

# AGILE PROJECT MANAGEMENT

INITIATIVES & THEMES

Initiatives are the next level above an epic, so they're essentially groups of epics

**Initiatives >> Epic >> User Story**

Initiatives are higher-level business priorities or big projects potentially spanning multiple teams

**Jira Align** is a great tool to manage initiatives where the user can combine the work from multiple agile teams and roll them up into larger initiatives



Themes are organization-wide focus areas which generally run in parallel to the strategic objectives of the organization  
They answer the question:

**“What do you want to do in the next 6-12 months?”**

Themes essentially categorize or label the backlog by strategic focus areas, value streams, or investment categories and are great for stakeholders to see where the organization is spending time vs. what was planned

## EXAMPLE OF THEME

“Use Streaming Videos”

An example of a theme could be “Use Streaming Videos” with the initiatives under this theme as “Use Streaming Videos for product X, Use Streaming Videos for product Y and Use Streaming Videos for product Z.”



## KEY FACTS ABOUT THEMES

Themes are a concept for labelling and tagging backlog  
They are not time-oriented

Themes are focused on relative resource allocation (i.e.  
how much are we spending on theme “X” vs. theme “Y”)

A story can be assigned to exactly one theme

If the stories in an epic are assigned multiple themes, then  
that epic and any parent initiative is assigned those same  
themes

initiatives contain the resources to make themes happen

# THEMES ESTIMATIONS

The following are the parameter to evaluate themes:

- **Target** –Targets are a reference for the comparison estimates vs. actual values
- **Estimate** –The Sum of the total estimate for all backlog items labelled with a particular theme, and calculation of the percentage relative to the total estimate of all backlog items
- **Actual** -The allocation of actual work done