Agile Portfolio Management

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- Jochen (Joe) Krebs
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- Author of *Agile Portfolio Management* (Microsoft Press 2008).
- Co-author of *IBM Rational Unified Process Reference and Certification Guide* (IBM Press 2007).
- 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).
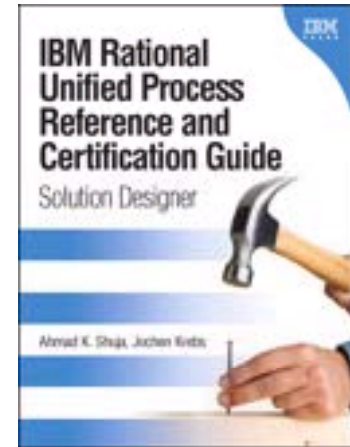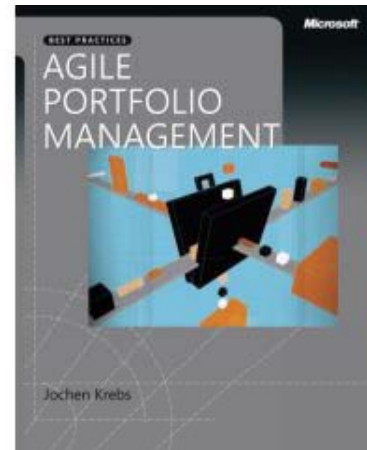
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Agile Definition

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

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Agile Pyramid

Corporate Strategy

Agile Portfolio Management
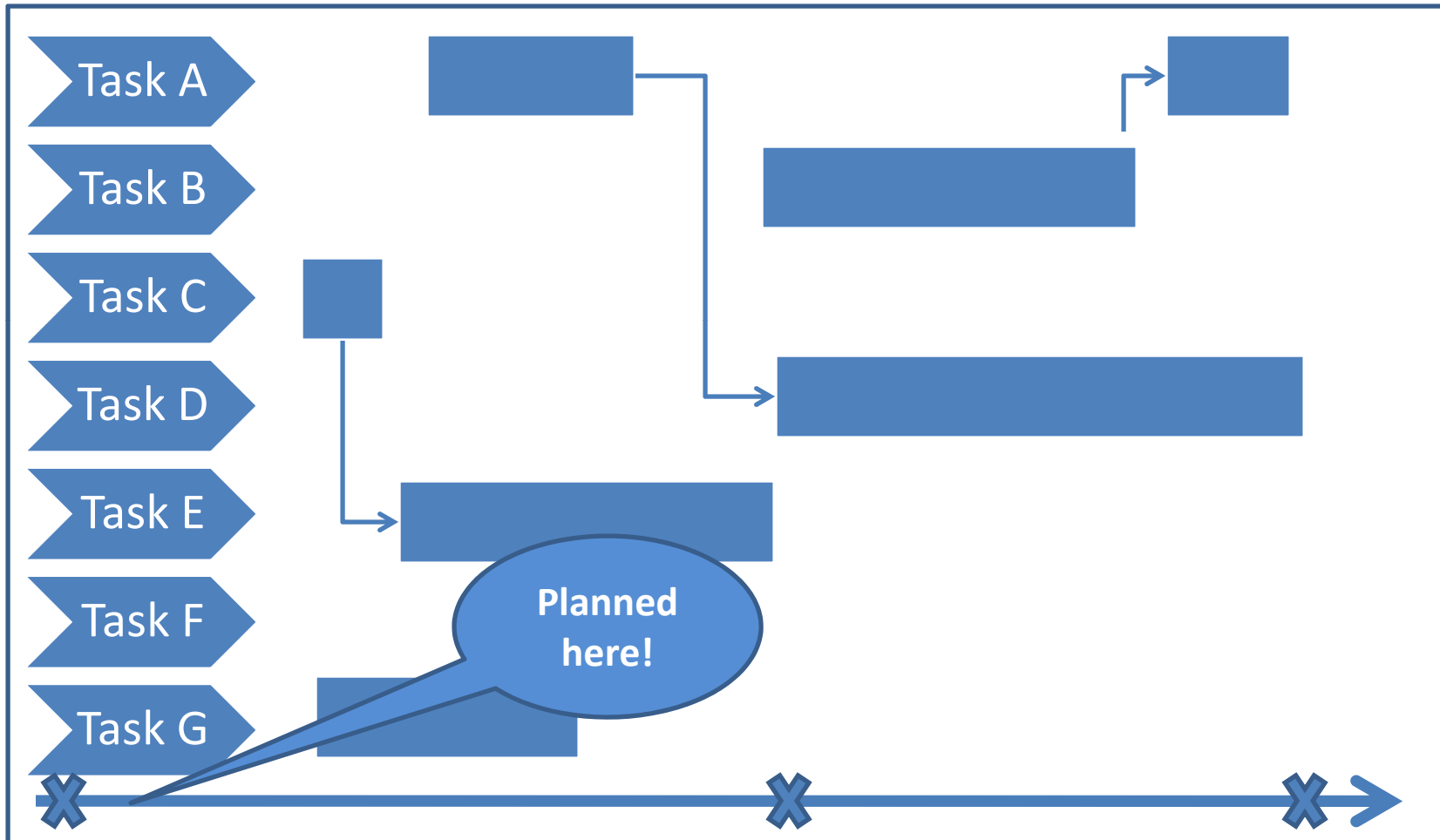
Agile Project Management
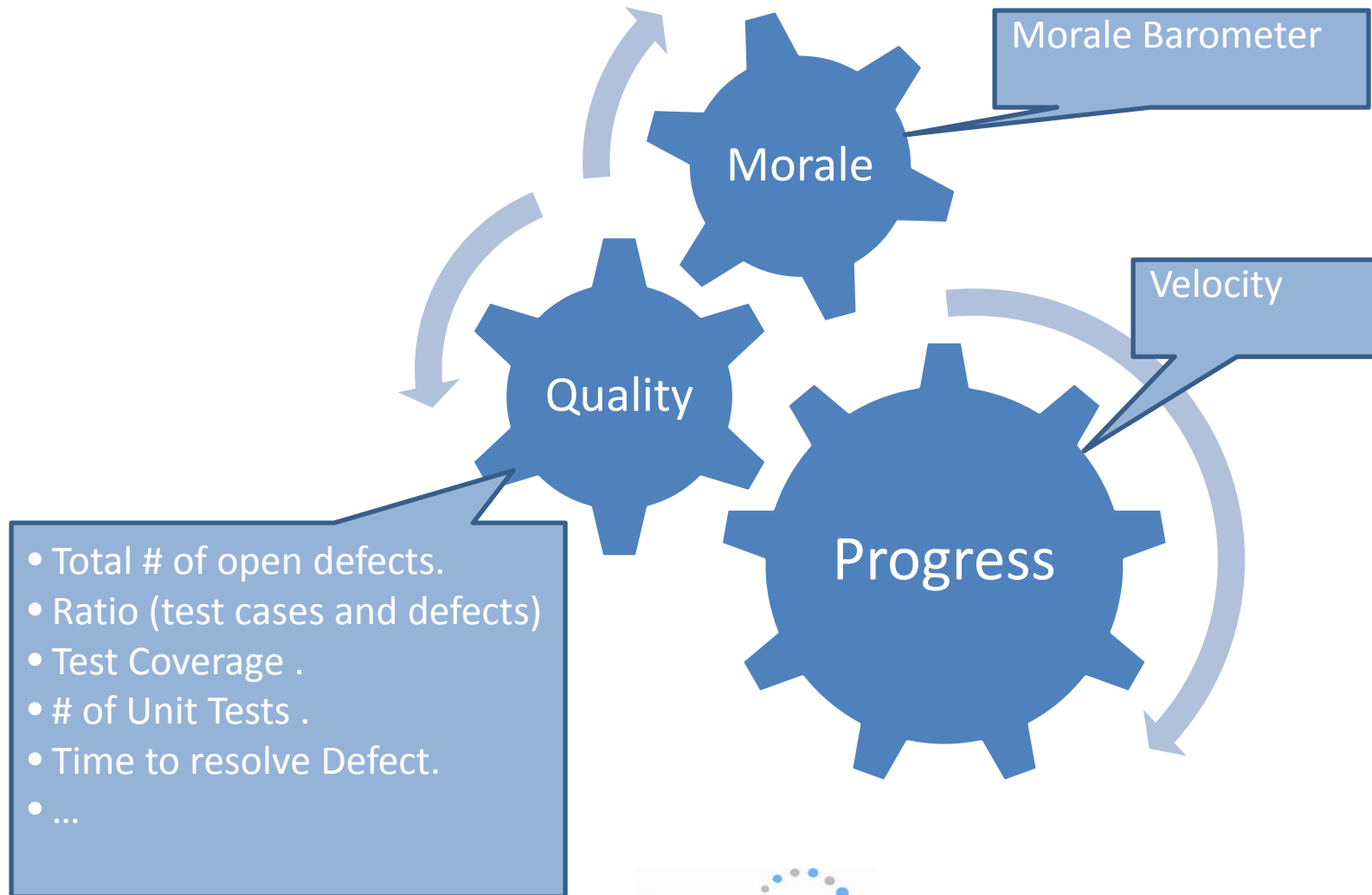
Agile Software Engineering

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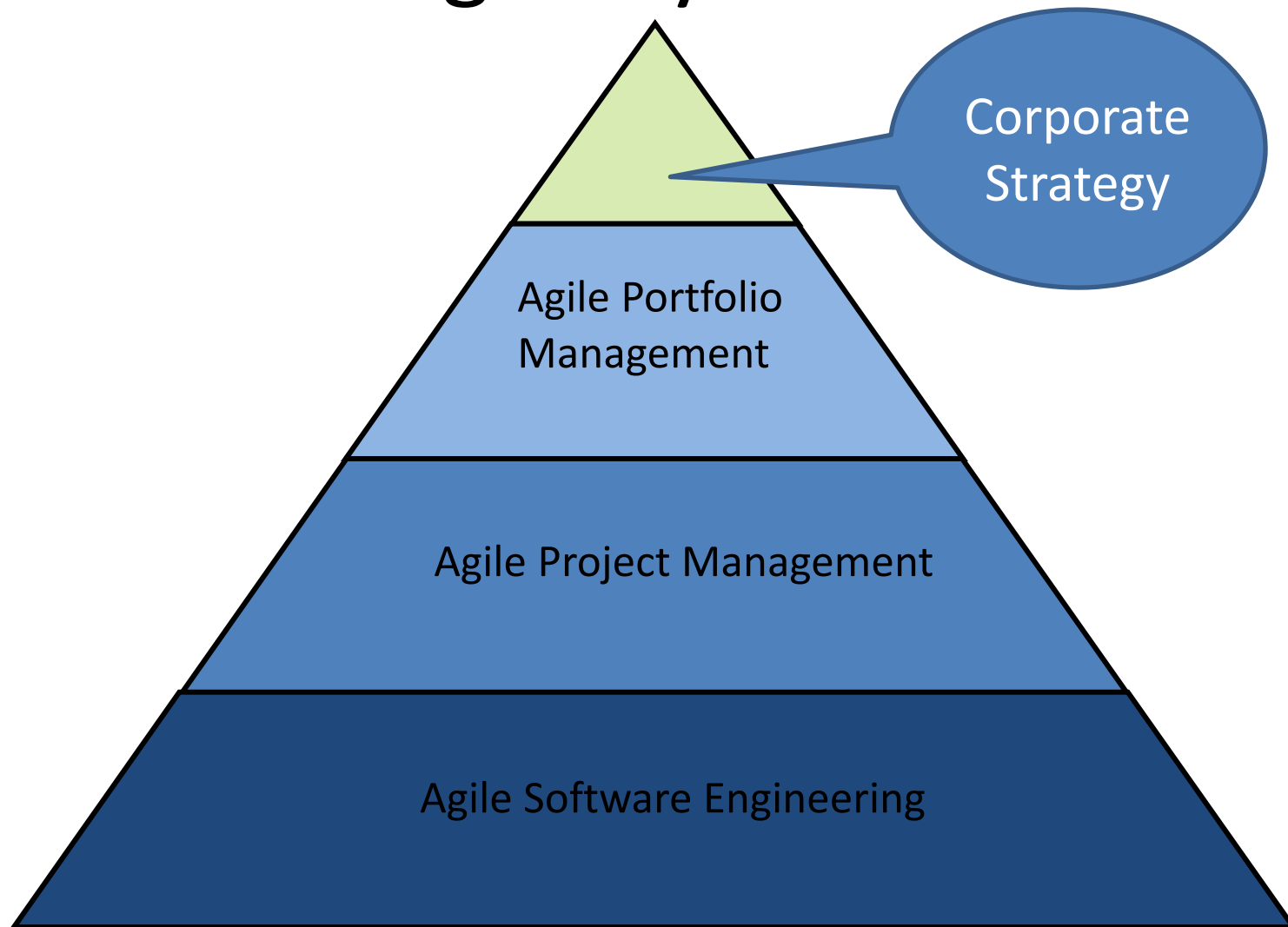
Challenges with Traditional Project Management in an Agile Project.

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

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Challenge: Gantt

Metrics

Morale Barometer

Morale

Velocity

Quality

Progress

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

Project Reporting Example I

	Velocity	Quality	Morale
1	12 (14)	27	8.3
2	14(16)	54	7.5
3	16(18)	83	6.8
4	18(16)	121	5.7

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Project Reporting Example II

	Velocity	Quality	Morale
1	12 (11)	15	7.3
2	12(12)	12	7.5
3	12(13)	18	7.8
4	12(10)	8	8.1

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Project Reporting Example III

	Velocity	Quality	Morale
1	8 (11)	97.4%	8.2
2	8 (10)	98.1%	8.5
3	8(12)	97.3%	7.9
4	10(10)	97.5	8.1

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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

Iteration 4

Iteration 3

2nd
Release
Feature 1

Iteration 2

Iteration 1

450K 450K 550K

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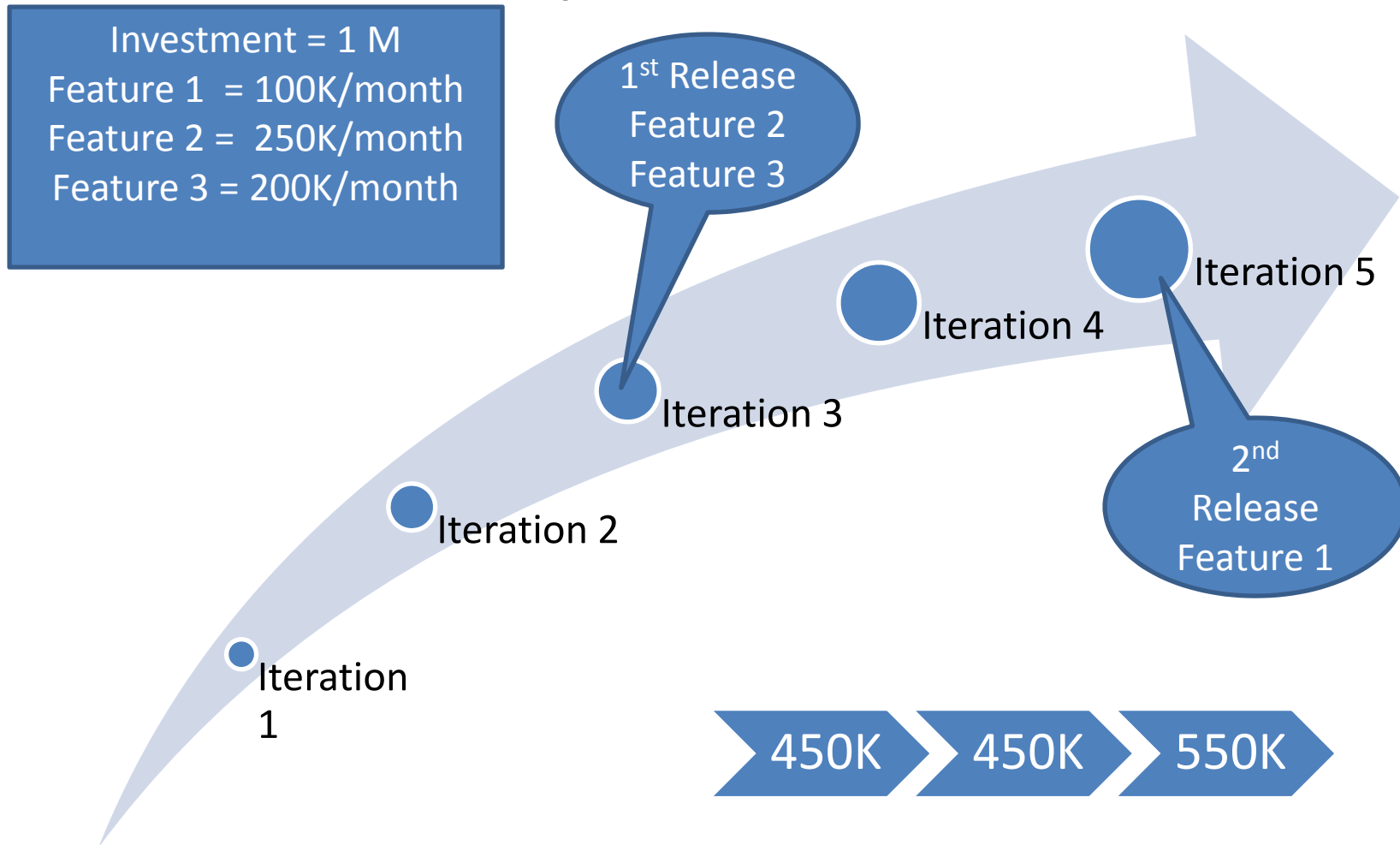
Return of Investment – Business Cases

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

Business Case A: **Kill**

Business Case B: **Go**

Iteration 1

Iteration 2

Iteration 3

Iteration 4

Iteration 5

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

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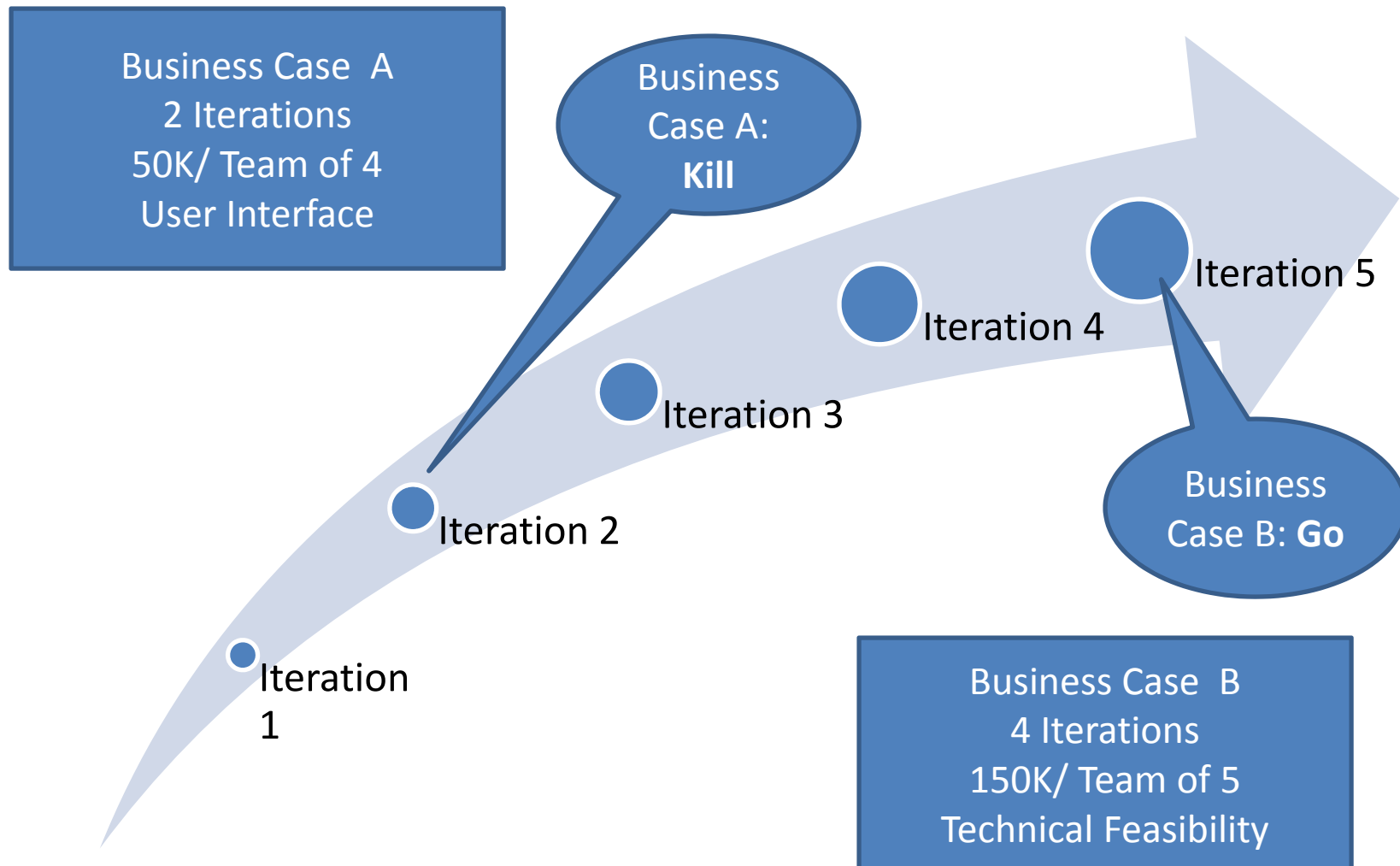
Project Selection Process

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.
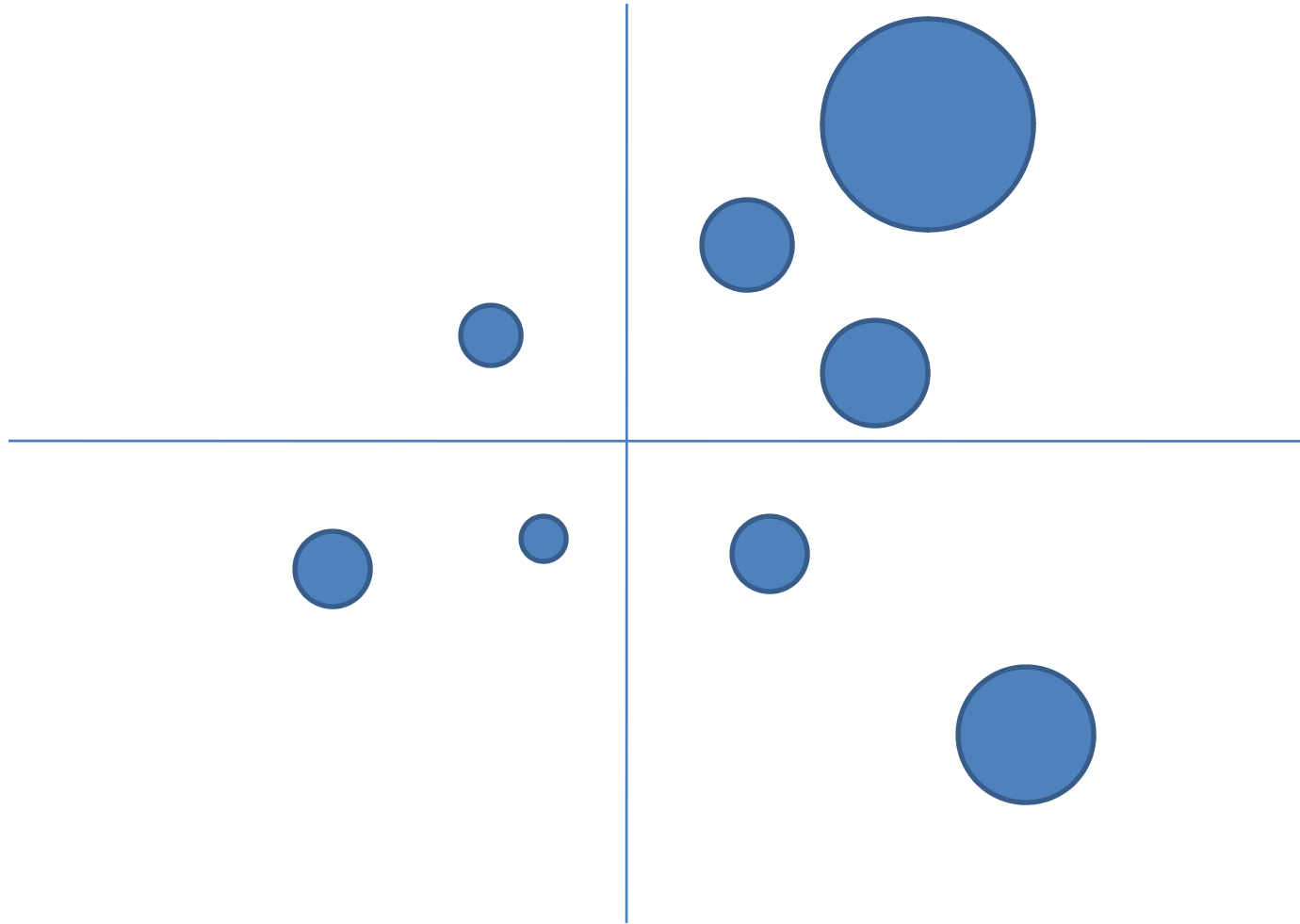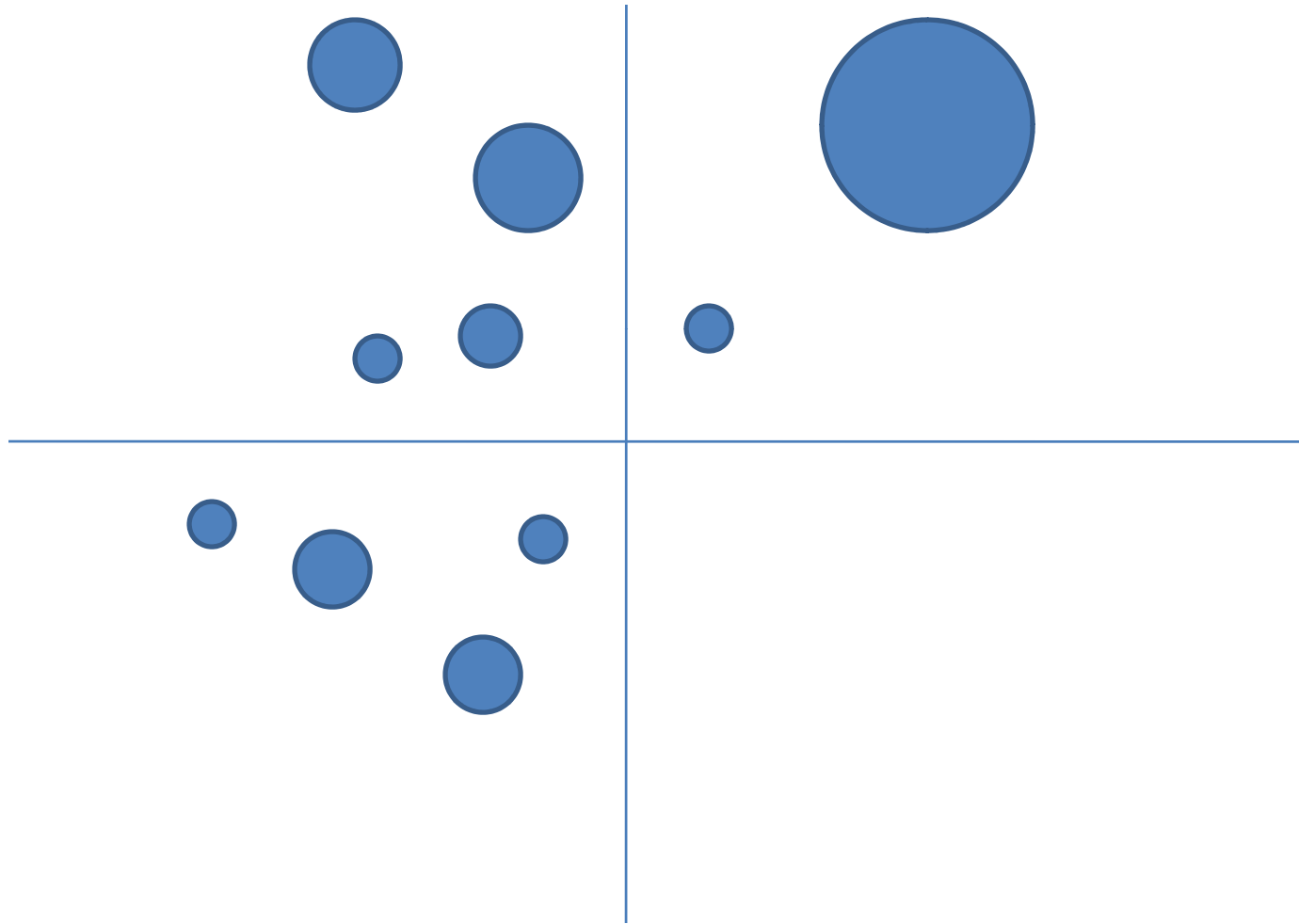Low returns
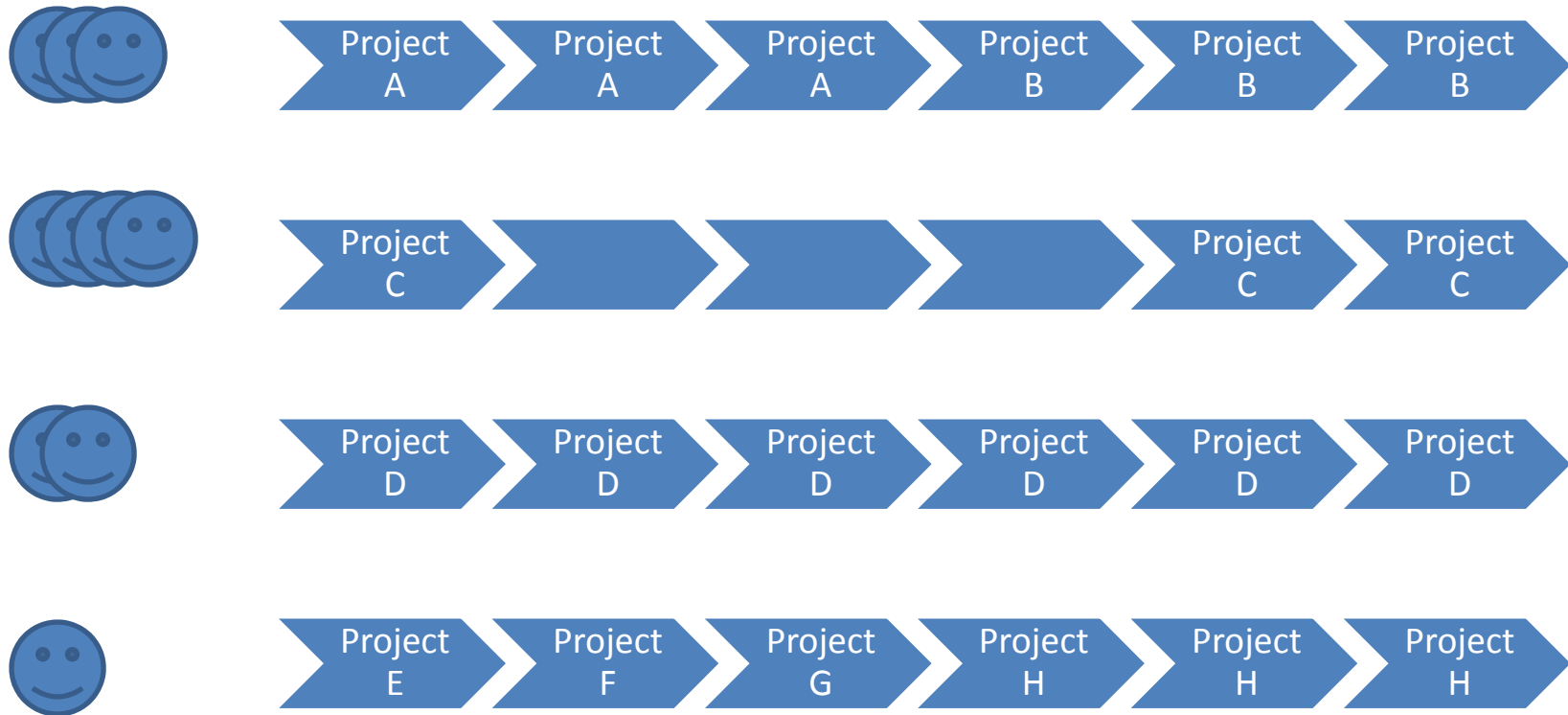
Cockpit I

Cockpit II

Final thoughts

- Agile metrics and reporting
- Go/Kill and Pause.
- Business Cases
- Driving innovation
- Return of Investment
- Outlook: Resource and Asset Portfolio.

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What's Up RUP?

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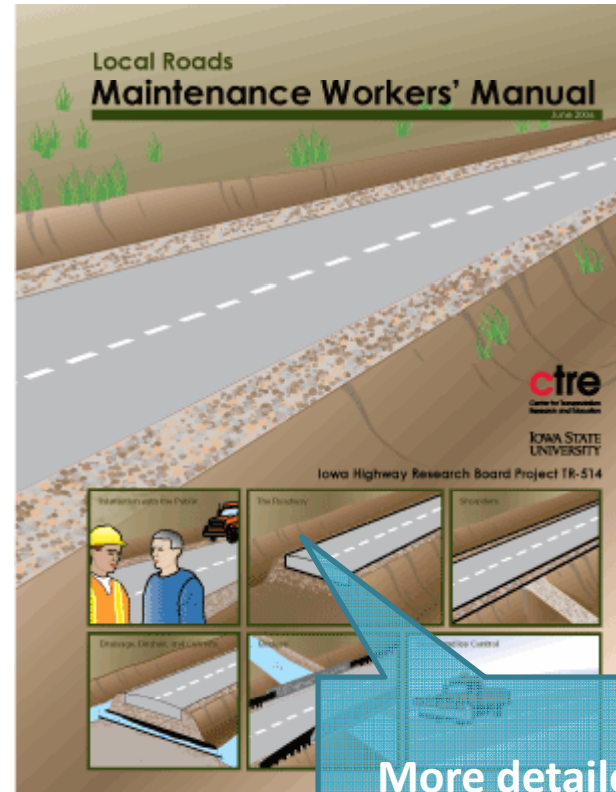
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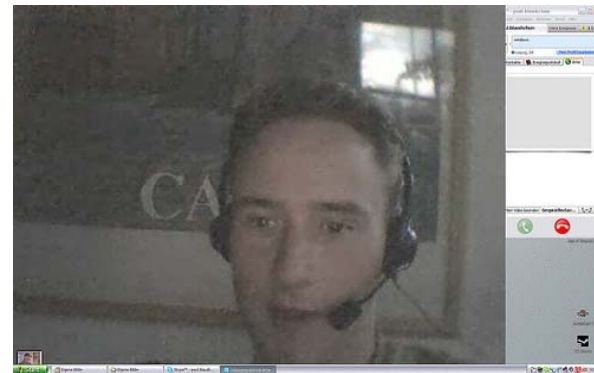# The Power of Franchises

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
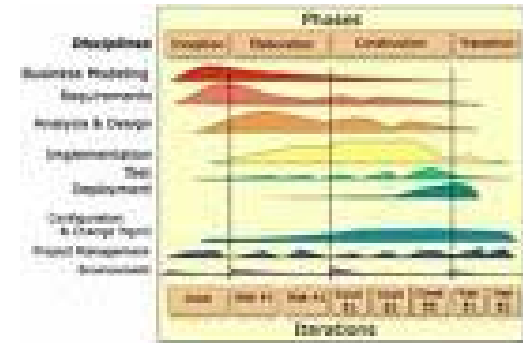- Large Amount of Content

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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

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Process Library

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.

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Unified Method Architecture
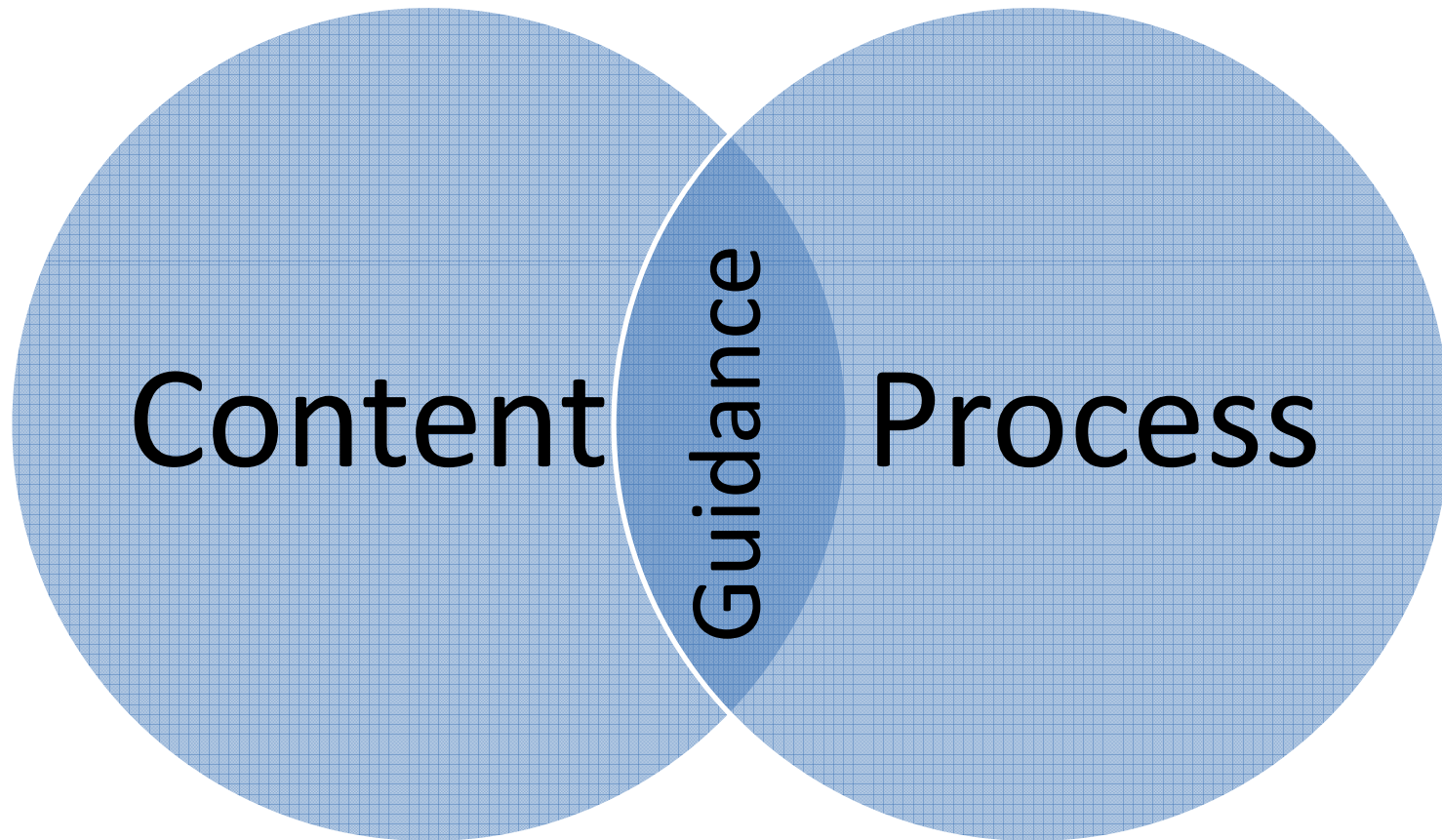
# Unified Method Architecture
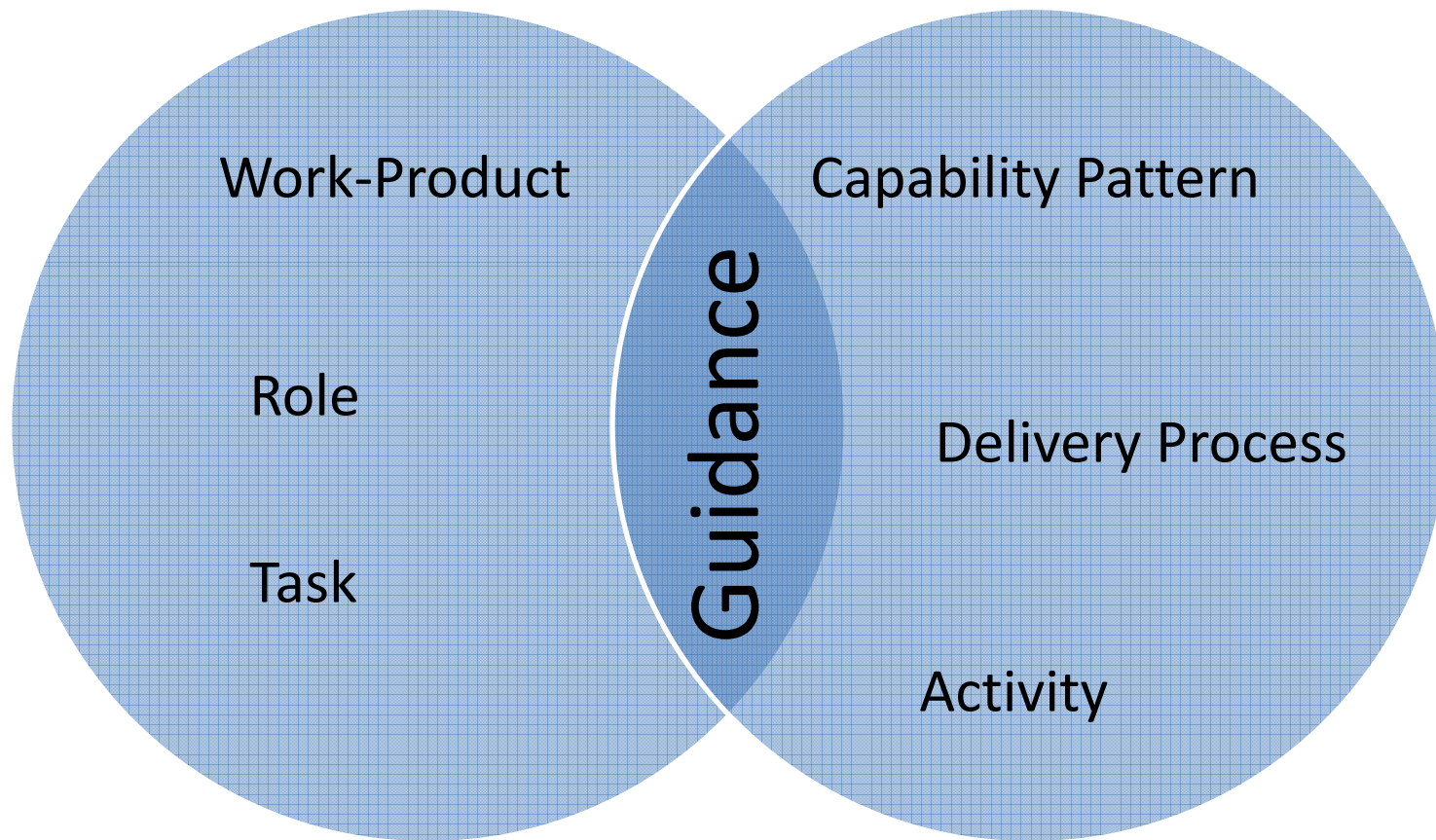
Guidance Elements

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

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

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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.

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The OpenUP "Hump Diagram"
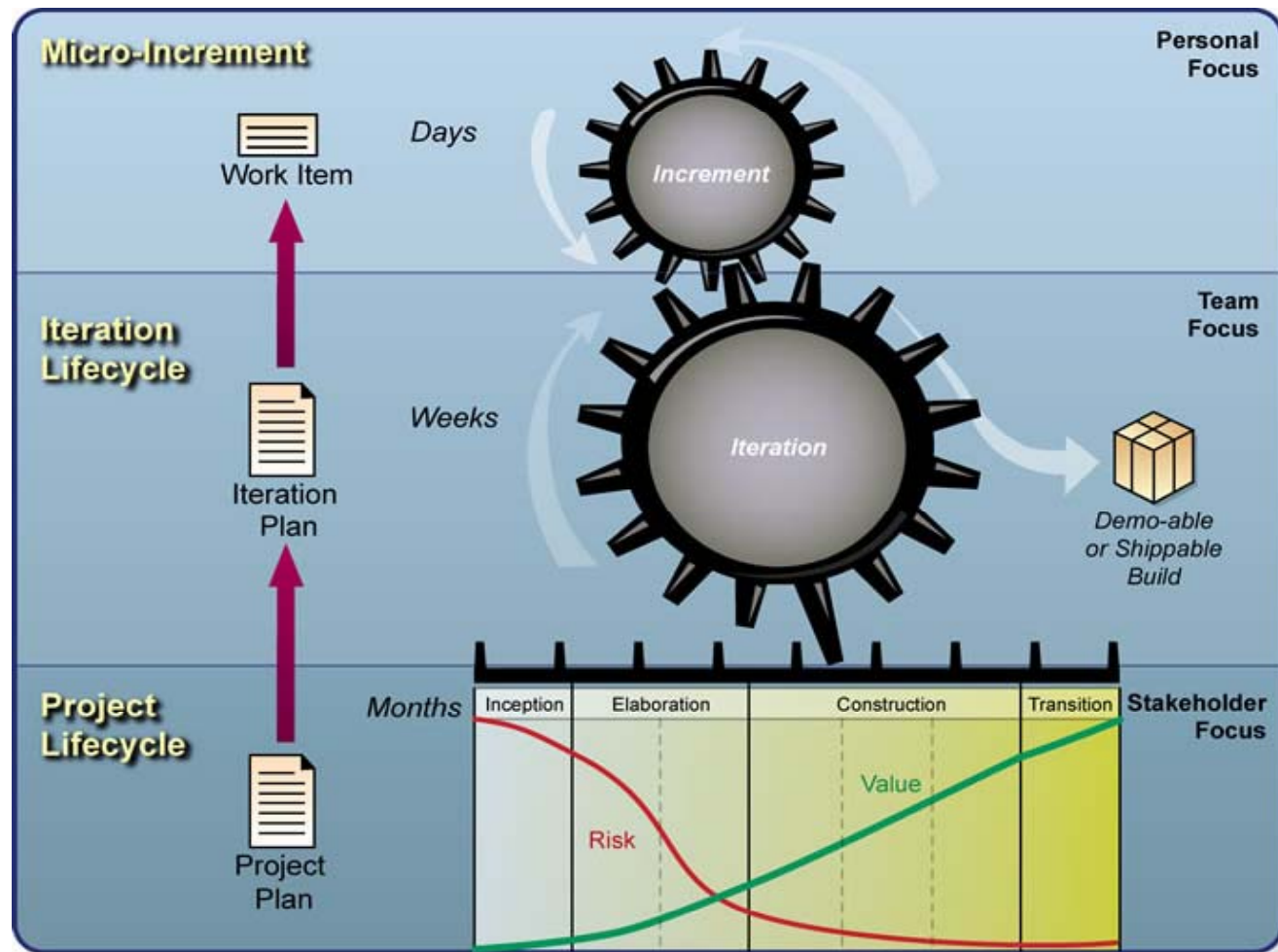
EPF Composer

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

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Certification

Person

Vehicle

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

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Thank You!

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