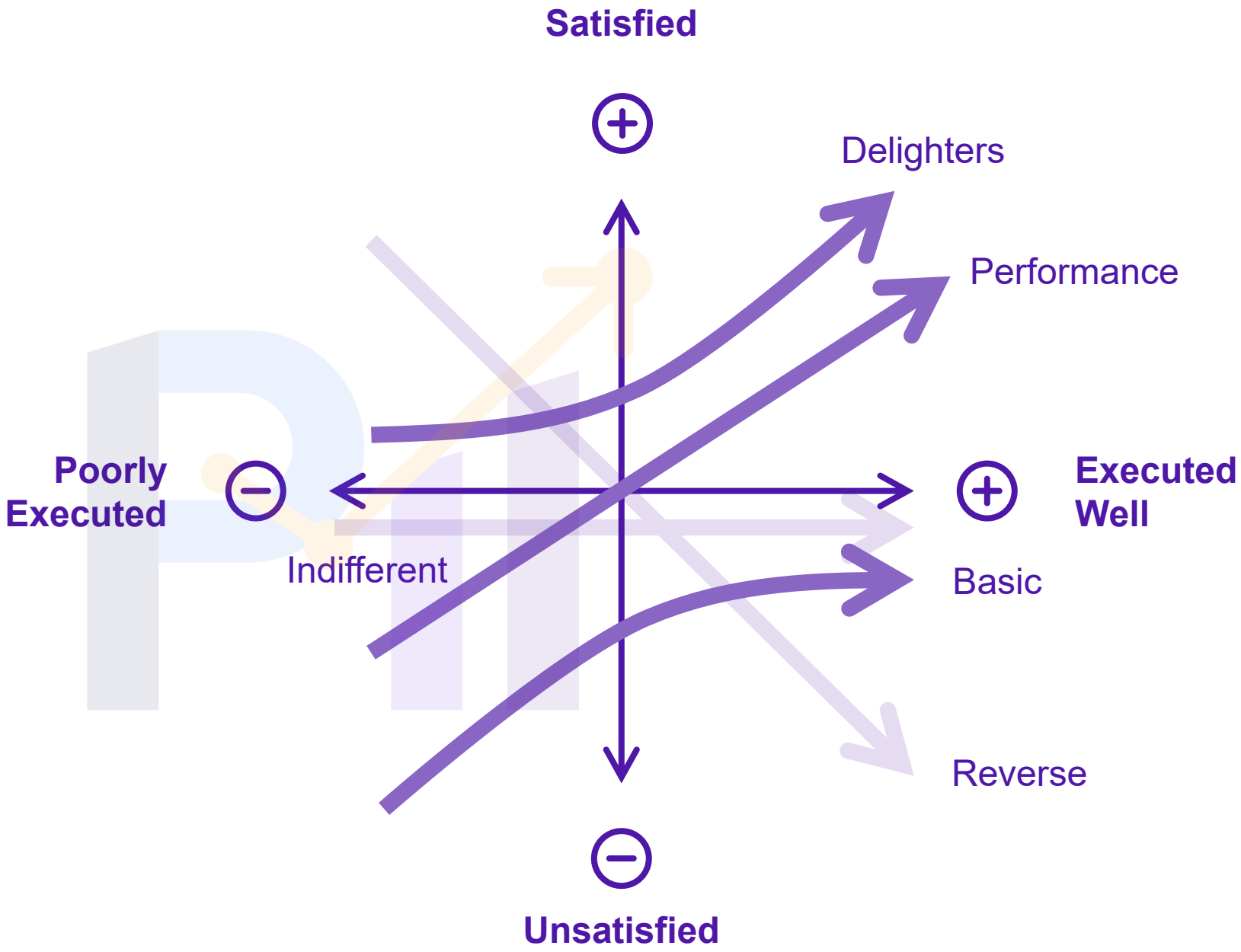


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Kano Model

In the website development project, the team wants to know whether they should develop the real-time AI translation feature or the new payment features first.

Explain how Kano analysis can help.



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Iteration/Sprint Planning

- Delivery team runs the meeting
- Product owner and stakeholders may attend
- It’s timeboxed—

[# of weeks in iteration] ✕ 2 = Duration



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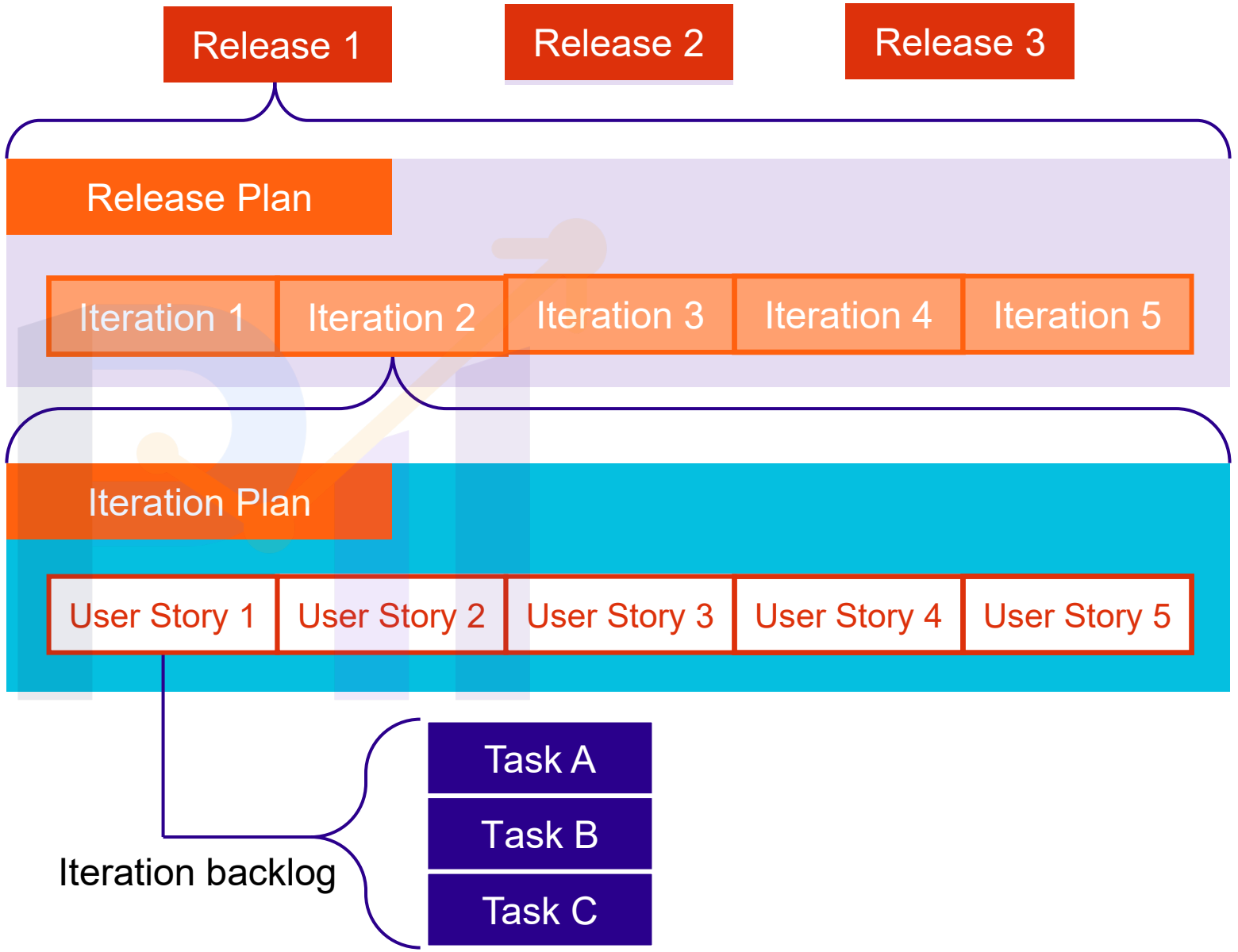
Iteration Planning

- Set meeting goals and **timebox**
- Discuss the high-**priority** user stories
- Select user stories based on team **velocity**, a metric indicating how much work the team can safely predict will be completed
- Understand the **acceptance criteria** for each user story
- Break down user stories into **tasks**
- Team members self-assign tasks
- Compile an **iteration backlog**



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Overview of Different Levels of Plans



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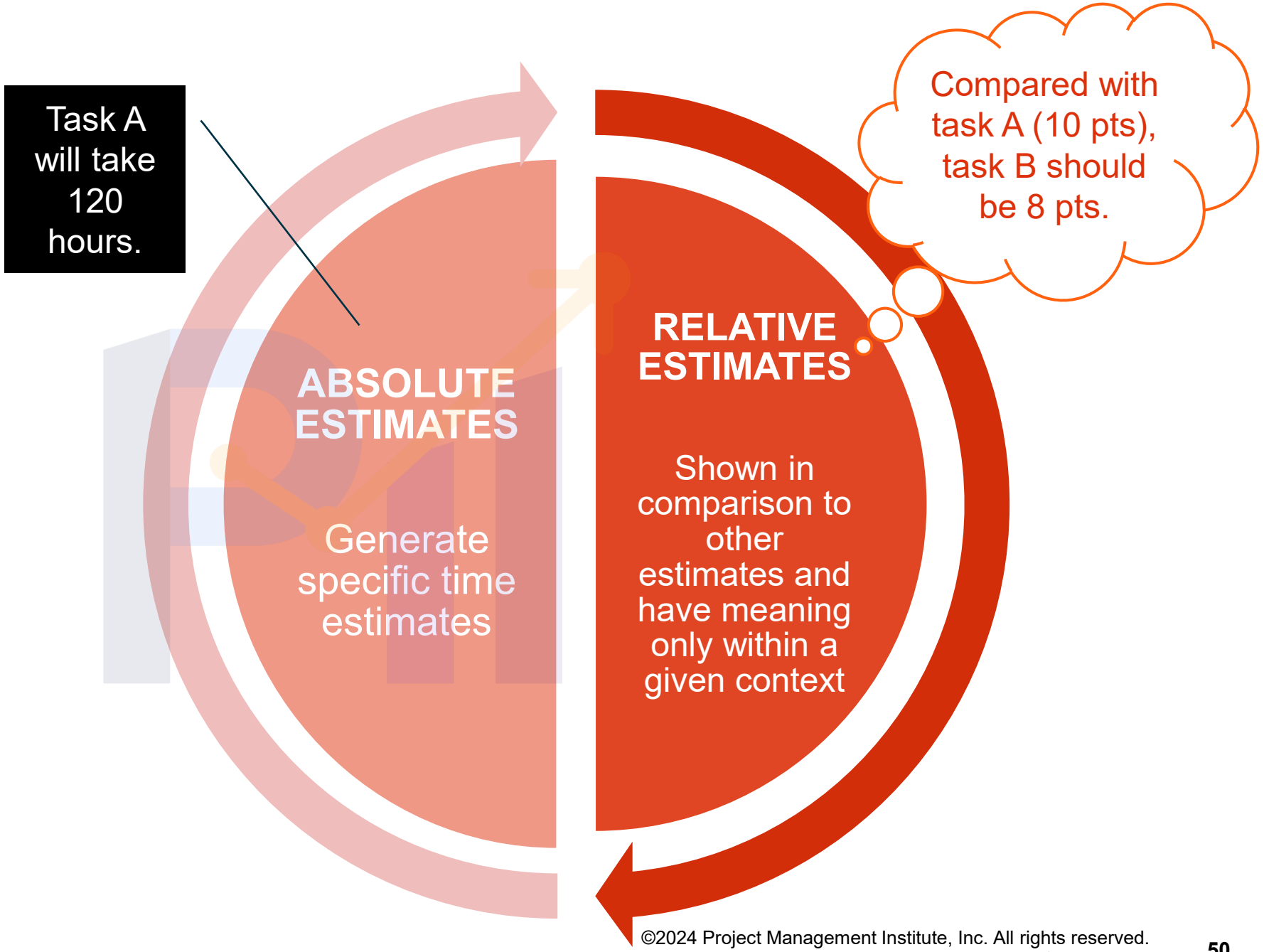
Team Roles and Responsibilities for Estimation Tasks

Backlog	Responsibility	Task
Product backlog	Product owner	• Assesses product scope; • Defines which features to be released
Release backlog	Product owner, solution architect, business analyst	• Identify which features to assign to a specific release • Select user stories for each release
Iteration backlog	Product owner and team	• Select a subset of stories to complete during one iteration
Tasks within a user story	Individual team member	• Selects tasks for implementation

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Estimate Effort with Story Points

***Story point**—a unitless measure used in relative user story estimation techniques*



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Estimate Effort with Story Points

Do you think these tasks are the right size? Can any of them be completed in two weeks?



Enable real-time multilingual translation using AI for the customer service chat

	Complexity (1–5)	Uncertainty (1–5)	Effort
Generate a complete list of languages for the website			
Identify AI consultants and obtain estimates			
Design the customer service chat app			
Build and test the app			

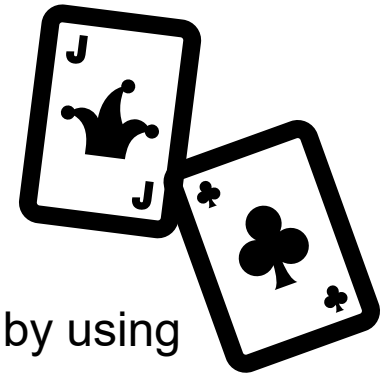
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More Effort Estimation Techniques



T-Shirt Sizing

Use **t-shirt sizes** to assign values



Planning Poker

Estimates effort or relative size of development effort by using deck of cards with modified numbers or **Fibonacci numbers** to vote on user stories.

A mathematical sequence in which the value of each number is derived from the sum of the two preceding numbers (0, 1, 1, 2, 3, 5, 8, 13, 21, 34, 55, 89, 144 ...)

Use the cards and a simplified Fibonacci sequence:

- Each team member gets a set of cards
- The product owner (who is NOT allowed to estimate) presents the item to be estimated
- The item is discussed
- Each team member privately selects a card to represent their estimate

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8E Adaptive Approaches or Frameworks

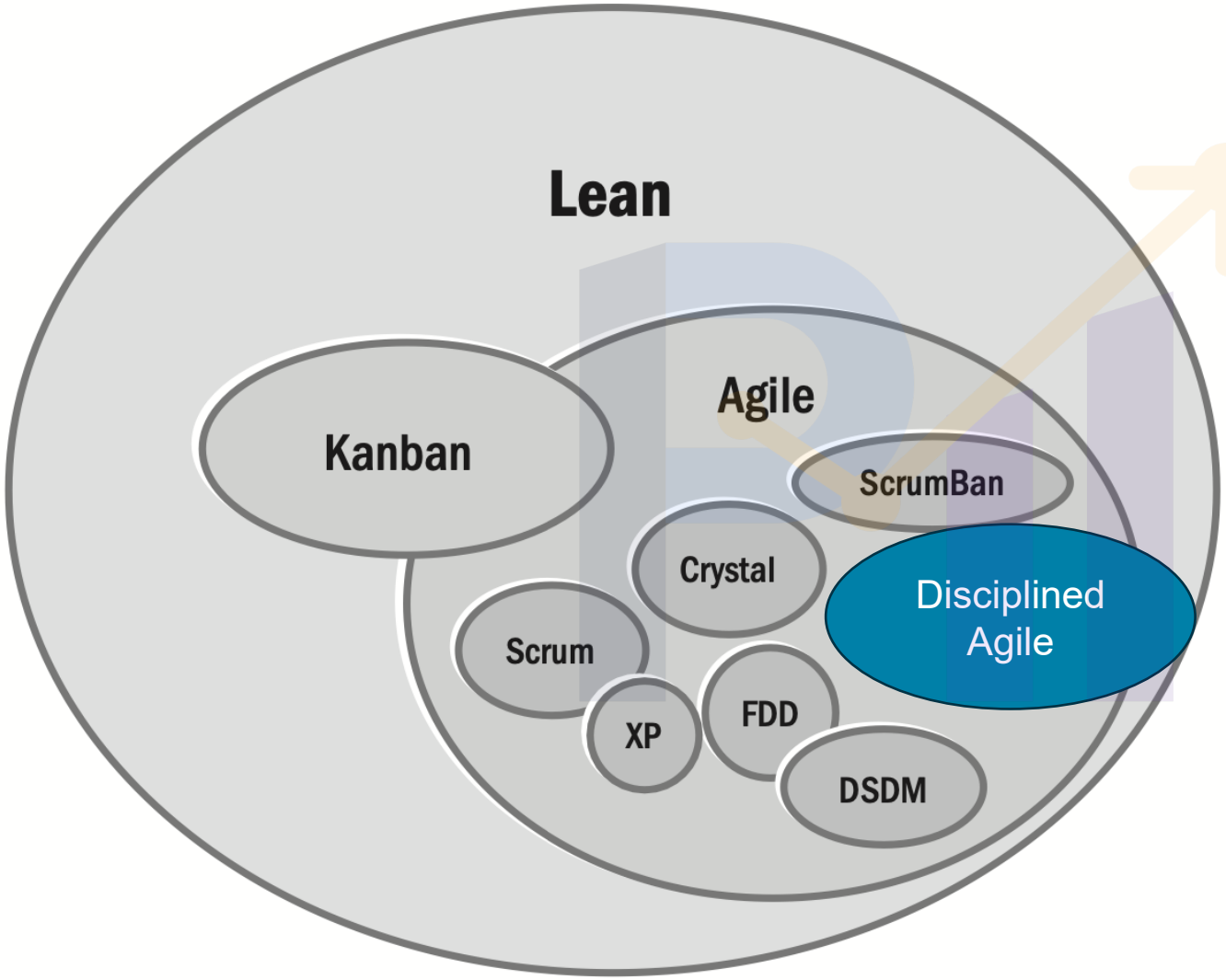
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Adaptive Team Culture and Practices Are People-Centered



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Most Popular Adaptive Frameworks



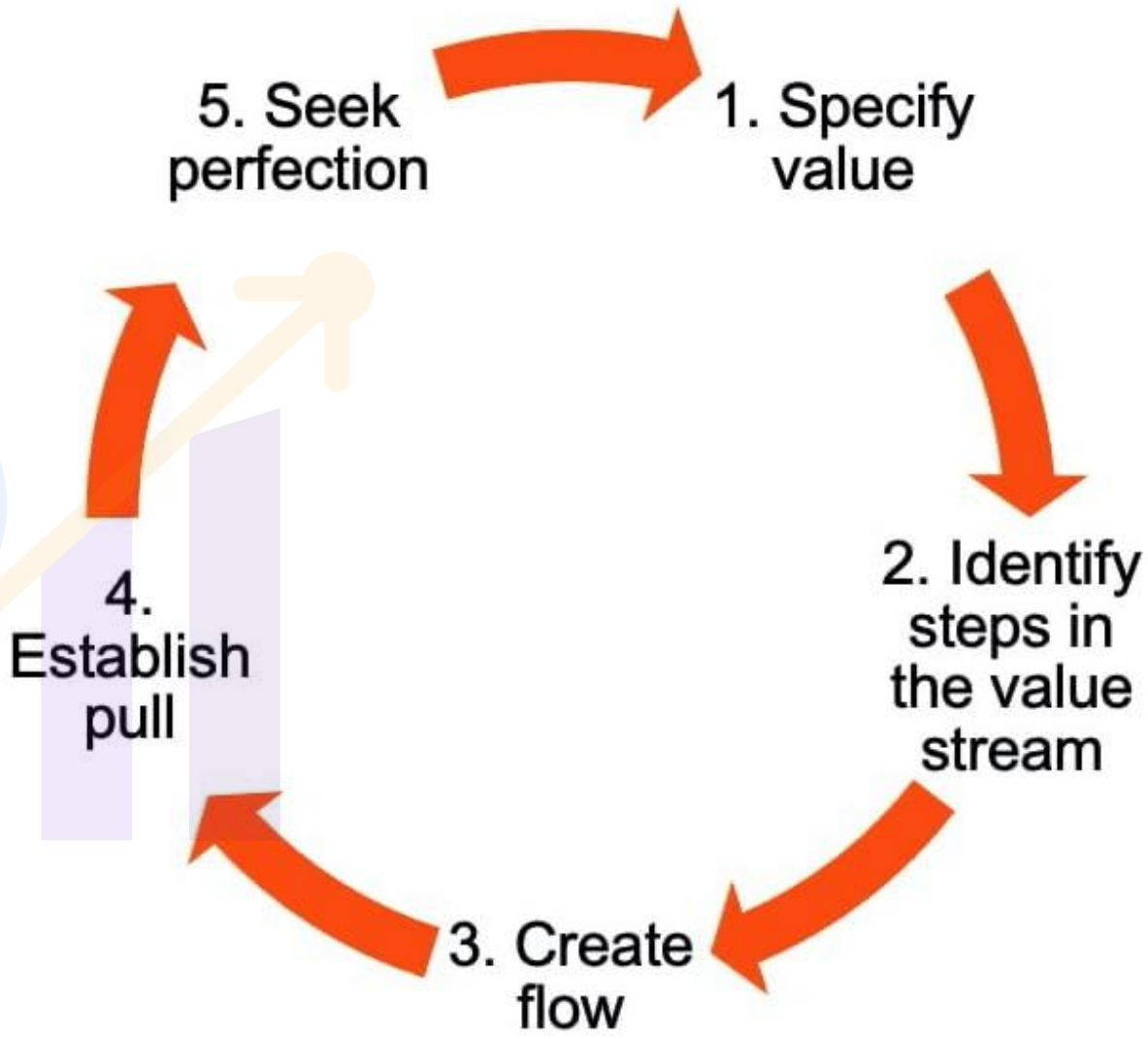
Lean thinking emerged as an enterprise-improvement method

- Pioneered by Taiichi Ohno of Toyota in Japan ca.1950s
- Kanban and agile emerged from lean thinking

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Lean Thinking

- Founded on **respect for people** and **continuous improvement**
- A set of management practices for quick value production
- **Workflow optimization—Reduce delays** and **eliminate waste** to increase quality and lower cost



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Scrum: Core Values

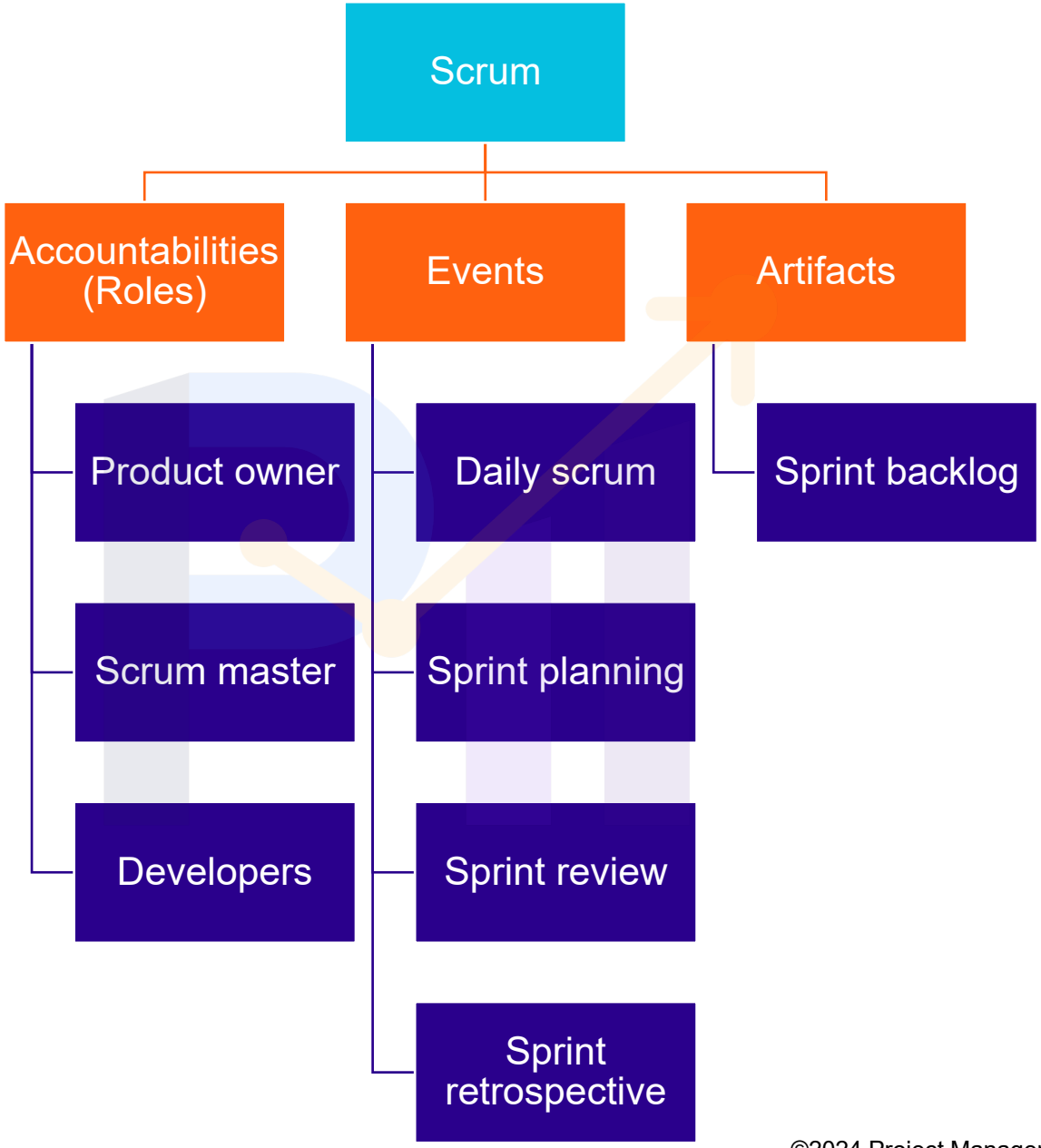
- Courage
- Respect
- Openness
- Focus
- Commitment

Scrum Alliance
https://www.scrumalliance.org



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Scrum Components



Scrum Alliance
https://www.scrumalliance.org

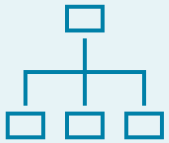
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Scrum Flow



Product Backlog

- Prioritized list of features and requirements to be developed
- Maintained by product owner
- Constantly updated with stakeholder feedback



Backlog Refinement
Throughout the sprint, the team and product owner refine the **product backlog—**add new items, remove items that are no longer relevant, and reprioritizing all items



Sprint Planning

Before each sprint, team selects product backlog items and creates a **sprint backlog**



Daily Scrum

10–15 minute daily meeting when team members discuss progress, issues, and plan the day's work



Sprint Review

- After each sprint, team meets to demonstrate completed work
- Product owner and stakeholders provide feedback on the work



Sprint Retrospective

After the sprint review, the team holds a sprint retrospective meeting to reflect and identify areas for improvement:

- What went well
- What didn't go well
- What can be done to improve the process

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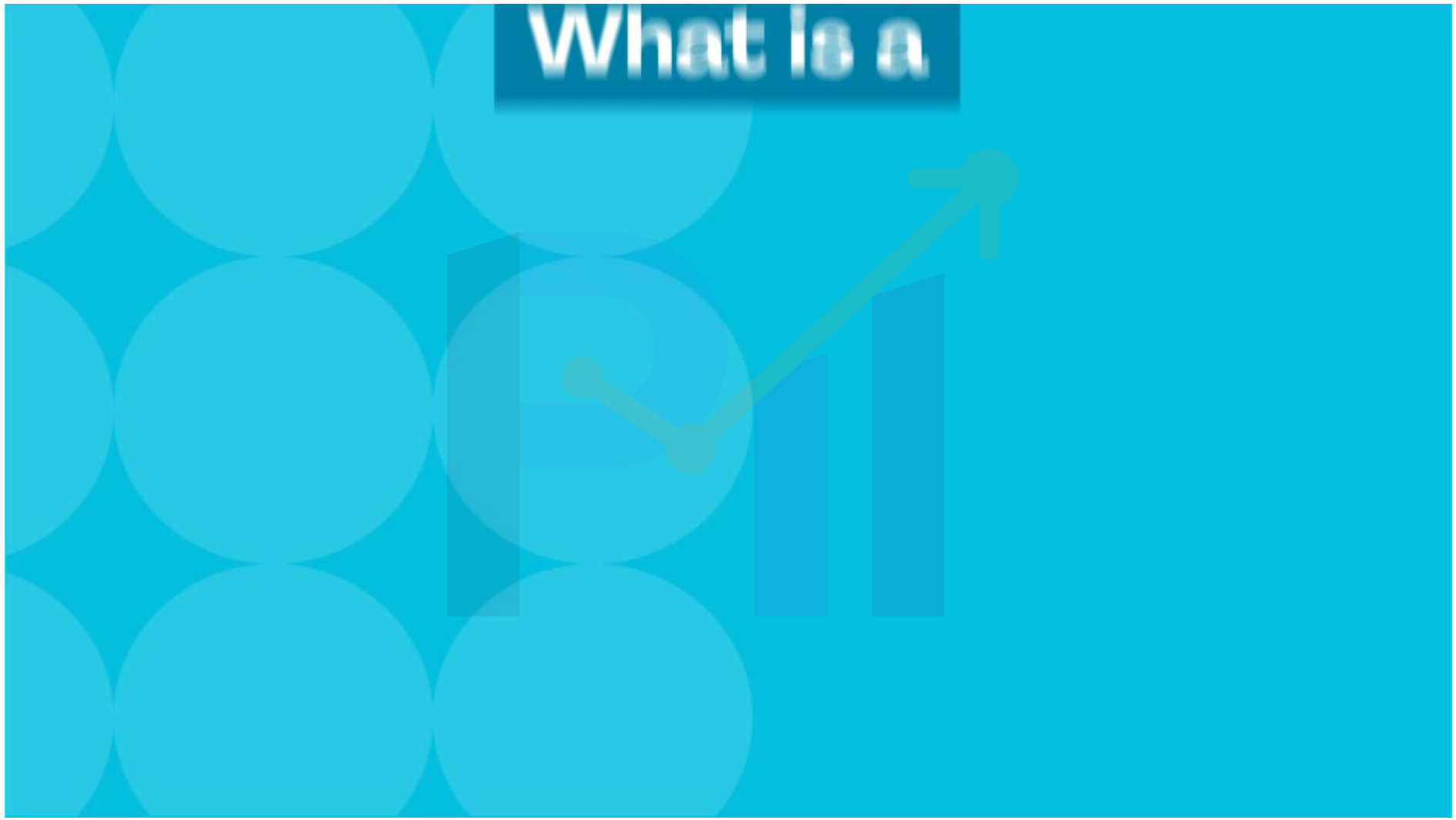
Kanban Method (看板)

An agile method inspired by the original kanban inventory control system and used specifically for knowledge work

- Start-where-you-are, nonprescriptive approach, meaning teams can apply this method within other approaches
- Continuous flow and delivery cadence (no timeboxes)
- Use of a task board (kanban board) to optimize workflow
  - Waste reduction focus
  - Limit on amount of work in process (WIP)
  - Bottleneck reduction
  - Improved efficiency and quality

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What Is a Kanban Board?



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Comparing Kanban and Scrum

Factor	Kanban	Scrum
Team management	Within existing hierarchical structures	Self-management
Process improvement	Process changes can be made anytime, and immediate modifications are actively encouraged	Process improvements are generally made after the sprint retrospective
Productivity measurement	Uses cycle time, lead time, and work in progress to assess productivity	Uses velocity and burndown rates to assess productivity
Life cycle	Flow-based agile	Iteration-based agile
Time focus	The primary focus is on cycle time and lead time rather than on meeting due dates; it is flow-oriented on continuous deliveries.	Sprints are typically 1 to 4 weeks in length, and a product increment or a version of the product is delivered at the end of each sprint.
Commonalities	• Both encourage process improvement • Both break projects into smaller processes that are iterated • Both encourage team collaboration	

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ScrumBan = Scrum + Kanban

- Deliver often and quickly
- Optimize the workflow
- Develop user stories and manage them using kanban boards to control for work in process (WIP) limits



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Agile Software Development Methods—1 of 2

Feature-Driven Development (FDD)

Supports feature implementation in large and lengthy software projects

- Delivers client-valued functionality or "features first"
- Like Scrum but uses shorter iterations
- Uses features instead of user stories to capture requirements
- Customer is the end user

eXtreme Programming (XP)

- An iterative-incremental framework
- Uses pair programming
- Shares many features with Scrum:
  - Timeboxed framework—1 week iteration
  - Customer collaboration
  - Colocated teams
  - User stories
  - Daily standups / scrums / coordination meetings

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Agile Software Development Methods—2 of 2

Crystal Methods

Family of methodologies using color codes

- Emphasis on people/human talent and interaction
- Designed to scale and provide a selection of methodology rigor based on project team size and criticality
- Characteristics: Frequent delivery, reflective improvement, close (osmotic) communication, access to SMEs, highly technical environment

Dynamic Systems Development Method (DSDM)

- Agile (iterative) project delivery framework
- Prescriptive framework for systems development
- Constraint-driven delivery sets fixed cost, time, and quality at the start
- Scalable model supports IT projects of all sizes in any business sector

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Disciplined Agile

A tool kit that harnesses hundreds of agile practices to guide you and your organization to the best way of working (WoW)

www.PMI.org/disciplined-agile



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Knowledge Checks

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Question 1

Which prioritization technique gives stakeholders a fixed numbers of indicators to rank feature priority?

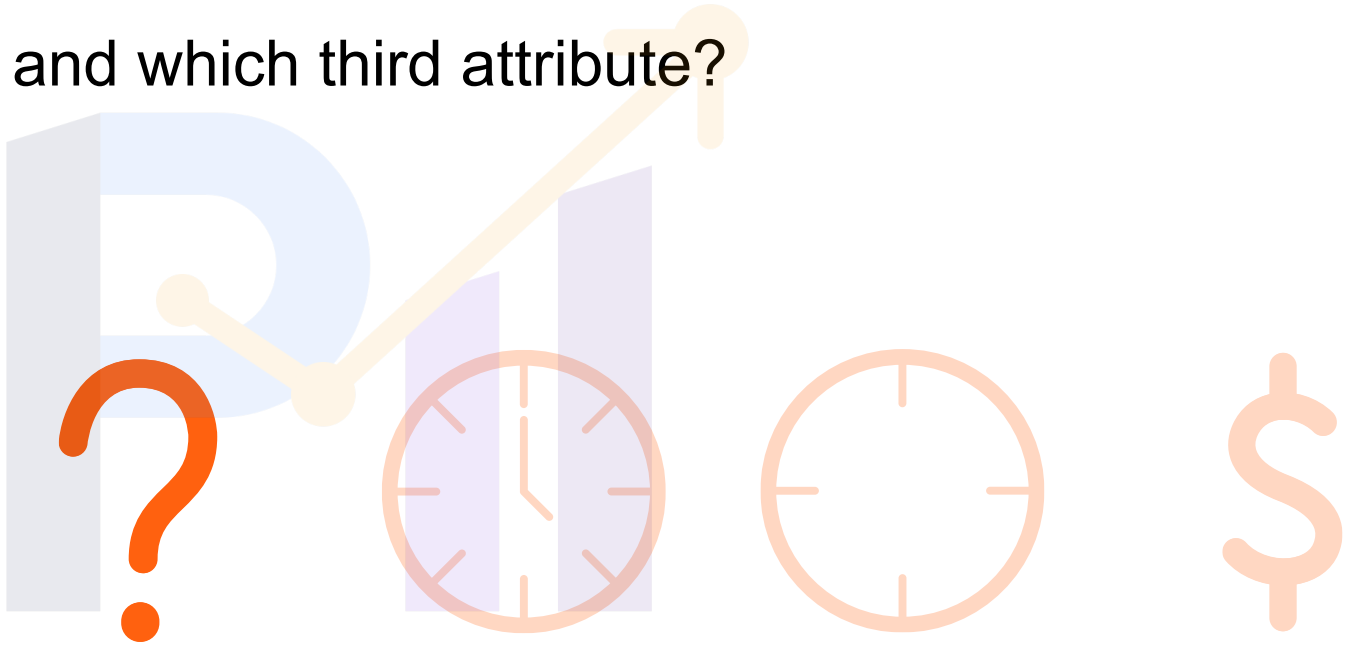


1. Kano
2. MoSCoW prioritization scheme
3. Dot voting
4. **Buy a feature**

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Question 2

Adaptive project estimation requires that a user story be evaluated according to complexity, size, and which third attribute?



1. Uncertainty

2. Time

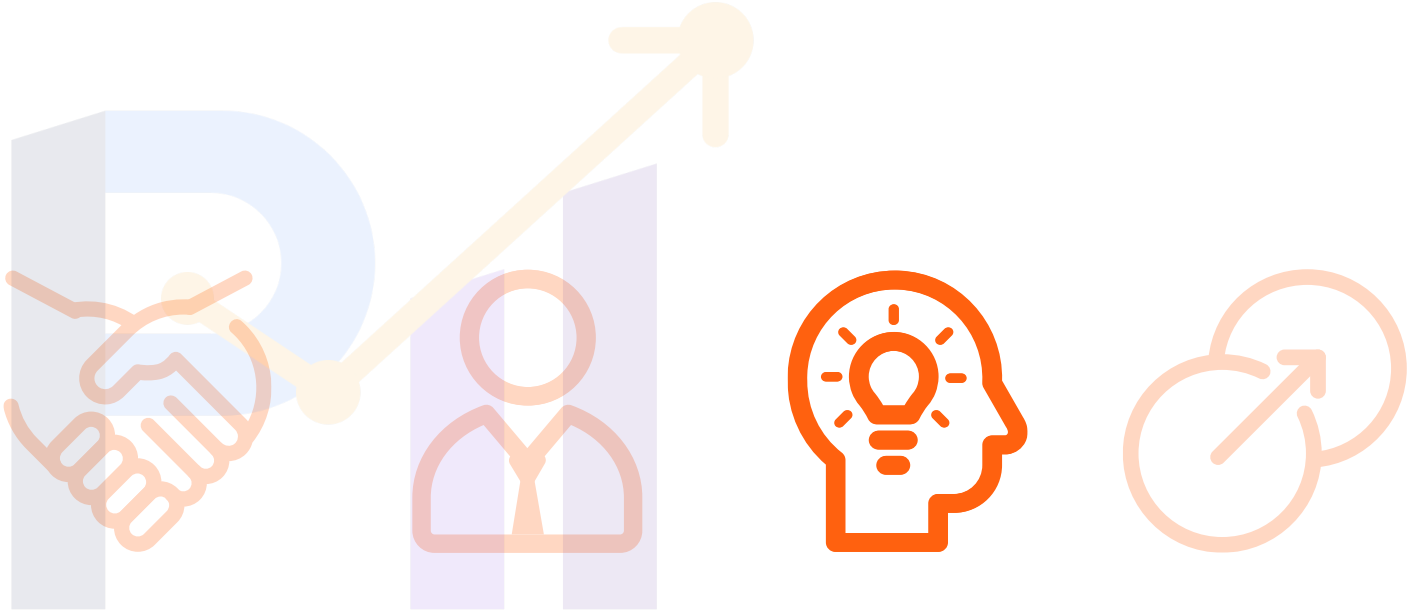
3. Scope

4. Cost

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Question 3

What type of requirements are often expressed in the form of user stories?



1. Business requirements
2. Stakeholder requirements
3. **Solution requirements**
4. Transition requirements

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Question 4

What is the agile mindset?

1. A set of approaches for developing software

2. A preferred leadership style in project management

3. A leadership style focused on resilience

4. A flexible way of thinking, being, and working

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Knowledge Check 5: The Product Owner Role

The product owner's role is to coach, train, and motivate the development team to meet the goals during each sprint. Is this statement true or false?

True

Sorry, but it's false! The product owner is the key decision maker, representing the customer as well as the business. It's the scrum master who leads and motivates the team to reach the goals of each sprint.

False

False is correct! It's the scrum master's responsibility to coach, train, and motivate the development team. The product owner is the key decision maker, who represents the customer and the business.



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Wrapping Up

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Summary

8A	Foundation and Considerations for Adaptive Projects
8B	Typical Steps in an Adaptive Project
8C	Requirements in Adaptive Approaches
8D	Plan Releases and Iterations
8E	Adaptive Approaches or Frameworks



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Next:

Project Work and Delivery

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