

OpenAgile™ Learning System™

Project Success Assessment – Assessor's Guide

Purpose - 3 levels of understanding success:

This assessment tool helps your organization to understand, on one level, the priorities around project constraints. Once this level of understanding is clear, the next step is to develop an understanding of the project-level challenges and supports for using OpenAgile. Next, you will use it to determine how to customize the use of OpenAgile to best fit the priorities.

5(+) constraints:

This tool starts with **five project constraints**, but allows additional constraints to be specified by those participating in the assessment. The five initial constraints are: **Quality, Scope, Schedule, Cost, and Morale**. Most organizations have explicit guidelines around Scope, Schedule and Cost, but may not have clearly understood standards for Quality and Morale. As well, most organizations place highest priority on Schedule, Scope, Cost, Quality and Morale - in that order.

Running the workshop:

The OpenAgile Project Success Assessment tool is designed to be used in a group workshop context. The Assessor will work with an appropriate group of people in an interactive fashion to collaboratively arrive at an understanding of the priorities of these five constraints as well as any other constraints the group sees fit to add to the list. The workshop should generally take between one and two hours depending on the number of people in the group. The steps of running this workshop are as follows:

1. Prepare the meeting space (see diagram below):
 - A blank space of wall, whiteboard or a flip-chart.
 - Ten yellow 3x5 PostIt's arranged vertically at the left of the blank space with Quality, Scope, Schedule, Cost and Morale written clearly on the top five.
 - Ten orange 3x3 PostIt's arranged such that there is one to the immediate right of every yellow PostIt.
 - Two blue 3x3 PostIt's arranged at the top of the blank space so that immediately above the top orange PostIt is a blue PostIt with the number zero written on it, and to the right of that at least 50cm and at most 150cm is the second blue PostIt with the number ten written on it.
2. Introduce the purpose of the workshop: to understand the constraints on projects (or a specific project) and how those constraints will affect our use of OpenAgile.
3. Explain that the group will position the orange PostIt's horizontally to reflect the priorities of the constraints on the yellow PostIt's. An orange PostIt under the “zero” blue PostIt means that that constraint has no priority, and under the “ten” means that it is completely non-negotiable for fear of the organization failing.
4. As a facilitator, the Assessor will then guide a discussion for each of the five constraints. It is acceptable for individuals in the group to come up to the displayed PostIt's and move them around themselves. The facilitator does not express any judgement on the positioning of the PostIt's.
5. Once the PostIt's are positioned for the five constraints, the facilitator can ask if there are suggestions for other constraints. There should never be more than ten in total. The discussion continues until all the orange PostIt's are positioned for all the constraints.
6. The final step is for the group to agree on numerical numbers to represent the positions of the orange PostIt's. The Assessor can make judgement calls to help this move quickly.

The Assessor then fills in the values on the spreadsheet as an electronic record and records the names of the participants on the Tracking sheet. It is also recommended that a digital photo be taken of the resulting positioned PostIt's for distribution to participants. Once recorded, this information is shared with stakeholders to elicit feedback.

Generally speaking, OpenAgile encourages a prioritization of these constraints for Quality and Morale with Cost and Schedule being lower priority and Scope being a “zero”. Scope is considered a dependent variable. However, OpenAgile work types (Work Queue, Repetition, Obstacles, Quality and Calendar) are designed to allow for flexible prioritization of the constraints. The Assessor examines the priorities derived from the assessment and then determines the likely weighting of the five work types. This, in turn, will allow a selection of initial OpenAgile rules to be made. This selection process is not deterministic; the judgement of an experienced Assessor is required.

The OpenAgile Project Success Assessment should be run at the start of every project (agile or otherwise) and as a general examination of corporate priorities when required.

Diagram: Project Success Assessment – Initial Arrangement:

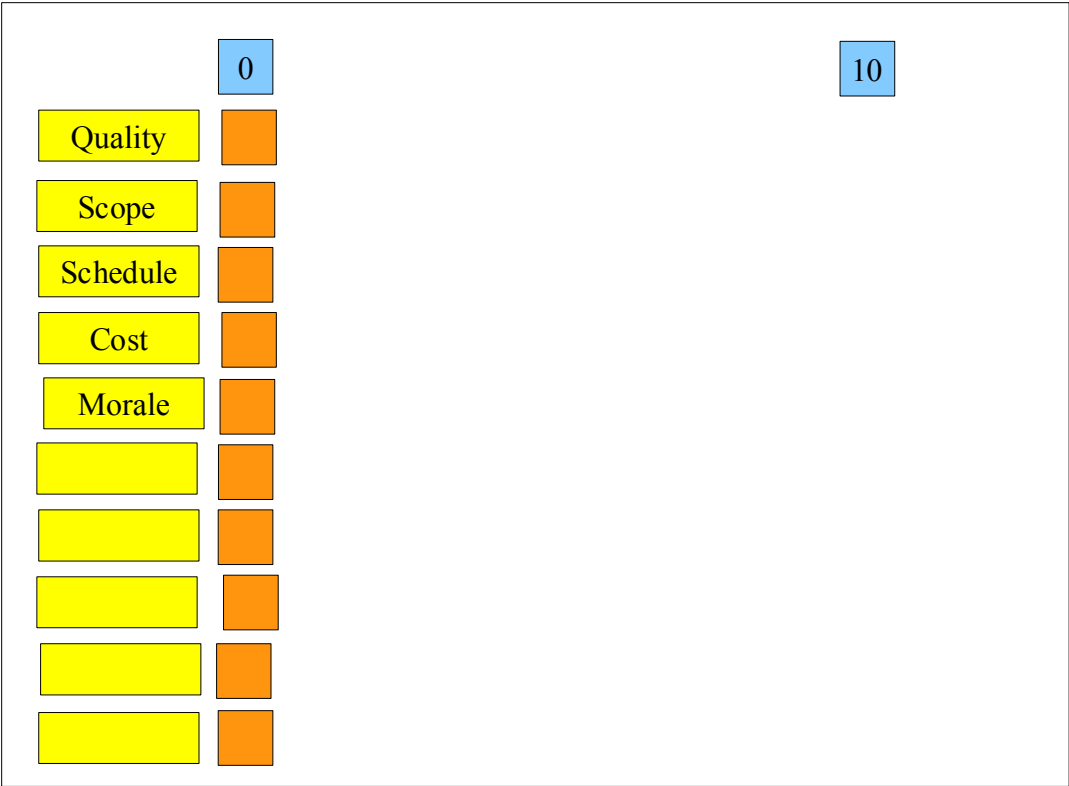


Diagram: Project Success Assessment – Sample Final Arrangement:

