# 📘 Chapter 1 — Introduction

## **1.1 Purpose of this Handbook**

The AgilePM® v3 Handbook is intended to serve **three primary audiences**:

1. **Project Practitioners** – team members, Scrum Masters, Business Ambassadors, and PMs.
2. **Business Leaders & Sponsors** – executives, PMO managers, and product owners seeking value-driven delivery.
3. **Organizations** – companies implementing Agile at scale or integrating hybrid governance structures.

### **Objectives:**

* Provide **comprehensive, practical guidance** for AgilePM v3 application.
* Support **training and certification** preparation.
* Deliver **real-world examples, templates, checklists, and metrics**.
* Enable **organizational maturity assessment** and continuous improvement.
* Provide **cross-industry guidance** for regulated and non-regulated projects.

### **Table 1 — Handbook Purpose Summary**

| **Audience** | **Objective** | **Key Benefits** | **Expected Outcome** |
| --- | --- | --- | --- |
| Practitioners | Learn AgilePM principles & practices | Structured delivery guidance, templates, best practices | Higher quality, predictable delivery |
| Sponsors/Execs | Align projects with strategic goals | Transparency, ROI tracking, reduced risk | Informed decision-making |
| Organizations | Implement Agile governance | Hybrid approach, faster value delivery | Scalable, controlled Agile adoption |

**Extended Explanation:** This handbook goes beyond theory. Each chapter includes **concept explanations, real-life scenarios, exercises, and actionable templates**. It is designed for **hands-on use in live projects**, not just as academic material.

## **1.2 What Is AgilePM v3?**

AgilePM v3 is a **structured, scalable Agile project management framework**. Built upon DSDM, it has evolved to include:

* Integration with **Scrum and Lean practices**.
* Emphasis on **governance, compliance, and risk management**.
* Guidance for **planning, estimation, and prioritization**.
* Clear definition of **roles, responsibilities, and accountability**.
* Lifecycle phases tailored for **medium to large projects**.

### **Table 2 — AgilePM v3 Key Characteristics**

| **Feature** | **Description** | **Value** |
| --- | --- | --- |
| Lifecycle Phases | 6 phases (Pre-Project → Realisation) | Ensures structured governance |
| Core Principles | 8 principles focused on value, quality, collaboration | Guides consistent decision-making |
| Roles | Sponsor, PM, Business Ambassador, Team | Clear ownership & accountability |
| Work-Products | Defined artifacts per phase | Standardization & auditability |
| Governance | Integrated checkpoints & approvals | Regulatory and stakeholder compliance |
| Estimation Techniques | Planning Poker, Relative Sizing, Velocity | Accurate forecasting & risk mitigation |

## **1.3 Why AgilePM v3 Is Relevant Today**

Modern organizations face **complex, rapidly changing environments**, including:

* **Rapid time-to-market** requirements.
* **High customer expectations**.
* **Regulatory pressures** and audit requirements.

AgilePM v3 balances **flexibility and control**, solving issues where traditional Waterfall or Scrum-only approaches fail.

### **Table 3 — Challenges vs AgilePM Solutions**

| **Challenge** | **AgilePM v3 Solution** | **Benefit** |
| --- | --- | --- |
| Rapid delivery | Timeboxed iterations | Shorter cycles, early ROI |
| Stakeholder alignment | Collaboration workshops | Reduced conflicts & higher satisfaction |
| Compliance & regulation | Governance checkpoints | Audit-ready documentation |
| Evolving requirements | MoSCoW prioritization | Focus on business value |

## **1.4 AgilePM v3 Core Values**

AgilePM v3 embodies **four foundational values**:

1. **Deliver Value Early and Frequently** – iterative delivery for measurable outcomes.
2. **Collaborate Continuously** – workshops, daily communication, stakeholder engagement.
3. **Maintain Transparency & Governance** – checkpoints, dashboards, clear roles.
4. **Adapt Based on Evidence** – inspect-and-adapt cycles after each timebox.

### **Table 4 — Core Values in Practice**

| **Value** | **Application** | **Example** |
| --- | --- | --- |
| Deliver Value Early | Incremental delivery | MVP after 2 timeboxes |
| Collaborate Continuously | Workshops, stand-ups | Cross-functional decisions |
| Transparency & Governance | Dashboards, reports | Sponsor oversight |
| Adaptation | Feedback-driven iteration | Scope reprioritization post-review |
| Quality-Focus | Built-in QA, definition of done | Reduced defects & rework |

## **1.5 Benefits of AgilePM v3**

### 🌟 Organizational Benefits

* **Alignment of strategy & execution**.
* **Predictable outcomes without sacrificing speed**.
* **Enhanced transparency and risk visibility**.

### 🤝 Team Benefits

* **Clear roles & responsibilities**.
* **Structured planning & execution**.
* **Higher engagement and morale**.

### **Table 5 — AgilePM v3 vs Other Frameworks**

| **Framework** | **Strengths** | **Limitations** | **AgilePM v3 Advantage** |
| --- | --- | --- | --- |
| Scrum | Iterative, team autonomy | Lacks governance | Lifecycle + governance |
| PRINCE2 | Strong governance | Rigid, slow | Agile flexibility + governance |
| PMI/PMBOK | Process rigor | Heavy documentation | Lightweight, iterative |
| DSDM | Early value delivery | Outdated terminology | Modernized framework with Scrum alignment |

**Extended Explanation:** AgilePM v3 provides **practical hybrid methodology**, retaining Scrum’s agility while integrating **enterprise governance, risk management, and compliance**.

## **1.6 Changes from AgilePM v2 to v3**

### **Table 6 — Version Comparison**

| **Aspect** | **v2** | **v3** | **Benefit** |
| --- | --- | --- | --- |
| Lifecycle Phases | 5 | 6 | Improved governance & phase clarity |
| MoSCoW | Original rules | Updated | Reduces prioritization errors |
| Roles | Legacy titles | Modernized + Scrum alignment | Better clarity & accountability |
| Estimation | Basic | Planning Poker + Velocity | Accurate forecasts |
| Governance | Implicit | Explicit checkpoints | Regulatory compliance & audit-ready |

## **1.7 When to Use AgilePM v3**

AgilePM v3 is ideal for:

* **Medium to large projects**.
* **Regulated industries** (finance, energy, healthcare).
* **Complex multi-team projects**.
* **Digital transformation initiatives**.

### **Table 7 — Suitable vs Non-Suitable Projects**

| **Scenario** | **Recommended** | **Not Recommended** |
| --- | --- | --- |
| Digital platform delivery | ✅ | ❌ |
| Multi-team project | ✅ | ❌ |
| Small, operational change | ❌ | ✅ |
| Fixed, non-negotiable scope | ❌ | ✅ |
| Regulatory compliance project | ✅ | ❌ |

## **1.8 Handbook Structure Overview**

The handbook contains **12 Core Chapters + 5 Appendices** covering topics such as: Principles, lifecycle, Scrum alignment, roles, planning, risk, and governance.

### **Table 8 — Handbook Structure Overview**

| **Section** | **Content** | **Key Deliverables** | **Tools/Templates** |
| --- | --- | --- | --- |
| Chapters 1–12 | Concepts, lifecycle, roles, planning | Knowledge, practical guidance | Checklists, dashboards |
| Appendix A | Work-products | Standardized artifacts | Templates |
| Appendix B | PAQ | Project approach assessment | Questionnaire |
| Appendix C | Estimation | Forecasting tools | Planning Poker & Velocity |
| Appendix E | Case study | Full project example | Applied templates & checklists |

## **1.9 How to Use This Handbook**

### **Table 9 — Handbook Usage Matrix**

| **Usage Type** | **Example Activity** | **Benefit** |
| --- | --- | --- |
| Learning | Study lifecycle & exercises | Certification readiness |
| Delivery | Apply timebox plan | Practical project control |
| Governance | Complete PAQ | Risk & compliance visibility |
| Team Training | Conduct workshops | Skill building |
| Continuous Improvement | Lessons learned review | Process optimization |
| Reporting | Dashboards | Visibility for executives |

## **1.10 Key AgilePM Principles Overview**

AgilePM is based on **8 guiding principles**:

| **Principle** | **Description** | **Practical Impact** |
| --- | --- | --- |
| Focus on business need | Prioritize features delivering value | ROI maximized |
| Deliver on time | Timeboxing | Deadlines met |
| Collaborate | Teams & stakeholders work together | Higher engagement |
| Never compromise quality | Built-in QA | Fewer defects |
| Build incrementally | Deliver in small chunks | Faster feedback |
| Develop iteratively | Inspect & adapt | Continuous improvement |
| Communicate continuously | Daily stand-ups, workshops | Transparency |
| Demonstrate control | Governance & checkpoints | Compliance & audit |

## **1.11 Additional Concept Summaries**

### **Table 11 — Roles & Responsibilities**

| **Role** | **Primary Responsibility** | **Example** |
| --- | --- | --- |
| Sponsor | Strategic alignment, approve PAQ | Executive sign-off |
| PM | Delivery, planning, risk | Oversees timeboxes |
| Business Ambassador | Represents business | Prioritizes MoSCoW items |
| Technical Coordinator | Architecture & quality | Ensures standards |

### **Table 14 — Governance Checkpoints**

| **Phase** | **Checkpoint** | **Key Decisions** | **Participants** |
| --- | --- | --- | --- |
| Pre-Project | Approval | Business case | Sponsor, PM |
| Foundations | Stage Gate | Release plan approval | PMO, Sponsor |
| Deployment | Go-Live | Operational readiness | Team, Sponsor |

### **Table 17 — Metrics Overview**

| **Metric** | **Definition** | **Frequency** |
| --- | --- | --- |
| Velocity | Story points completed/timebox | Each timebox |
| Forecast Accuracy | Planned vs delivered | Release-level |
| Quality | Defects per iteration | Continuous |