# Agile Delivery Methodo​​logy

# iPipeline's Agile Delivery Methodology

This overview provides a summary of​ the approved iPipeline Implementation Methodology for all PS Projects.   It is intended to be used as a guideline, and deviated from when it does not make sense for the activity. All employees are encouraged to contribute to the continuous evolution of the process.​​​

Картинка methodology\_desc

The Build Phase​

This phase is where the project team builds the solution.  The PM doubles as the Scrum Master.  An overview of the [Planning, Release and Sprint Process](https://ipipeline.sharepoint.com/sites/ProfessionalServices/Shared%20Documents/PS%20Agile%20Delivery%20Methodology/Checklists,%20Samples%20and%20Processes/Practice%20Principles%20-%20Releases%20Sprints%20and%20Scrums%20-%20Master.docx)​ is described here.

**Release Planning** is where we estimate the WHOLE release

**SPRINT** **Planning** is where we refine/confirm & COMMIT Stroies, Capacity based on what we have learned to date and any new data

**Grooming**should happen 2-3 Sprints before the start of Sprint, and this is where you compre prepared to discuss estimate and elaborate on Requirements

**Scope Overview** is where we engage the Client to walk through the Sprint Requirement (Should happen right ebfore the Start of Sprint, and if we get a Surprise, we should swap a Story - 1 good reason to Groom 2-3 Sprints ahead)

Scrum Project Management

Scrum Project Management is used at iPipeline to manage our client implementations.  Sprints are delivered to the client every 2 weeks for functional testing. The team should leave some time in each sprint to address feedback from the client.  A quality checkpoint ([Definition of Done](https://ipipeline.sharepoint.com/sites/ProfessionalServices/Shared%20Documents/PS%20Agile%20Delivery%20Methodology/Checklists,%20Samples%20and%20Processes/iPipelineProfSvcsDefinitionOfDone.docx)​) is required prior to pushing to UAT.   Stories should be worked until DONE, which mean when you get to the end of the SPRINT, you have most if not all Stories ready for delivery.  So if for some reason you fall behind, you can still deliver the completed stories (Better to delivery 80% of your stories 100% complete, rather than 100% of stories only 80% complete)​

**ANY team member can declare a Sprint not ready for UAT.**

Release Plan

A [Release Plan](https://ipipeline.sharepoint.com/sites/ProfessionalServices/Shared%20Documents/PS%20Agile%20Delivery%20Methodology/Initiation%20Phase/Release%20Plan%20Example.pptx)​ is created prior to starting the Build Phase.  See the [Release Calendar](https://ipipeline.sharepoint.com/sites/ProfessionalServices/Shared%20Documents/PS%20Agile%20Delivery%20Methodology/Build%20Phase/AGILE%20Calendar%20Example.xlsx) for when Sprint Planning and Grooming should occur, and see the [“Agile Back to Basics”](https://ipipeline.sharepoint.com/sites/ProfessionalServices/Shared%20Documents/PS%20Agile%20Delivery%20Methodology/Checklists,%20Samples%20and%20Processes/AGILE%20Back%20to%20Basics-%20Meeting%20Goals.docx)​document to understand the prerequisites for these meetings.

The workflow and BRD are the guides to the system flow.  The integration document are the technical specifications, and are owned by the developer. These should be review and approve by the client 1-2 sprints before the deliverable is due.

Retrospective Meeting

A short Retrospective Meeting is held to discuss lesson learned, and provide input to improving the process for the next sprint. This is done within the following sprint.  For 2 week Sprints, this should be a 15 minute meeting.  One item should be agreed upon by the team to work on until all agree the team has mastered the area.​

# Sprint Activity Details

## Scope Overview

The first agile ceremony is reviewing the scope overview.  This activity gets the team understanding the customer expectations for the goals (stories) for the next sprint.

Rules:

1. **Review the Project Workflow**- view the workflow of the project to see specifically what the team has completed in the project and what is related to the Stories that we are reviewing in the next Sprint
2. **Review with the whole team and Customer**:  teams should have the chance to ask questions and get immediate results
3. **Understand what DONE looks like for the Story**:  you can capture this in plain English for each Story
4. **Plan for any answers you cannot get immediately**- we should have everything answered for Grooming ​

## Grooming

The second agile ceremony is grooming.  This activity gets the stories ready for planning into a sprint.

Rules:

1. **Review the Project Workflow**- view the workflow of the project to see specifically what the team has completed in the project and what is related to the Stories that we are reviewing in the next Sprint
2. **Revisit the answers for any outstanding questions on the Stories**- we should have everything answered for Grooming
3. **Review each Story and ensure it is Ready**: with the correct Tasks/Owners/Hours in V1
4. **Add any additional Stories needed**
5. **Plan for any answers you cannot get immediately**- we should have everything answered for Sprint Planning ​

## Sprint Planning

The third agile ceremony is sprint planning.  This activity gets commitment from the Team on completing the goals planned out for the next Sprint

Rules:

1. **Plan Team Member Capacity  (JIRA Agile:  Capacity Planning)**
   * Each team member should be able to provide their capacity (number of hours they can work on those Sprint goals/for that team/during that Sprint
   * We should have a rolling 3 Sprints worth of capacity loaded in V1 at all times
2. **Verify the Sprint Stories  (JIRA Agile:  Detail Planning)**
   * Move all incomplete Stories over from previous Sprint (or place them in the backlog)
   * Check all Stories in the current Sprint are Ready with correct Tasks/Owners/Hours
3. **Ensure Members hours are Balanced (JIRA Agile:  Member Planning)**
   * ​​Compare the Capacity hours and the To Do hours for each Team Member and adjust their tasks to create an amount of work they can complete within the Sprint
4. **Get Commitment from the Team**:  ask the team, each team member, if they commit to completing the stories (goals) planned out in the Sprint.  Remember- we want to hold the team and each other and ourselves to that commitment throughout the Sprint​

## Daily Scrum

The forth agile ceremony is scrum.  This activity gives the team members the ability to report out progress and allows the PM/Scrum Master to answer the question, Are we going to complete out Sprint Goals?

Rules:

1. **Only talk about Sprint Goals** (Sprint Stories and Tasks)
   * Visually want to connect to the tasks and stories in JIRA Agile (Skype, point with your mouse, have people point to what they are talking about on the projector)
   * Stop extra discussion on meetings, trainings, days off, and planning- save that until the reserved time at the end
   * The questions you need to be asking are:
     + What did you do yesterday that moved your Sprint Goals forward?
     + What is your plan for today to move your Sprint Goals forward?
     + What are any impediments (or potholes) that are/have prevented your Sprint Goals from moving forward?
   * To use a football metaphor- your team has 10 days to move the ball down the field and score.  Each day we should have a good understanding of whether the ball has moved ten yards and whether we are on track to score.
2. **Only 15 mins** (this is a must, if you do step #1 well this will be easy)
   * Set google timer if you need to be reminded.  If you don’t finish with everyone’s updates then start with those people the next day.  The goal is to be efficient with that 15 minutes.​
3. **Burndown view as last point**
   * How else are you going to know if you are going to complete your Sprint Goals unless as a team you are viewing the burndown and coming up with a plan to “get back to the line” each day
4. **Reserve time after scrum for “plan” or “hot/hot list”**
   * Make sure you are discussing the plans for the following each day:
     + Impediment removal
     + When/how are the teams connecting
     + Plan to get back to the line on the burndown
   * Is there a list of items that you should be reviewing with the team outside the Sprint Goals?  What better time than to have them reviewed with the team following the scums?
5. **Prepare prior to scrum**(both SMs and team members)
   * Check JIRA Agile, JIRA, Hot/Hot List, Burndown etc. prior to scrum starting to gather questions around hitting Sprint Goals​

## Sprint Review

The fifth agile ceremony is the sprint review.  This activity gives the team members, customer and other stakeholders the ability to see the deliverables and gives them the ability to review / inspect the sprint.

Rules:

1. **Start with Review of Retro Action plan from Previous Sprint**
   * Did we m​ake any progress with this action item
2. **Metrics need to be reviewed**:
   * Sprint Success Rate (number of stories vs. stories completed successfully)- a.k.a. did we complete what we said we were going to do in Sprint Planning
   * Review Estimates vs. Actuals- are we under or over estimating consistently?
   * Review number of stories completed trends
   * Review Stories Not Completed
   * Review Burndown​

## Sprint Retrospective

The last agile ceremony is the sprint retrospective.  This activity gives the team members the ability to voice ideas for continuous improvement.

Rules:

1. **Record items to Start/Stop/Continue**
2. **Select 1 item**that is the most important for the team to tackle for the next Sprint
   * Team V​otes (either by casting a vote, or yelling the loudest or something- have fun with it)
3. **Create Action Plan** around improving that one thing by asking the team (or each person) what can you do next Sprint differently that will effect this item)
   * Get real answers
   * Get buy-in from the team
   * Get results of what DONE looks like for this item
   * Get going! ​

## Definition of Done Process

What it is:

* A checkpoint milestone designed to have the team come together and do an assessment of how ready sprint deliverables are for deployment to UAT or Prod.

What it is not:

* It is not an audit of doneness at the story level, it is at the sprint level.
* It is not meant to be an exhaustive audit of deliverables
  + It is a team assessment of did they get done what they said they were going to do.

A DoD is to be held prior to pushing software to UAT adn ideally the DoD’s will be held on Day 9 of each sprint.

* There are exceptions to the Day 9 rule if an off-cycle UAT push is needed

​Sprint Calendar – (выслала картинку и эксель)

During a sprint, several agile ceremonies are conducted.  ​Those key ceremonies are detailed below.    Scroll down to access more details about each activity.

* Scope Overview
* Grooming
* Sprint Planning
* Daily Scrum
* Sprint Review
* Sprint Retrospective
* Definition of Done Process

# [Final UAT - End to End Testing Overview](https://ipipeline.sharepoint.com/sites/ProfessionalServices/SitePages/Final%20UAT%20-%20End%20to%20End%20Testing%20Overview.aspx)

## End to End Testing Phase

​This phase begins when all the development sprints are complete and all features have been built and tested by the client.  This final test is a Regression Test of the system.  It is also the complete end-to-end test, including integration testing of points such as: SSO, submissions to Carriers, Paramedical companies, as well as disconnected.

A [Master Test Plan](https://ipipeline.sharepoint.com/sites/ProfessionalServices/professionalservicesus/quality/Shared%20Documents/Testing%20Artifact%20%26%20Presentation%20Templates/iPipelineProfSvcsMasterTestPlan-Template-Effective-Aug24th2017.docx)​ is created at the start of the project to ensure all aspects of the system are tested.  ​During this stage preparation for production is required.  The procedures to setup a new client in production, as well as the basic steps needed to release to production and included in the [Production Release Procedure](https://ipipeline.sharepoint.com/sites/ProfessionalServices/Shared%20Documents/PS%20Agile%20Delivery%20Methodology/Checklists,%20Samples%20and%20Processes/iPipeline%20Velocity%20General%20SaaS%20Production%20Release%20Procedure.docx) document with a sample [Production Release Task](https://ipipeline.sharepoint.com/sites/ProfessionalServices/Shared%20Documents/PS%20Agile%20Delivery%20Methodology/Production%20Phase/INTERNAL%20PROD%20READINESS%20%20Implementation%20Task%20Plan.xlsx) list here.

The PM is responsible for informing the support teams when a new client or product to an existing one is being added to production for a client.  The implementation to [Support Turnover Guidelines](https://ipipeline.sharepoint.com/sites/ProfessionalServices/Shared%20Documents/PS%20Agile%20Delivery%20Methodology/Checklists,%20Samples%20and%20Processes/New%20client%20onboarding%20Support%20Process.pptx)​ will guide you through this process.​​ (ЗДЕСЬ ССЫЛКА НА ПРЕЗЕНТАЦИЮ NEW CLIENT ONBOARDING)

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| A​​gile Implementation Methodology Team Roles​ |

More details about each of the team roles can be found in the [PS Roles and Responsibilities](https://ipipeline.sharepoint.com/sites/ProfessionalServices/Shared%20Documents/PS%20Agile%20Delivery%20Methodology/Checklists,%20Samples%20and%20Processes/PS%20Role%20and%20Responsibilities.docx).

**Project Manager**

* Team Leader / Scrum Master
* Follows methodology while guiding team and project
* Conducts Daily Scrums
* Removes barriers or obstacles from team
* Works with team to plan project
* Owns project plan
* Uses plan to manage tasks and track progress
* Manages customer expectations
* Oversees the Change Control process for project scope changes
* Manages Projector for resource planning and financial planning.   See [Managing Projector](https://ipipeline.sharepoint.com/sites/ProfessionalServices/Shared%20Documents/PS%20Agile%20Delivery%20Methodology/Checklists,%20Samples%20and%20Processes/2016%20Projector%20Manual.docx)​ for more information.​

**Business Analyst (Product Owner)**

* Workflow Diagram
* Grooming Meetings
* Create/Maintain Requirements/Specification Documentation
* Screen Design and Mockups
* iGO Mapping
* Task Estimation for BA tasks
* Lead Sprint Reviews
* Identifies Scope Changes
* Ensures Best Practice are followed
* Analyze/Test Customer Service Issues
* Owns solution quality – ensuring Testers know how to comprehensively and efficiently test

**Developer**

* Develop screen layouts based on rules from a BRD (this can also be done by a BA)
* Develop client side screen rules based on rules from a BRD
* Develop business rules in a custom assembly or InRule
* Attend daily scrum meetings and provide updates to PM and team
* Provide estimates for projects
* Unit Testing
* Codes integrations

**Junior/Senior QA**

* Test Plan Creation
* Review Customer Test Plans and align with Project Plans
* Test Matrix Creation
* Testing
* Quality Status Reporting

**Solution Architect**

* Review / Assess project for implementation risks and issues
* Identify Best Practices and emphasize best approach to project team
* Identify base/non-standard requests which impact schedule / timeline
* Identify up-sell opportunities and potential consulting services (forms redesign, workflow analysis)

Arti​facts, Checklists and Reference Documentation

**Пришлю отдельные файлы на ознакомление**