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PRINCE2Agile1 2-Ebook

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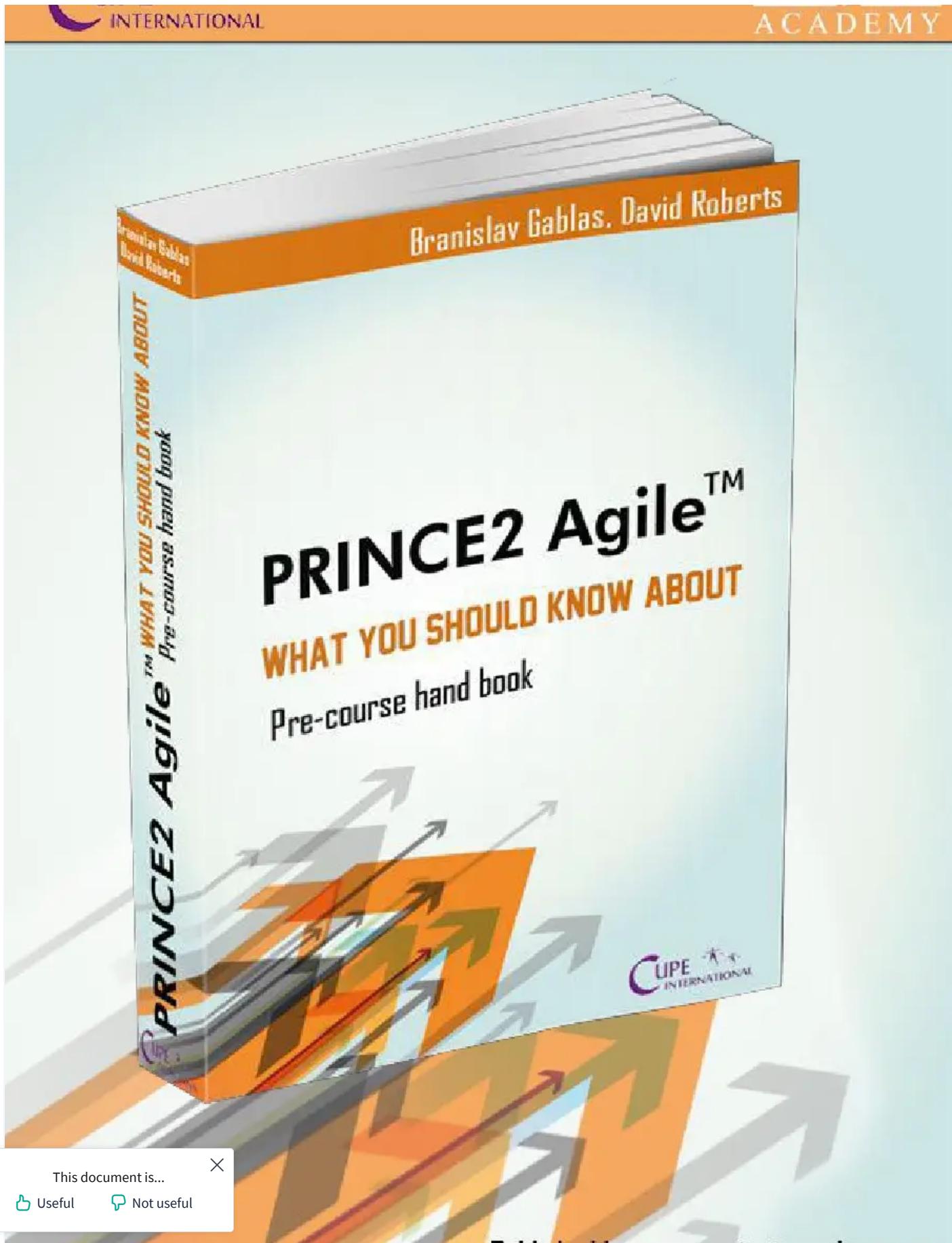
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Foreword

Present rapidly developing industries demand project management that enables quick responses to changes. Some users of the PRINCE2® project management method started to search for a way to incorporate agility in their projects.

This book is designed, to help you understand how you can incorporate Agile ® into your PRINCE2® projects. It provides an overview of PRINCE2 Agile®. You will probably understand it faster if you are a PRINCE2® certified project manager or if you know the basics of Scrum, AgilePM® Kanban or any other Agile framework, but if you do not know any of these methods, it provides a recap of PRINCE2® and explains how the standard PRINCE2® method could be combined in with Agile.

Some illustrations from real projects or case studies are given to aid understanding. So, what you can learn in the book?

1. Basics of the PRINCE2® method
2. How agility can be added to PRINCE2® project
3. Project objectives in an Agile environment
4. Agilometer any Cynefin
5. Scrum and Kanban
6. Business case and value in the project
7. How an organization can be tailored
8. Agile approach to the plans
9. Which process is influenced the most
10. Requirements for training and examination

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1. Basics of the PRINCE2® method

If you are a certified and experienced PRINCE2® project manager, you do not need to read this chapter. This chapter will review Version 5 of PRINCE2® from 2009 without mentioning Agile methods which appear in later chapters.

1.1 What is in and what is out

PRINCE2® is a very flexible and effective method of project management. It can only be used in project environments, despite of some Agile methods, which can also be used in standard organization operations (sometimes called as BAU – Business As Usual). PRINCE2® is universal, can be used in any industry (while many Agile frameworks are dedicated to be used only in IT projects), any type of project and any country. PRINCE2® does not contain any “soft skills”; although it recognizes, that as the project manager, you must know about leadership, motivating people, solving conflicts, building teams and have presentation skills. All of this is outside of PRINCE2® and you must gain these skills in addition to the PRINCE2 or Agile method.

PRINCE2® does not teach any techniques. In fact, there are two generic techniques explained in PRINCE2® (Product Based Planning technique and Quality Review technique), but if you have your own techniques, you are free to use them. (PMI defines 104 of them) and if you need to compare progress in the stage in comparison with sources spent and delivered value (defined in EVA), you must use some external knowledge.

1.2 Principles

PRINCE2® defines 7 principles. All of them must be applied in order to have a PRINCE2® project.

- a) **Continued business justification** – it might be obvious, but many projects still define justification at the beginning, but later this justification might disappear. It is important to check on regular basis, if the project is still viable, achievable and desirable and therefore worthwhile investing in it.
- b) **Learning from experience** – in fact, there is no project management standard or system, which would not support this principle. Experience from previous similar projects can help to significantly improve the success of the project and the project manager must seek this experience throughout the project’s life.
- c) **Defined roles and responsibilities** – this might seem natural but there might be people in a project who have no idea to whom they should report, what exactly they should do and when their obligation commences and finishes. They should

agree with their role in the project. Clearly setting up an organizational structure with defined roles and responsibilities of all people in the project will

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facilitate communication and bring better results in delivering the project objectives

- d) **Manage by stages** – the project cannot be managed as one big unit, but must be split into smaller chunks. It is not worth spending the time planning in extensive detail in advance, so it is better to split the project into shorter stages and plan in detail only to the horizon. To satisfy this principle, the project must have at least 2 stages; the first is initiation and the second is the management stage.
- e) **Manage by exception** – this is about tolerances given to the project managers. While they manage the project within tolerance, they have full discretion to continue. Once, there is a forecast of exceeding the tolerance limits, they must immediately escalate the situation to the next level of management
- f) **Focus on products** – though some project management methods concentrate their effort first on activities, central for PRINCE2® are the products. PRINCE2® delivers the benefits of the project via Project Product (final delivery of the project).
- g) **Tailoring to the project environment** – it is very natural that different projects will have different management styles. The Project Manager is committed to adjusting the project management method in order to increase the chances of the project being successful

1.3 Project objectives

PRINCE2® defines 6 project objectives (or targets), which are the same as project variables and tolerance areas. Tolerances in PRINCE2® are the permissible level of deviation above or below what has been planned. In some literature these 6 objectives might be also called aspects, but in Scrum or other methods, the word aspect has a completely different meaning

During management of stage The Project Manager works of stage mainly with time and cost tolerance, but all project targets must be controlled and managed since they might significantly influence the success of the project.

1.4 PRINCE2® Themes

PRINCE2® themes describe areas of project management that must be addressed continually.

1.4.1 Business Case

The Business Case theme closely relates to the Continued Business Justification principle and its purpose is to establish the mechanism to judge whether the project is

- ✗ desirable, viable and achievable, and is the major source for the decision
- ✗ assessment at the beginning as well as during the project.

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This theme addresses, how the initial idea or need is developed into a sound investment proposition for the organization and how the Project Manager maintains a focus on organization objectives through the project.

Business case should contain the following:

1. reasons to establish the project
2. business options (-do nothing, -do minimum, -do something)
3. benefits expected from the project in measurable form
4. dis-benefits, which might lower the value delivered by the project
5. cost (including the costs of the project, maintenance costs of delivered products and source for financing the project)
6. timescale including the period when benefits will be delivered
7. investment appraisal
8. major risks, which might have an impact on delivered benefits

1.4.2 Organization

Every project must have a clear organizational structure, defined roles and responsibilities of each person working on the project, lines of responsibilities and reporting. The purpose of the Organization theme is to define and establish the project's structure of accountability and responsibility.

A Typical PRINCE2® project has 4 layers of responsibility

1. Corporate or Programme, which is commissioning the project and after project termination, it will use the results of the project. This level sits above the project itself.
2. Directing level - Project Board, representing the interests of business, users and suppliers. It is responsible for the success of the project
3. Managing level - Project Manager, responsible for day-to-day management of the project
4. Delivering level - Team Manager, responsible for the development of the project.

PRINCE2® defines 8 basic roles:

1. **Executive** is ultimately accountable for the project success towards the corporate/programme management and key decision maker (supported by the senior user and senior supplier).

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User is responsible for specifying the needs of those who will use the product. He must specify the benefits which the Project's product

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(project deliverable) should deliver and is responsible that these benefits will be reached after the project when using the product output.

3. **Senior Supplier** represents the interests of those, who are developing the project's products. He is responsible for the quality of the delivered products and for the technical integrity of the project.
4. **Project Assurance** is a delegated role of the project board (Business Assurance, Supplier Assurance or User Assurance) and is responsible for monitoring all aspects of the project performance independently of Project Manager and also gives the advice to Project Manager prior escalation to the project board.
5. Project Board might delegate certain responsibility to the **Change Authority** if it is expected that the project is likely to face many changes. The Configuration management strategy will define the limits of responsibility of the Change Authority as well as the use of Change budget should it be necessary.
6. **Project Manager** is responsible for day-to-day management of the project. He has the authority to run the project on behalf of the Project Board within the constraints specified by the Project Board. He is responsible for the majority of the PRINCE2® processes and manages the project on a stage-by-stage basis.
7. The Project Manager might be supported by the **Project Support** (delegated role), which might be responsible for routine work, such as configuration management, maintenance of registers, assistance in reporting, planning, etc. The Role of the Project Support can be undertaken within a PMO.
8. **Team Manager's** primary responsibility is to ensure the production of products specified by the Project Manager in the form of work packages. The Team Manager reports to the Project Manager, but in small projects this role is not mandatory and can be undertaken by the Project Manager.

1.4.3 Quality

The purpose of the quality theme is to define and implement the means by which the project will verify that products are fit for the purpose.

PRINCE2® defines quality as the totality of features and inherent or assigned characteristics of a product, person, service and/or system that bear on its ability to show that it meets expectations or satisfies stated needs, requirements or specifications.

The quality theme also covers the implementation of continuous improvement during the project.

Only products of the agreed quality can guarantee the delivery of benefits so it is

check the quality continually during the process of development of the

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product as well as when products are delivered. PRINCE2® defines a quality review technique which should be applied to review the quality of developed products.

1.4.4 Plans

The purpose of the Plans theme is to facilitate communication and control by defining the means of delivering the products.

PRINCE2® defines 3 levels of plans:

1. Project Plan – a high level document which covers the whole duration of the project. The Project plan is prepared during the Initiation process and updated in Managing Stage boundary process. The Project plan is used by the Project board to control overall progress.
2. A Stage Plan is a low level plan with sufficient detail to manage the project on day-to-day basis. The Stage plan identifies when and how the project manager authorizes and checks the work-packages, to report the development to the Project Board and to monitor any deviations. The Stage plan is developed in the Managing a Stage boundary process and updated regularly during the stage.
3. A Team Plan is prepared by the Team Manager as best of the acceptance of Work package. It is used to monitor the progress of the development of products for both Project Manager and Team Manager. A Team plan is not mandatory.

Another plan defined by PRINCE2® is the Exception Plan, which can be at the level of project or stage plan. The Exception plan is created, when there is forecast of tolerance deviation and the relevant authority decides to replace the original plan by an Exception plan.

The Product based planning technique is defined by PRINCE2® to help to create a plan. The Product breakdown structure and Product flow diagram will help to visualize and facilitate preparation of plans by focusing on what will be delivered

1.4.5 Risk

The purpose of the Risk Theme is to identify, assess and control uncertainty and as a result, improve the ability of the project to succeed. Risk in PRINCE2® is a term for any uncertain event, which might influence any of the project objectives. If the influence is negative, this is called a threat, if the influence is positive, it is called an opportunity.

Risk Response is the action taken to reduce or eliminate the influence of the risk on the projector to maximise relevant opportunities.

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Threats are: avoid, reduce, transfer, fallback, accept and share.
Opportunities are share, enhance, exploit and reject.

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1.4.6 Change

The purpose of the change theme is to identify, assess and control any potential and approved changes to the baseline. Since the change must be controlled to avoid “scope creep”, configuration management must be in place to identify versions and variants of the products.

Evaluation of the impact of a change will result in a decision being taken, a scale of priority, severity and level of decision making authority must be defined. PRINCE2® recommends using MoSCoW, which might be defined as following:

Prioritisation	Severity / Decision Authority	
- e.g. MoSCoW scale	- e.g. Alphanumeric/Description	
Must have	4. Critical	Corporate/Programme
Should have	3. Major	Project Board
Could have	2. Significant	Change Authority
Won't have (for now)	1. Minor	Project Manager

Table 1: MOSCOW Prioritization

1.4.7 Progress

The purpose of the Progress Theme is to establish a mechanism to monitor and compare actual achievements against those planned, provide a forecast for the project objectives and the project continual viability and viability of plans. The Progress theme explains, how tolerances might be set up and which authority is authorized to make a decision if the tolerance is forecast to be exceeded set levels.

1.5 PRINCE2® processes

The process is structured set of activities designed to accomplish a specific objective. It takes one or more inputs and turns them into outputs. PRINCE2® defines 7 processes. The processes represent the journey through the project.

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Figure 1: PRINCE2 Process Diagram

1.5.1 Starting-up a Project

Starting up a Project is a pre-project process, where someone's idea or need is considered. It is triggered by the Project mandate, which is provided by commissioning organization, (Corporate or Programme).

The main task to Starting up the Project Process is to evaluate the viability of the project based on high level data to avoid wasting money on initiating badly prepared ideas. The Project Manager prepares high level documents including Outline Business Case and Organization Structure. It defines main delivery of the project, for the Project Product Description, identifies the project approach and prepares the stage plan for the initiation stage. The Project Brief incorporates most information collected during Starting up a Project.

1.5.2 Directing a project

Directing a project is a high level decision making process where the main task is to judge the viability of the project. They need to make the decisions at all key points. The natural decision making points are stage boundaries, but also any time during the project, when major risk or issues arise or there is a forecast to exceed stage tolerances. This situation is called an exception. Directing a project process might also provide *ad hoc* direction any time, when a decision is needed. The main activities of Directing a project are Authorizing Initiation, Authorizing the Project, Authorizing Stage or Exception Plan and Authorizing Project Closure.

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1.5.3 Initiating a project process

The main task of this process is to prepare solid foundations for the project. Only the management products are prepared and they are grouped into a Project Initiation Documentation (PID). These are project-level management products, based on which the Project Board must make a decision about the funding of the project. The PID contains 4 strategies (Risk Management strategy, Configuration Management strategy, Quality management strategy and Communication management strategy). PID also contains the high level Project plan, project controls describing how much the Project Board needs to control the Project Manager (stage boundaries, tolerances, format and frequency of communication, roles description). The Outline Business Case is refined and as a part of the PID gives full information about viability of the investment identifying that benefits will outweigh the costs and risks.

1.5.4 Controlling a stage

This process is done by the Project Manager. The main activity is the authorization of Work packages to the Team Managers, controlling the ongoing work (product development) via Checkpoint reports and accepting completed Works packages after the quality has been reviewed and the product is approved.

The Project Manager must also review the stage status to see whether there is a deviation from the stage plan, if any tolerances are forecast to exceed the approved limits or if issues or risks appeared (or changed their status). The Project Manager usually reviews the stage status on a periodical basis and produces a Highlight Report, which informs the Project Board about the actual status of the stage.

1.5.5 Managing product delivery

This is the process in which a Team Manager accepts the Work package, develops the product or service defined in the Work package, checks the quality of products and regularly informs the Project Manager about the current status of the Work Package in the form of Checkpoint Reports.

When the product is developed, it must be quality reviewed using the Quality Review technique (or any other agreed techniques) and approved. After gaining the approval, the Team manager delivers back the Work package to Project Manager.

1.5.6 Managing a stage boundary

The Project Manager can only continue the work in the next stage, if the Project Board authorises progress. The process in which all the documentation is prepared is called Managing a Stage Boundary. This process formally evaluates the current stage (End stage report is created), plans the work in the next stage and updates the Project Plan, Business Case and if necessary other documents incorporated in the PID.

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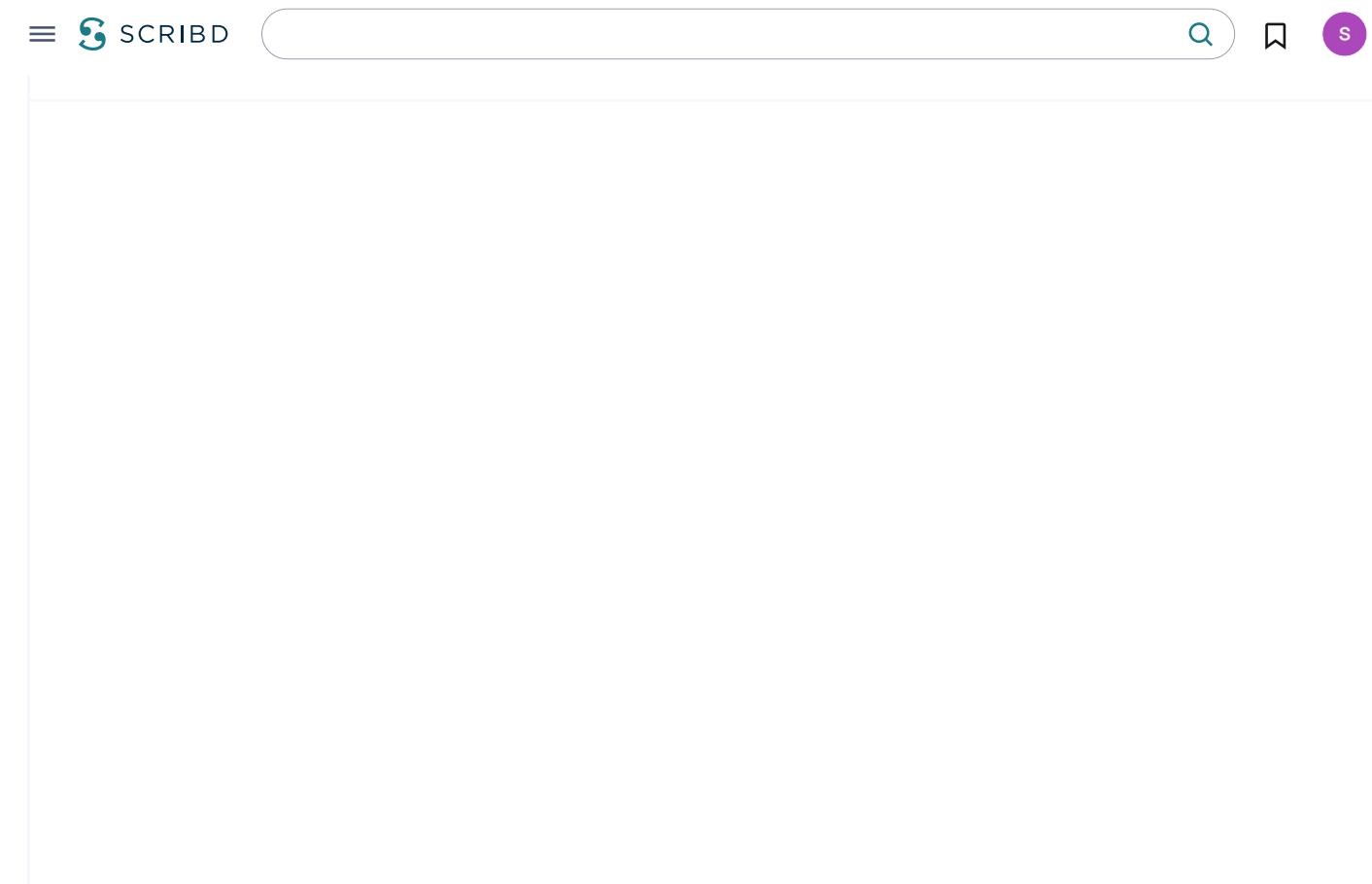


Figure 2: FIX and Flex component

3.2 Why the concept of FIX and FLEX was introduced?

This is driven mainly by fast technology development and shortening of time to market. It may be less important to have a product of highest quality, but is more important to have it quickly. (This eBook certainly will not be perfect in the first issue but brings you value).

Example:

Imagine the mobile phone developer. If it is developed using the “classic” management method, so probably pre-development will last about 6 months when all the features are described in detail. Then developers spend 2 years developing all the features and afterwards, 6 months testing final acceptance. Finally the mobile phone will fulfil all the customer quality expectation and pass the acceptance criteria. So will this project deliver benefits? NO! Would you buy a mobile phone with functionality defined 3 years ago? In an agile environment, the customer defines only basic requirements, like the size of the screen, battery duration, Wi-Fi, GPS etc. But others might be defined later during development, some of them even shortly before launch.

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3.3 Five targets behind flexing what is delivered

There are 5 targets to further explain the concept of fixing and flexing.

	Target	Explanation
1	Be on time and hit deadlines	Being on time and hitting deadlines has many very significant advantages.
2	Protect the level of quality	Ensuring that the level of quality is protected and regarded as vital is of paramount importance to a project. This will lead to a lower cost of ownership through the lifetime of the final product.
3	Embrace change	Embracing change by seeing it not only as inevitable but also as a positive influence on a project allows for a more accurate final product.
4	Keep the team stable and do not add people to a team to try to deliver faster	Keeping team stable over the short term removes the temptation to add people to a team in order to catch up with work when in reality it is more likely to have little or no effect
5	Accept that the customer does not need everything	Accepting the premise that not everything defined in the initial stage of a project must be delivered is wise. It inevitably turns out that somethings do not add enough value to warrant delaying the project because of them.

Table 4: 5 project targets

4. PRINCE2 Agile® principles and behaviors

In order to explain PRINCE2 Agile® principles and behaviours we should briefly describe the Agile approach to project management in general.

According to Highsmith (2002) “Agility is the ability to both create and respond to change in order to profit in a turbulent business environment. Agility is the ability to balance flexibility and stability.”

The IT Industry has been the main driver to create an agile system of product software development. That is why the majority of agile frameworks and techniques originated to manage software development projects.

Fowler and Highsmith (2001).created the “**Agile manifesto**”

“We are uncovering better ways of developing software by doing it and helping others do it. Through this work, we have come to value the following:

- ✓ Individuals and interactions over processes and tools
- ✓ Working software over comprehensive documentation
- ✗ Customer collaboration over contract negotiation

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- ✓ Responding to change over following a plan

That is, while there is value in the items on the right, we value the items on the left more."

There are 12 general agile principles, which originate from different agile frameworks:

1. Our highest priority is to satisfy the customer through early and continuous delivery of valuable software.
2. Welcome changing requirements, even late in development. Agile processes harness change for the customer's competitive advantage.
3. Deliver working software frequently, from a couple of weeks to a couple of months, with a preference for the shorter timescale.
4. Business people and developers must work together daily throughout the project
5. Build projects around motivated individuals. Give them the environment and support their needs, and trust them to get the job done
6. The most efficient and effective method of conveying information to and within a development team—such as a Scrum Team—is face-to-face conversation.
7. Working software is the primary measure of progress
8. Agile processes promote sustainable development. The sponsors, developers, and users should be able to maintain a constant pace indefinitely.
9. Continuous attention to technical excellence and good design enhances Agility.
10. Simplicity—the art of maximizing the amount of work NOT done—is essential.
11. The best architectures, requirements and designs emerge from self-organizing teams.
12. At regular intervals, the team reflects on how to become more effective and then tunes and adjusts its behaviour accordingly.

On top of these general principles, each agile framework defines another principle, which most characterizes the work in the project.

Since PRINCE2® principles are defined and are valid also in an agile environment, PRINCE2 Agile®M defines 5 behaviours, which bring agility into a PRINCE2® project.

1. **Transparency** – the most important elements of this principle come in the form of the common agile values of honesty, trust, integrity and respect. Transparency is not just visibility understood by putting information onto a Progress board (or Kanban board), it is more about revealing and sharing information to everyone, which might be good, as well as bad.

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2. **Collaboration** – is more than just cooperation. Empowered, self-motivated teams work as one unit. Collaboration is about sharing the problems and making common approaches to finding the solution. Collaboration does not mean only internal within the team. It is also external mainly with stakeholders, users and business representatives, to make all of them responsible for the success of the project.
3. **Rich communication** – is much more, than just sending reports to the next level of management. Rich communication is more about face-to-face communication (if teams are not collocated in one place, then using some high tech communication channels if possible with video-camera). It is generally accepted, that more than 70% of communication is non-verbal so the advantage of face-to-face communication is in fast and correct understanding. The strongest tools and techniques of rich communication are daily-stand-ups, planning, reviews and retrospective meetings.
4. **Self-organization** – means trusting the team to organize the work, since they know best how to get the job done. If plans must be created, then invite team members to help doing so. The more they feel, that it is “their plan” the more the plan will be followed. Self organizing creates mutual respect. Therefore, the Project Manager should leave a Team Manager to focus on product delivery and they will do it better if they feel trusted. (Find the relations between the Project Manager, Team Manager, Scrum Master and teams in chapter 8).
5. **Exploration** – is about learning and feedback. In order to create the right thing it is necessary first to know, what the right thing is. Learning helps to improve the products. It is usually by using experiments, prototypes, spikes help to understand the customer expectations, get quick feedback and reduce the impact of mistakes. The faster, better feedback the team gets, the quicker progress can be made. The sooner the team solves “known unknowns” and uncovers “unknow unknowns” the sooner they can arrive at the right destination.

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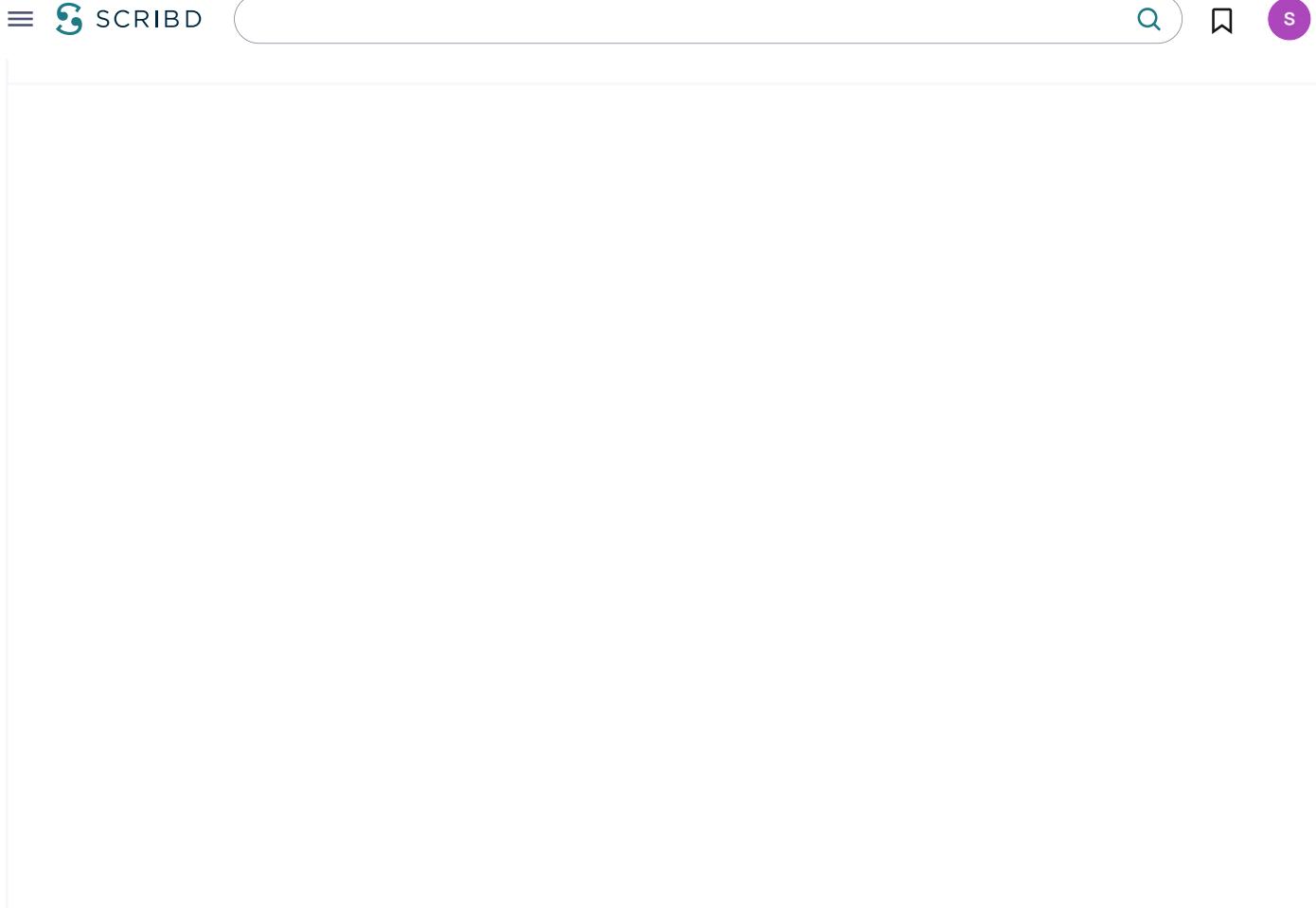


Figure 3: Agile project Behaviours

4.1 Typical agile behaviours, concepts and techniques

Term	Examples	Similar term
Behaviours	Being collaborative, self organizing, customer focused, empowered, trusting not blaming	Principles, values and mind-set
Concepts	Prioritizing what is delivered, working iteratively and incrementally, not delivering everything, time focused, inspect and adapt, limiting work in progress	Fundamentals
Techniques	Burn chart, user stories, retrospectives, time-boxing, measuring flow	Practices, tools

Table 5: Agile behaviours, concepts and techniques

5. Cynefin and Agilometer

Before the project manager starts the project, they must understand how complex the system is and which risks exist implementing an agile approach.

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5.1 Cynefin

To measure the level of complexity – the Cynefin framework was created by David Snowden. It is decision making framework that has been designed to help with understanding and determining what level of complexity exists in given situation or environment.

There are 5 defined relationships:

Obvious – where the relationship is obvious and is usually addressed by “best practice”

Complicated – where some form of analyses or expertise is required to understand the relationship, which is usually addressed by “good practice” but where there might be several options available.

Complex – where the relationship can only be understood in retrospect and is addressed by “emergent practice” which may evolve to a new way of working

Chaotic – where there is no apparent relationship and any way of working is described as novel

Disorder – where the relationship is unknown

Figure 4: Cynefin

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5.2 Agilometer

The task of the Agilometer is to best estimate different areas of risk when applying agile project management. Every project situation is different in some form due to factors such as the level of trust between the customer and supplier, the technology being used or level of uncertainty.

In order to receive the most benefit from using a method or approach it is essential to adjust and adapt it to suit the context and conditions in which it is operating.

For PRINCE2® to be tailored in the most suitable way it is important to assess the context that a project exists with regard to the environment and the working relationships. To achieve this, PRINCE2 Agile® has an assessment tool called Agilometer to answer the question “How Agile can we be on this project”?

The Agilometer looks at 6 key areas and the Project Manager is responsible for canvassing the key stakeholders involved in the project as to what values to give each category. Each category is represented on the figure by a slider.

Figure 5: Agilometer

The experience of the Project Manager will dictate, how each slider is set and the situation evaluated. It is not possible to make any kind of “average” agility and each considered in isolation.

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5.2.1 When the environment is Agile (5 on the slider)

1. Flexibility of what is delivered

Customers understand that not everything is going to be delivered; that changes might appear and these changes should be incorporated into the project. The Customer is familiar with a prioritization technique (e.g. MoSCoW) and is willing to participate actively to prioritize products or features.

2. Level of collaboration

The team is “set-up”, produced excellent results in the past, there are not “unresolved” conflicts, team members accept positive critique and accept that they make mistakes, people work quickly, effectively and help each other, they are used to working in a partnership environment between the customer and supplier

3. Ease of communication

Communication is informal and easy among all parties involved, people are used to face-to-face communication, used to working with prototypes and models. There is a high level of visibility of progress, plans and results (mainly via a progress board, issue and risk logs), people are collocated or at least a high level of visual communication technology is introduced. Formal communication and reporting is limited.

4. Ability to work iteratively and deliver incrementally

Benefits to the customers should be delivered in partial deliveries, work is done iteratively and refined in the later stages, there is experimenting and exploring and failures present significant learning and improvement options. Everybody understands, that the thing might not be perfect the first time, incremental delivery brings quick and frequent feedback which increases the deliverability and benefits to the customer.

5. Advantageous environmental conditions

The overall working environment is very supportive of working in an Agile way. People are assigned full time working on the project, they have appropriate skills, teams are stable and experienced. Any external parties are comfortable working in an Agile way, Agile tools are used and commercial and contractual environment is favourable to an Agile way of working.

6. Acceptance of Agile

All stakeholders involved in the project are fully aware of the behaviours, concepts and techniques of working in an Agile way and they fully understand the advantages which an Agile way of work brings. Peripheral stakeholders are also aware of the need to carry out their roles in an “Agile friendly way”. People

ned in the appropriate approach and there are no blockers to using Agile

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6. Vision, user stories, products

PRINCE2® and Agile in general use different vocabulary, though there are usually similarities in what is described.

6.1 High level product description

PRINCE2® uses the term “Project Product”, which is the main delivery of the project, including Customer Quality expectations and Quality criteria.

Agile frameworks usually use the term “Product Vision” (or in certain circumstances “Project Vision”). The format might be following:

For:	«target customer»
Who:	«needs»
The:	«product name»
Is a:	«product category»
That:	«product benefit. Reason to buy»
Unlike:	«competitors»
Our product:	«differentiation or value proposition»

This is a high level description of project delivery, which answers what the customer needs and why it is needed unlike the “Project Product Description”, The Product Vision does not contain any quality or acceptance criteria, but it doesn't mean, that it cannot contain them. If, they are included they should be vague enough to give the Project Manager flexibility in prioritizing, what is delivered.

6.2 Products, Epics and User stories

Low level deliverables in PRINCE2® are called products – in this case “Specialists products” (there are also management products such as plans, reports, strategies and specialist products delivered by the development teams). The work in PRINCE2® is assigned in the form of Work Packages to Team Managers. The Work Package might contain 1 or more products. Products are usually at a low level of granularity and are not split into parts by a Project Manager but are delivered as a unit. The process of splitting Project Product into products is called “Product Breakdown Structure”. The products in between are called “major products”. Plans in PRINCE2® contain the information about, which products should be manufactured, when, by whom, at what cost etc. The Quality of each developed product is measured prior its delivery (Quality Review technique can be used).

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An Agile way of working splits the Product Vision into Epics and User Stories. (Epics are large User Stories, which cannot be delivered in 1 sprint, but must be further split into User Stories). A User Story is a lucid form, in which any requirement is presented.

The typical format for a User Story is:

As a <type of user>,
I want <to perform some task>
so that I can <achieve some goal/benefit/value>

So User Stories have the perspective of how the user, system administrator, developer etc. see the benefits, rather than detailed specification.

Example:

MobiParts – a Shopper sells spare parts for mobile phones to different services and wants to extend sales to end users.

Product vision:

For: «MobiParts»

Who: «need to sell products to end users and enlarge the market»

The: «web page will be created»

Is a: «an e-shop»

That: «enables any users to search, order, buy, evaluate and communicate about spare parts»

Unlike: «Chinese sellers»

Our product: «will have a much wider offer, detailed descriptions, standard 2 year warranty, national delivery and a helpdesk option»

Example of Epics:

As a buyer, I want to have the facility to pay online, so that I can quickly purchase any product.

As a website administrator, I want to have statistics about all visitors and buyers so that I can flexibly change my marketing strategy.

As a web administrator, I want to see, how many products were bought in a certain period, so I can track the stock.

Use stories:

As a buyer, I want to pay using PayPal, so I can revoke my purchase, if I am not satisfied.

As a web administrator, I want to see how many product were bought in certain period so I can fill the stock.



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It must be realized, that there are functional and non-functional requirements (user stories.) Functional describe what user story does, non-functional how well it is done. User stories therefore should be created not only by the customer, but also in close cooperation with the development team.

6.2 Prioritized product backlog

It is not necessary to split all Epics into User Stories at the beginning of the project. It is not even necessary to define all User Stories, since some of them can be omitted or even some of them will come later in the process.

In any case, all of them must be prioritized, so the team knows, which of them provide the greatest value to the customer, and so which of them should be manufactured first.

In Scrum, the Product Owner (assisted by the Scrum Master and the Team), is responsible for prioritizing the Product backlog. This concept has all responsibility for the customer view focused on one person. Therefore the responsibility for prioritization should be from a wider stakeholder representative, since they might bring new points of view, skills and knowledge.

The Product backlog is not only prioritized at the beginning, but it is a continued periodical process as some items are delivered and new items might be added than priorities might be changed.

When taking into account project risks and their influence on the product backlog (the bigger risk, the higher priority), a **Risk prioritized product backlog list is produced.**

6.3 User stories and tasks

The Development team commit to some user stories at the beginning of sprint, which are further prioritized, estimated and split into tasks. This is the task of the development team with the assistance of other stakeholders, such as the Project Manager, stakeholders etc. Once the development team commits to work on specific user stories during the sprints, no-one external should influence their work. The only exception is a situation where significant change appears and there is no longer any sense to continuing work on these user stories and the sprint should be prematurely closed.

Example of Task:

User story:

As a buyer, I want to pay using PayPal, so I can revoke my purchase, if I am not satisfied.

Tasks:

1. Find the recent PayPal API (Web services)
2. Create test account
3. Test the payment on the test account

→ the real account
the payment on the real account

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6.4 Prioritization and estimation

As previously mentioned, requirements and relevant user stories must be prioritized once they are placed on the product backlog. One of the most popular prioritization method is MoSCoW. It represents the acronym for Must have, Should have, Could Have and Won't have for now. When prioritizing requirements we only need to answer the question; how important is it?

Must - means that without delivering this requirement the project would not deliver any value or meet the Business Case or Product Vision.

Should –an important feature, but the final product can deliver value without it, although it would be costly or take a long time to add the feature later.

Could – less important feature and probably majority of customers will not need it. It would be an easier or less costly to include in a future release.

Won't have for now – users can easily cope without it or it is not required to deliver Product Vision.

Example:

What should our website contain?

Product descriptions with **MUST** – product description
images **SHOULD** – images (buyer can probably buy the product from the description. Many products do not have images)

Ordering or putting in to the Shopping cart **MUST** – it is the only way to buy something

Editing the shopping cart **SHOULD** – if a buyer cannot edit the shopping cart, he can delete it and put the item in again

Different ways of payment **MUST** – for one type of payment
SHOULD – for more ways of payment
COULD – payment on delivery

Setting delivery address **WON'T HAVE** – sending a check to shop
MUST – it is the only way to deliver the order to the customer

COULD – personal pick up from the shop
WON'T HAVE – it is of very low priority
COULD – people might find reviews on other websites

Creating a profile **MUST/COULD** – depending on the customer preference. Some buyers might buy the product without creating a profile

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Though MoSCoW is probably the most common **prioritization technique**, but there are many others used in agile projects such as:

- **100 point method** – customers get 100 points and vote for the features that they feel are most important
- **Monopoly money** – customer gets “false money” and must decide, how much they are willing to pay for each user story
- **Kano analyses** – used mainly when new products are being produced
- **Relative prioritization** – comparing 2 user stories and deciding, which of them is more important

Estimation is used primarily by the development team to get an idea, of the difficulties of each user story, and when the user story is split into tasks, how much effort each task will require

The Following **estimation techniques** are described in Scrum:

- **Planning poker** – usually requires consensus of team members. Each team member gets cards numbered in sequence (e.g. 1,2,3,5,8,13,21..) and estimates the difficulties of each task.
- **First of Five** – it is a voting technique by showing fingers. 1 finger means disagreement with the group conclusion and 5 fingers means agreement with the group conclusion. Fingers 2-4 mean, I do not fully agree/disagree and I am ready for discussion
- **Relative sizing/Story points** – the team will estimate, which story is relatively simple and this story “costs” 1 point. Other stories are judged relative to the first story. The result might be for example “5”, which means that this story is 5 times more difficult than the first story.
- **Wideband Delphi** – this is also well-known techniques. It is a group-based technique, but all members of the group make anonymous estimates.

6.4.1 Transforming requirements to User stories

It is not easy to write good user stories. “INVEST” mnemonic can help. The meaning for different letters represent:

- I **Independent** The user story should be self-contained, in a way that there is no inherent dependency on another user story.
- N **Negotiable** User stories, up until they are part of an iteration, can always be changed and rewritten.
- V **Valuable** A user story must deliver value to the end user.

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You must always be able to estimate the size of a user story.

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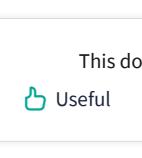


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