Agile Portfolio Management

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• [www.incrementor.com](http://www.incrementor.com)
• Author of *Agile Portfolio Management* (Microsoft Press 2008).
• APLN-NYC, PMP®, RUP®, Scrum Master, Agile Alliance, Agile 2008, New York University (NYU).
• Authorized IBM training provider and business partner (incl. RUP, RMC, project management).
Agile Definition

• Adaptive
• Empirical
• Iterative
• Incremental
• Team-managed
• Leadership vs. management
• Customer involvement
Agile Pyramid

- Corporate Strategy
- Agile Portfolio Management
- Agile Project Management
- Agile Software Engineering
Challenges with Traditional Project Management in an Agile Project.

• Work- Breakdown Structure (WBS)
• Gantt-Charts
• Critical Path Analysis
• Project Reporting
• Team Hierarchy and Structure
• Innovation and Improvement
• Requirements Management
Challenge: Gantt
Metrics

- Total # of open defects.
- Ratio (test cases and defects)
- Test Coverage
- # of Unit Tests
- Time to resolve Defect.
- ...

Morale Barometer

Morale

Quality

Progress

Velocity
# Project Reporting Example I

<table>
<thead>
<tr>
<th></th>
<th>Velocity</th>
<th>Quality</th>
<th>Morale</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>12 (14)</td>
<td>27</td>
<td>8.3</td>
</tr>
<tr>
<td>2</td>
<td>14 (16)</td>
<td>54</td>
<td>7.5</td>
</tr>
<tr>
<td>3</td>
<td>16 (18)</td>
<td>83</td>
<td>6.8</td>
</tr>
<tr>
<td>4</td>
<td>18 (16)</td>
<td>121</td>
<td>5.7</td>
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</table>
## Project Reporting Example II

<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>12 (11)</td>
<td>15</td>
<td>7.3</td>
</tr>
<tr>
<td>2</td>
<td>12(12)</td>
<td>12</td>
<td>7.5</td>
</tr>
<tr>
<td>3</td>
<td>12(13)</td>
<td>18</td>
<td>7.8</td>
</tr>
<tr>
<td>4</td>
<td>12(10)</td>
<td>8</td>
<td>8.1</td>
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Project Reporting Example III

<table>
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<th>Velocity</th>
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<th>Morale</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>8 (11)</td>
<td>97.4%</td>
<td>8.2</td>
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<tr>
<td>2</td>
<td>8 (10)</td>
<td>98.1%</td>
<td>8.5</td>
</tr>
<tr>
<td>3</td>
<td>8(12)</td>
<td>97.3%</td>
<td>7.9</td>
</tr>
<tr>
<td>4</td>
<td>10(10)</td>
<td>97.5</td>
<td>8.1</td>
</tr>
</tbody>
</table>
Return of Investment
Frequent Releases

Investment = 1 M
Feature 1 = 100K/month
Feature 2 = 250K/month
Feature 3 = 200K/month

1st Release
Feature 2
Feature 3

Iteration 5

2nd Release
Feature 1

Iteration 1
Iteration 2
Iteration 3
Iteration 4
Iteration 5

450K 450K 550K

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Return of Investment – Business Cases

Business Case A
2 Iterations
50K/ Team of 4
User Interface

Business Case A: Kill

Iteration 5

Business Case B: Go

Iteration 4

Iteration 3

Iteration 2

Iteration 1

Business Case B
4 Iterations
150K/ Team of 5
Technical Feasibility
Risk-Reward

- **Potential Stars**
  - Great Chance of success
  - High returns

- **Cash-Cow**
  - High Chance of success
  - Low returns

- **Speculative**
  - Low Chance of success
  - High returns

- **Killer**
  - Low Chance of success
  - Low returns
Final thoughts

• Agile metrics and reporting
• Go/Kill and Pause.
• Business Cases
• Driving innovation
• Return of Investment
• Outlook: Resource and Asset Portfolio.
What’s Up RUP?

Jochen(Joe)Krebs
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The Power of Franchises
Manuals

Few Steps, little Reading, Pictures

More detailed
Challenges with Verbal Communication
Challenges with Written Communication
Rational Unified Process

• Descriptive
• Prescriptive
• HTML Media
• Hyperlinked Knowledgebase
• Infrastructure
• Large Amount of Content
RUP is like a Buffet
Goals

• Short(er) Process Development Cycles
• Instant Modification
• Quick Delivery
• Re-use of process elements
• Customize existing processes
• Create new processes
• Easily main tenable process content corporate-wide
IBM Rational Method Composer

- Utilizes the UMA Architecture
- Eclipse Based Product
- Manages one process library
- Plug-ins to separate method content
- Browsing (testing) perspective
- Authoring Perspective
- Configuration as Deliverable
- Wizard-driven publication
- Export of tasks to Microsoft Project
- Visual process engineering using activities, milestones etc.
Unified Method Architecture

Content

Guidance

Process
Unified Method Architecture

- Work-Product
- Capability Pattern
- Role
- Delivery Process
- Task
- Activity

Guidance

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Guidance Elements

- Checklist
- Concept
- Estimation Consideration
- Example
- Guideline
- Practice
- Report

- Roadmap
- Supporting Material
- Template
- Term Definition
- Tool Mentor
- Whitepaper
- Reusable Asset
EPF and OpenUP

- Eclipse Project
- Open-Source Process
- Sponsored by IBM
  - Donated partial content from RUP for small projects.
  - Assigning contributors and team members
- Telelogic, Number Six, IBM, University of British Columbia, Xansa, Armstrong Process Group, Whatever Consulting, Ivar Jacobson International and others.
The OpenUP “Hump Diagram”
EPF Composer

• Similar to RMC
• Release 1.2
• Download at: http://www.eclipse.org/epf
• Wiki-Integration
• Publication of custom categories
Certification

[Image of a California driver's license labeled "Person"]

[Image of a Minnesota license plate labeled "Vehicle"]

[Image of a busy street scene labeled "Vehicle"]

[Image of a police officer labeled "Person"]

Incrementor
New RUP Certification

• Title: IBM Certified Solution Designer – IBM Rational Unified Process v7.0
• IBM examination identifier: “839”
• Focus on:
  – Rational Unified Process - Phases and Disciplines
  – Rational Unified Process - Diagrams
  – UMA (Content, Process, Guidance)
  – Key Principles of Business-Driven Development
• 52 (39 to pass) Questions, 75 minutes
• RUP-Blog: http://www.jochenkrebs.com
Thank You!

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