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Agile Assessments

v2 January 2013

This document provides overview information for our approaches to agile team assessments. It's intended to give you a flavor for our general approach and the specific activities. However, each assessment is based on your specific organizational context; so it is customized, situational and unique.

Time-Frames

The assessment can take anywhere from 1-2 days to a full week or more depending on the size of the organization being assessed. While remote conversations are certainly possible, we much prefer face-to-face communication whenever feasible..

We work hard with you to optimize your time investment while still conducting a high-value assessment. We will not short-shrift the process to the point of diluting our efforts and your results.

Be aware that it often takes time as we construct the assessment—reviewing our notes, observations and interactions. We're trying to get to "the heart" of the assessment and not inundate you with a myriad of observations and recommendations. Typical turnaround times can be as much as two weeks after closing the assessment.

Focus

We focus on 3 primary areas when doing an assessment:

1. Team Agile Practices & Maturity
2. Leadership Agile Transformation Support & Maturity
3. Overall Organizational Agile Adoption Maturity

Typically, you'll receive a Top 10 list of high-impact, meaningful observations & recommendations, aligned within these three broad categories, for your action planning.

Mindset

It is particularly unhelpful if this is viewed as an agile grading system or as a team by team comparison.

The entire driver behind the assessment should be (1) awareness of critical areas for improvement and (2) establishing team-based improvement strategies to help guide you towards your next level of agile performance.

Two Types of Assessments

RGCG typically provides two types of agile assessment for its clients—

Agile Readiness Assessment

Here we review an organization (teams) that are intending to “go Agile” within 0-3 months. We’ll assess key success factors in the organizational landscape and report out on characteristics that will support / amplify agile adoption and those that will impede / drag your agile adoption.

Here are two blog posts that highlight some of our thoughts on Agile Readiness:

1. [The Price of Admission to Agile Practices](#)
2. [Importance of Initial Training & Agile Certifications](#)

Agile Maturity / Progress Assessment

Here we assess your maturity from a “doing Agile” versus a “being Agile” perspective. Analysis categories are dynamic based on the methodologies, agile maturity, culture and organizational dynamics.

At times, we’ll also use the [Agile Journey Index](#) by Bill Krebs ¹ as a guide to assessing and articulating your maturity/progress levels. We’ve found it to be useful as an assessment instrument because of its lightweight nature. We even extended the index to evaluate the Product Owner role and Product Organization. We’ve documented that in our upcoming 2nd Edition of Scrum Product Ownership and have found it useful in assessing product-level maturity.

Note: and while the index provides numerical assessments, it is not a grading or comparison system.

Notion of Base-lining and Ongoing Assessments

Some of our clients find it particularly useful to schedule and conduct assessments on a regular interval; usually on a quarterly or semi-annual basis. This provides an independent assessment on how they’re evolving and maturing.

The initial assessment serves as a base-line for later assessments and the real value here is establishing improvement trending over time. Since many agile teams occasionally regress, this historical perspective can be quite useful in guiding and planning adjustments.

¹ We’ve established a partnership with Bill Krebs and Agile Dimensions, LLC in leveraging the Agile Journey Index. We’ve found that if properly utilized, it does provide a framework for maturity assessment and for discussing and tracking on-going continuous improvement efforts.

Agile Assessment Framework

RGCG applies and recommends a 4-part assessment framework as follows:

1. Interview

- a. Senior leadership, functional managers, PO's, SM's, sampling of team members
- b. 1 hour each; could do some of this in groups ("management" and "team")
- c. This is minimally a day; depends on the organizational & sample size

2. Observe

- a. Daily stand-up(s), backlog grooming, user story / backlog quality, sprint planning, information radiators, sprint review, retrospective?
- b. This is all dependent on their sprint tempo. We'd need to time it for a sprint boundary transition.
- c. Due to tempo dynamics, this is minimally 2 days; depending on the # of teams.

3. Write-up

- a. Digest data, follow-up email, looking for patterns & trends
- b. Typically the report format will focus on 3-levels in the organization by (Organization, Management/Leadership, Team) and focus on:
 - i. General Observations
 - ii. Strengths
 - iii. Improvement areas
 - iv. Prioritized backlog for improvement recommendations; for each area
- c. This usually takes a few hours (2-8) to construct, but takes a week to pull together. We find that some "thinking" time is required.

4. Deliver

- a. We much prefer delivering the assessment report to the entire team; management + team members. Sometimes management wants a pre-screening of the recommendations.
- b. Clarification Q&A
- c. Follow-up is the responsibility of the teams...