

Agile Project Management
By Gary Chin, published by AMACOM, NY, 2004
(A book review by R. Max Wideman)

Introduction

To be quite frank, the "agile" approach to managing software development projects does not appeal to us on project management grounds. But then we lack the experience of Gary Chin who, in this book, makes a good case for the "agile" approach in certain circumstances. Those circumstances are reflected in his book's subtitle "How to succeed in the Face of Changing Project Requirements".

As Gary has pointed out to us:

"[In today's] dynamic technology-driven environments, where customers often don't know, can't articulate, and/or are confused about requirements then, from the project manager's perspective, the requirements always appear to be changing. Traditional scope, cost, schedule control that works well in more mature environments will be ineffective in these cases and therefore, 'agile' is something to consider. "¹

In other words, if the client is not prepared to become reasonably knowledgeable of what they want, then they must be prepared to pay for exploration. In fairness, you cannot "see" software, you can only see the interface that connects you to it. That means a 'voyage of discovery' that does not readily support traditional scope and cost control.

How many clients are there out there like that? Well, it seems that in the struggle to always be on the cutting edge, quite a few. As Gary explains:

"In a fast-paced business environment filled with uncertainty and change, project management can feel more like running an obstacle course. You and your team are constantly running into internal and external factors that force you to change direction – in a hurry. But acting quickly to keep projects aligned with shifting business priorities doesn't mean acting hastily. What your PM team and processes need is *agility*."²

The flysheet on the cover of Gary's book goes further by stressing:

"As the pace of business accelerates and competition becomes fiercer than ever, project requirements can change in the blink of an eye. Traditional project management methods that once worked in predictable, mechanized installations are much less reliable in today's technology driven and financially unstable environments. Revised product specs, slashed budgets, and compressed delivery schedules all conspire to throw off even seasoned project managers. Your project team needs to be able to keep pace, and the key is agility: the ability to move quickly and dramatically to get around any and all obstacles."³

According to Gary: "Agile Project Management presents a practical and repeatable methodology for building a sound yet flexible project process."⁴ Sound? Slashing budgets and compressing delivery schedules hardly seems consistent with revising product specs, but if the methodology is practical, repeatable and flexible, we'll let that pass for now. It seems that what we have is a management problem, not a project management problem.

Still, if that is the prevailing culture, this book will explain how to deal with it.

Book Structure

The Preface explains that:

"The need for agility is magnified in highly innovative businesses that are pushing the limits of current technology and thinking, and where key parts of projects often involve discovery or problem solving never encountered before . . . [In problem-solving projects,] project management is more often than not perceived as a bureaucratic overhead that will probably slow down the team rather than make it more agile . . . [Yet] most companies recognize that effective and *agile* project management is essential for their survival. The problem is getting there! . . . It is in these situations where we will explore various new thinking that will supplement the current body of knowledge on project management . . ."

Accordingly, *Agile Project Management* contains twelve chapters and four appendices logically organized as follows:

1. Defining Agile Project Management
 2. Determining When to Use Agile Project Management
 3. Projects Are the Business
 4. The Cross-Functional Team: Organizing for Agility
 5. The Project Manager's Role
 6. The Agile Team
 7. Planning for Agility
 8. Approaching Risk in an Agile Environment
 9. Management: Creating an Environment of Agility
 10. The Operational Project Management Infrastructure
 11. Agile Portfolio Management: Aligning Tactical Projects with Business Strategy
 12. Integrating Portfolio and Project Management with the Product Development Process for Business Success
- Conclusion

Appendix A: Project Status Reporting Process

Appendix B: Issue Tracking Process

Appendix C: Action Item Tracking Process

Appendix D: Portfolio Prioritization Process

As a common thread throughout the book, Gary uses the diagram shown in Figure 1 to illustrate key differences between agile project management and classic project management.

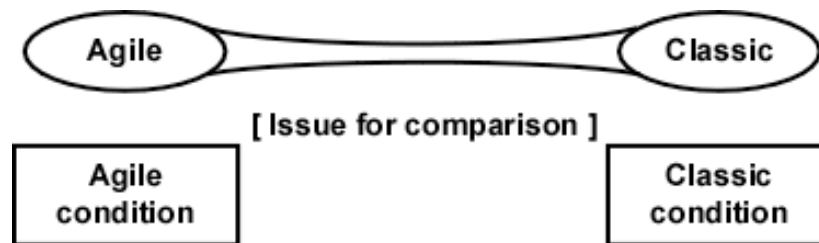


Figure 1: Comparison of agile with classic PM

Through the chapters, key points are emphasized by sidebars titled "Agile Strategy". These points are

presented as tips or action items for the agile project manager. At the end of each chapter there is a brief summary of key points in bullet form. In addition, several chapters end with a section on "Workflow" or similar template instructions. In addition, the four appendices listed above provide valuable detailed descriptions and explanations of the processes named.

What we liked – Part 1

In the book's Preface we noted the observations that:

"[Problem-solving] types of projects have an inherent uncertainty and involve multiple paths, decision points, and iterations before they can be successfully completed. Technical teams know that it is impossible to precisely plan new discoveries far in advance. Consequently, they only use project management for administrative support, if at all. Their resistance to project management is, in fact, often valid. The classical project management technique that they have experienced is cumbersome and not as effective in a fast-paced and uncertain environment. While I don't fully agree with this viewpoint, I see many of the commonly known PM practices and tools are geared towards large and relatively slow-moving projects."⁶

Exactly so! This description aptly describes the software development environment. The essential features of this environment are that we are dealing with "advanced technology" and intellectual workers who have to use their creative minds. The obvious implication is that we do have to use a different management approach. That is the very reason why we need to recognize different types of project. That is, some classification scheme along the lines we have suggested in our very first Issacon #1001 (<http://www.maxwideman.com/issacons/iac1001/sld001.htm>) where we have identified this sort of project as ***Project Type 4: Intangible & Intellect.***

As Gary says:

"Those of you who have managed projects in a technology environment know that balancing the needs of the project management (PM) process against those of a creative technical team is something of an art. You risk stifling innovation with too much process. With too little process, you risk never getting the project completed. This mismatch occurs when you try to employ classic PM methods in an agile environment."⁷

And he adds:

"Agile PM will provide some new concepts and techniques that I've seen to be effective in dynamic environments and that, hopefully, will help you to advance your project management foundation in these challenging areas."⁸

According to Gary, the unique features of the Agile PM Environment consists of Uncertainty; plus Unique Expertise; plus Speed; where Uncertainty, both internal and external to the project, is the primary factor making the case for agile PM.

Because of this uncertainty, Gary recommends two Agile Strategies:⁹

1. Have your project managers take more of an outward-facing perspective from their project, to facilitate the integration of the project and the business
2. Focus your project manager's energy on delivering results that solve business needs rather than staying within preset project boundaries

For the "Agile" environment described, this is good advice because, as he says: "In an uncertain environment, the original project boundaries will quickly diverge from business reality."¹⁰

What we liked – Part 2

Gary discusses the pros and cons of the matrix organizational environment and suggests that the contrasting project-driven organization is better suited to agile project management for the following reasons:¹¹

- Business and project decision-making are better integrated than in the matrix
- The sole goal of project teams is to achieve the business objectives
- The multiple, separate, and often conflicting objectives of the matrix organization don't exist
- The silo mentality that so often inhibits project progress, especially when it involves changing requirements, is eliminated, and
- Your unique and key players can be put in place to guide your most important projects, the ones defining your business, without encountering obstacles from competing functional management

Well said and businesses involved in software development should take heed. But considering that most organizations do operate in a matrix environment for the efficiencies that they think it brings, this narrows the field considerably. However, in a subsequent chapter, Gary recognizes this fact by observing that "Most companies running projects today are set up as some variation of the matrix" and he explores the dynamics that support agility.¹² In this Chapter 4, Gary offers sixteen Agile Strategies to deal with various situations identified, and a Communications Plan Workflow together with a practical template that is available on line.

At the end of Chapter 7 is a section titled "Project Data Sheet Workflow". This twelve-page document describes in some detail a "Project Data Sheet" to be used when initiating a new project. This is a very useful reference document and reads to us very much like a project charter or project brief that one would use as the management-approved plan for a project's execution phases.

In Chapter 8, Gary discusses risk management in the agile environment. Through it, he makes a number of interesting points, for example:¹³

- "Risks" are forward looking, i.e. something that may happen in the future, while "Issues" have happened or are happening in real time. A risk may, and often does, turn into an issue and project managers should strive not to let this happen.
- Risk events involve extra work whichever way you look at it. Obviously, you can reduce the amount of that work by identifying and planning for those risk events before the situation gets out of hand.
- You can take care of possible risk events either by adopting a mitigation strategy or by adopting a contingency plan. That's assuming that you've ruled out the possibility of total avoidance in the first place.
- The difference between "mitigation" and "contingency" is that with mitigation you do extra work anyway, while with contingency, you do extra work only if needed.

Downside – Part 1

Although described at length in the book, Agile Project Management is not specifically defined. However, we may conclude that it is a conceptual project management framework for undertaking software development projects in which the "emphasis is moved from *planning* to *execution*."¹⁴ That should satisfy the brigade of people who are inclined towards: "Never mind all that **planning** stuff. Just let's get on with the **work!**" But as Gary says: "Agile project management concepts are not for every

project, yet they can be invaluable to others."¹⁵

Gary identifies two criteria for Agile PM. The first: The project environment, of which he recognizes three different types, namely "operational"; "product/process development"; and "technology development".¹⁶ The operational project environment is low uncertainty and therefore "Classic" and more process oriented, while the other two are highly uncertain and most suited to agile PM. His second criterion is Organizational Stakeholders in which agile PM concepts have the best chance of success when the project operates under, more or less, a single organizational umbrella.¹⁷

Gary's use of the term "operational" is a little confusing because it is usually used to distinguish between on-going business operations and projects. However, in Gary's environment, the business is made up of projects. As he says: "After all, if your projects are your business and your key players are the heart and soul of your project, then it stands to reason that your key players are your business."¹⁸ Indeed, he makes this case for Agile Strategy: "View your projects in the same perspective as your business, by integrating project and business decision-making processes, and you will better achieve your business objectives."¹⁹ While the last is obviously good advice, we think the description is a little exaggerated for most companies.

On the subject of excessive project management paper work, Gary writes:

"[I]n the uncertain environment of agile PM, we would be naïve if we did not expect changes to the project plan on several occasions, certainly much more than in a mature project environment. . . . If the project manager maintains an inward-facing perspective and subscribes to the notion that project performance is based on the team's ability to deliver what they signed up for (i.e., the original plan), then he will spend a good portion of his time analyzing and documenting these variations from the original plan. As the zigs start to mount where the plan called for a zag, the project manager will soon be consumed with tracking, analyzing, and documenting ever more complex variations. When this happens, the project manager reduces himself to what is essentially an administrative support role. . . . [A]s project manager you need to keep your eye on accomplishing your project objective – not on excessive paperwork."²⁰

In that last line, we think that what Gary really means is **product** (objective) and not **project**, otherwise, well said. In fact we've experienced managements that believe that project managers, even project directors, are really no more than "administrative followers". This inevitably means that someone else is really in charge of the **product** development. This confusion of terms confirms our belief that it is time to start distinguishing between **project management** and **technology management**.

Later Gary provides an "Agile Strategy" that says:

"Track trends of key external influencers, as well as variances from what is expected, and you will move from being reactive to proactive." And "By monitoring [these] trends, the project manager and team are better able to make the decisions that will keep their project aligned with the true business needs."²¹

And in opening Chapter 9 on "Creating an Environment of Agility", he says:

"Agile project management is about deftly managing the change in requirements associated with project uncertainty, so it becomes a positive force for both the project and the business, rather than a negative one. The project manager guides the team through the changes necessary to bring the project to a successful completion."²²

That all sounds like good advice and may be true, but what is the meaning of "success" in this context? Is it on-time-within-budget or a wonderful-product-regardless? Is it really the job of the project manager to change the course of the project? Surely it is his or her job to determine the manner of accomplishment and not the destination? That sounds to us like a weak sponsoring management incapable of doing its homework and providing direction!

Indeed, Gary seems to confirm this confusion by observing:

"In the classic project management environment, upper management has minimal involvement with course changes within a project. Their primary project roles include endorsing/sponsoring the project, committing resources, setting a project deadline, receiving status reports, managing escalations, and providing rewards to motivate the team."²³

If the "course change" is concerned with the route and timing of how to get there, this is quite true, but if the course change changes the destination (i.e. a "product scope change") then that is a very different matter.

Downside – Part 2

In his standardized graphic, Gary illustrates upper management's role as shown in Figure 2.

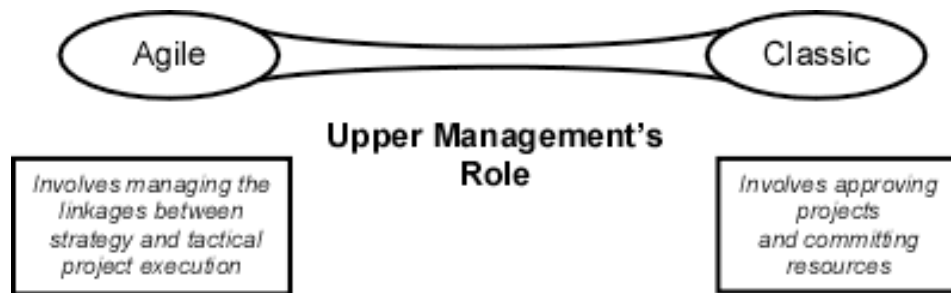


Figure 2: Upper management's role in the agile versus classic project²⁴

In our view, the responsibilities of upper management involve a healthy dose of both the classic and agile roles described in the boxes above – and in equal quantities!

In a similar diagram, Gary opines that under Agile, organizational adaptability is critical for an organization to be able to reinvent itself around *the* project.²⁵ (Emphasis added) Project? Which project? Most organizations in a technology-driven environment have many projects in a portfolio, so does that mean that the organization is busy reinventing itself around multiple projects? Gary goes even further, for he says:

"An annual review of the portfolio is no longer adequate. You must be prepared to reprioritize projects, as needed, whenever events cause selection criteria to change value, or criteria weighting to change, or new criteria to be introduced."²⁶

And he concludes that:

"Agility is all about making the right decisions during project execution (as well as planning); agile PM is about creating the environment and tools to support those decisions."²⁷

Our inference here is that the real requirements will be determined by a series of "right decisions during

project execution", and that therefore an earlier determination, along with a corresponding planning effort, is secondary. We conjured up a perhaps exaggerated image of an organization with projects in the execution phase bouncing all over the place and no clear idea of where any were going. That's a real scary situation and thoroughly demoralizing for dedicated project team members. If all of that should be true, then it is no wonder that there are so many project failures!

Albeit a "Classic" project management view, it is our contention that there are such things as project planning of scope and cost for which the project manager is responsible. And, just as important, both of these need controlling during execution. We didn't see these discussed anywhere in the book whereas in contrast, the whole of Chapter 7 is dedicated to time control under the heading "Planning for Agility".²⁸

Summary

This book is well-written, well set out and easy to follow. It tries hard to integrate project management into a difficult technological environment. So, if you are working in the information systems and product technology development fields where the understanding and conduct of project management is relatively less mature, then this book provides many valuable insights.

Indeed, the book is laced with some eighty "Agile Strategies", one of which probably gives the key to your success in the industry, namely:

"Act as an information manifold to efficiently distribute the distilled information to the appropriate team members. This highly valuable role provides a key linkage between the project and its external environment, and it puts you in front of both the project team and sponsors."²⁹

So, if what you want is visibility to move up the corporate ladder and build relationships, then this is the book for you. Without question, that personal strategy is very common in the corporate world, and not necessarily a bad thing. That is – find out what the (most important) people want – and give it to them. After all, what it costs will soon be buried in last year's corporate financial statement!

If, however, you are a traditionalist project manager that cares about project management as a discipline, this book does not sit so well. That's because the concept of "agility" in project management seems to be a wonderful way of evading the serious business of exercising thoughtful direction and control, especially where scope and cost are concerned. As Gary points out: "In the agile project, we spend more energy on information absorption and analysis, rather than constantly updating the plan."³⁰

But when all is said and done, management of technology (projects) *is* different from managing the "classic" project, and the project management style *does* need to be adjusted to suit. It's all a matter of degree.

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¹ By Email, 3/21/06

² *Agile Project Management* back cover fly sheet

³ *Ibid*, front cover fly sheet

- ⁴ Ibid.
- ⁵ Ibid, pp vii - x
- ⁶ Ibid, pp vii - viii
- ⁷ Ibid, p1
- ⁸ Ibid.
- ⁹ Ibid, p27
- ¹⁰ Ibid, p28
- ¹¹ Ibid, pp33-34
- ¹² Ibid, Chapter 4, p37
- ¹³ Ibid, pp123-139
- ¹⁴ Ibid, p3
- ¹⁵ Ibid, p13
- ¹⁶ Ibid, p14
- ¹⁷ Ibid, p17
- ¹⁸ Ibid, p35
- ¹⁹ Ibid, p25
- ²⁰ Ibid, pp66-67
- ²¹ Ibid, p70
- ²² Ibid, p141
- ²³ Ibid, p142
- ²⁴ Ibid, p143
- ²⁵ Ibid, p149
- ²⁶ Ibid, pp172-173
- ²⁷ Ibid, p203
- ²⁸ Ibid, pp98-110
- ²⁹ Ibid, p73
- ³⁰ Ibid, p77