

An Introduction to Agile Project Intake – Challenges, Learnings and Best Practices, for Agile Transformation – Parts 1 & 2

Published on June 30, 2018



[Gaurav Mehra MS-CSE, MBA, SAFe SPC, ICP-ACC, PMP, AWS-CCP](#)[Follow](#)

Enterprise Agility & Solutions Architecture. Project, Program, Portfolio, Client Management. Board of Directors.

This article was initially published with [ScrumAlliance.org](#) on Mar 27, 2015. Over its life it received a rating of over 4.75/5.

Are you part of a wonderful SCRUM team that sometimes hits road blocks for reasons that could have been discovered early on? Do you belong to a program or organization that is in transition from traditional development methods to Agile ones? Or is your organization starting the journey to develop agility? We have good news and some bad news for you! Good news first, most studies with data spanning over the past decade show that Agile development practices reduce the project failure rates and improve customer satisfaction. The bad news is that many Agile initiatives still fail. Most Agile practices are still challenged with overall project success rate when measured based on time, budget, and all planned features delivered.

There are many factors that play a part in the success or failure of any Agile initiative. We will present a series of articles to analyze the one factor that we deem most important, the intake of Agile projects. We found most Agile frameworks to be silent about the intake process. It is an empirical fact that upfront evaluation and planning is key to success of any project or larger initiative, and Agile development methods suggest no different. Thus, the implementation of adequate Agile Project Intake practices can dictate the success of a scrum team, program, and its ecosystem.

Some questions you may ask are: What is Agile Project Intake? How is it different from what we have traditionally done? Why should we do anything different for the intake of Agile projects? This article series tries to answer these questions and more. In this first article we introduce the concept of Agile Project Intake and touch on relevant challenges. In the subsequent articles we will discuss real world challenges using non-attributable examples,

suggest a framework, lessons learned, best practices, and conclude the series with a non-attributable case study.

What is Agile Project Intake?

Put simply, Agile Project Intake is a multi-stage process for reviewing and evaluating organizational needs that convert into projects, beginning with request submission to initiation, prioritization, and approval phases. The goal is to assess not only if the project will feasibly address the organizational need, but also what methodology is best suited to undertake the endeavor given the organizational environment, structure, availability of resources and time.

How is it different from what we have traditionally done?

In many ways Agile Project Intake is no different than the intake processes traditionally used by organizations, except that it aims to also assess, given the known facts at the time of evaluation, whether the proposed initiative is a better fit for Agile development than traditional Waterfall, or vice versa. The results may lead to either a choice of adequate execution methodology or, at the very least, make the management and delivery teams aware of threats and opportunities, allowing for efficacious Risk Management.

Why is Agile Project Intake important?

A clear understanding and execution of an Agile Project Intake process dictates the success of the projects, which is why it is important to us, and why we think it is important to you. Project Intake is an essential component in the overall delivery workflow and often the least visible.

Traditionally, in most medium to large organizations project intake tends to be primarily controlled by the middle-tier management, often with minimal information to and input from the implementers. In the spirit of Agile methods, the Agile Project Intake practices encourage an open and honest project evaluation by all parties, be it pigs or chickens. By increasing accountability, you can cultivate a workplace full of empowered and motivated individuals. Along with improved motivation, your organization will benefit from increased upfront time-boxed analysis, more realistic project estimates and forecasts, to include effort, duration and budget. This increased accuracy will in turn lead to better targeted communication and setting of expectations with customers and clients, leading to increased customer and client satisfaction. The ultimate goal for every business!

Given the likely behavioral response to positive reinforcement, positive outcomes will encourage teams to get closer to their optimal performance and thus more predictable and efficient project intake. - Yes, this could be the virtuous cycle you have been searching for!

We state that if the requisite time and focus is given to the intake of Agile projects instead of passing them off as a mere formality, then the organizations, programs, and teams will

experience better alignment and overall efficiencies. Only making an engineering team Agile does not make the program or organization Agile, this requires a change in organizational behavior. Introducing an Agility Assessment in the project intake process broadens these horizons across departments and layers.

Our next article will dive into some of the challenges of implementing and managing an Agile Project Intake process along with a framework to guide our discussion.

About the Authors

[Gaurav Mehra](#) and [Eric Aker](#) worked together as Technical Consultants to a Tier 1 telecommunications provider as Agile Subject Matter Experts. In their respective roles they were also responsible for introducing Agile software development practices to a long-standing Waterfall software application development program and guide that program towards Agile transformation. They together bring over 35 years of industry experience and almost two decades of Agile software development expertise.

What is Agile project intake? How is it different from what we have traditionally done? Why should we do anything different for the gatekeeping and intake of Agile projects in Agile or Hibred/ transitioning programs and portfolios? This article series tries to answer these questions and more. In this first article, we introduce the concept of Agile project intake and touch on relevant challenges. In subsequent articles we will discuss real-world challenges using non-attributable examples, suggest a framework, cite lessons learned, consider best practices, and conclude the series with a non-attributable case study. #Agile #Transformation #Project #Program #Portfolio #Intake #Scrum #Change

Source: <https://www.linkedin.com/pulse/agile-project-intake-challenges-learnings-best-practices-gaurav-mehra/?published=t>

An Introduction to Agile Project Intake - Challenges, learnings, and best practices, for Agile Transformation: Part 2 (Includes the Quick Assessment)

Published on July 1, 2018



[Gaurav Mehra MS-CSE, MBA, SAFe SPC, ICP-ACC, PMP, AWS-CCP](#)[Follow](#)

Enterprise Agility & Solutions Architecture. Project, Program, Portfolio, Client Management. Board of Directors.

This article was initially published with ScrumAlliance.org on Mar 2, 2016 and received over 4.75/5-star rating.

Greetings! If you are reading this article, then the chances are you spend part of your day in an environment that is in some state of Agility. If this is true, the probability is rather high that there are challenges and room for improvement! We bring you good news, we are here to help with one of the most fundamental issues that plagues Agile transformations. So read on!

For any of you who haven't read the first article of this series, in [**Introduction to Agile Project Intake - Part 1**](#), we touched on why we need a different approach for project intake analysis when Agile is not the only software development methodology available to choose from. By the end of this series, our hope is to give you a simple framework which will guide you through the project intake assessment in a mixed portfolio model.

Before we jump right into the framework, we have decided to provide you with some more context around the challenges of project intake models. The feedback we received from the first article was immensely insightful into how we decided to convey our complete message. It is important to share what we think are situations organizations can find themselves in when deciding to adopt Agile methodologies. Though our experiences will not cover every scenario, or every industry, we feel these examples were the most impactful to those around us while coaching and researching with Scrum teams.

In this second article, we will walk you through issues and challenges found in several organizational contexts and then present you with a "light-weight" intake assessment that you can introduce in your organization right away. Remember, an Agile framework is not meant to be "easy", but when done with care and hindsight, it can be a great way to synchronize your organization toward a shared vision.

Agile adaptation stages: where do we stand?

To begin with, we have witnessed that Agile transformations in the following three states can exhibit unhealthy behavior for a project intake model. These 3 interim organizational states to watch out for are:












The Agile transformation...

- 1 ... has started, but not matured
- 2 ... has ended in a contentious, mixed state, due to factions in perception and motivation of the end state, since opportunities exist for further adoption of Agile practices
- 3 ... has ended in an inefficient, mixed state of Agile and Waterfall methodologies, where the organization has accepted this suboptimal state, typically due to known limitations

Taking a quick look at the above 3 states, the first one appears to be the most clear but can eventually lead toward states two or three. State two is probably the most interesting and complex organizational state due to the misalignment of what individuals both expect and experience. It often ends up with a disconnect between the top-down and bottom-up movements or even within the same horizontal slice of a company leading to a contentious culture. We advise state two to go see an organizational therapist immediately!

Wrong reasons for Agile adaptation: why are we here?

In the above 3 states, organizations in transition to Agile often times decide to execute projects Agile for the wrong reasons, some of which include:

Wrong Reason	Warning
<p> The interfacing teams/ programs are going Agile, so should we!</p>	<p> How mature are their Agile practices? Do the delivery milestones and practices align?</p>
<p> Even the teams/ programs not directly impacting the project are going Agile, so should we!</p>	<p> What measurable benefit has been identified for going Agile? Are we ready to operationalize this change, and to embrace an Agile mindset across the program?</p>
<p> The program is Agile but interfacing teams/ programs are not yet ready, or are Waterfall. So the program decides to develop incrementally while in isolation, and the other group(s) delivers their piece of the overall solution all at once further down the road... At least we are partially Agile!</p>	<p> Can we deliver quality code despite misaligned milestones and readiness of dependencies? Do the delivery milestones and practices align?</p>
<p> Our group has Continuous Integration tools to use, so let's go Agile all through!</p>	<p> Do we use Scrum/ Agile practices (such as XP) other than CI? Are environments ready or available to each project? Do we have adequate code coverage?</p>
<p> The "leadership" wants the program to be Agile, so we better!</p>	<p> Do we have a stable roadmap and a backlog that is being continuously refined? Does leadership protect and empower the Agile teams? Is the business able to quantify and prioritize requirements on a regular cadence?</p>
<p> Someone had set the project funding type to Agile, and now it's too late to change, so let's just be Agile!</p>	<p> Does upstream management understand the Agile concepts needed to make an assessment of the project? Did the project team voice what the added risks are for the initiative, given the realities of the team/program's capabilities?</p>
<p> The business got a late request, and there's not enough time to do waterfall Business Requirements/ Functional Requirements, so let's go Agile and avoid BRs/ FRs.</p>	<p> How can we accept late requests into Sprints before we have the entire scope fully understood? Even if BRs/ FRs are not authored, is the project scope defined and agreed to? Are the user stories for the next Sprint defined and ready?</p>

Phew, so that was a mouthful, but there are a lot of reasons that we've seen mixed-portfolio programs decide to choose their delivery methodology as Agile at the decision gate. Some of these may not be easy to assess this far upstream, but if there's a way for you to keep these warnings near and dear to your heart while the project moves down the funnel, then there's always a chance to make assessments and to mitigate risk later on.

Consequences: what more can go wrong?

Next you may wonder, what happens if an organization decides to force a project to be delivered in an Agile fashion despite all of these warnings? -- Well, here are some risks and their manifestations into issues we have observed in the scenario below due to forced Agile adoption...

If the organization recognizes and accepts that it is in a transitional state, due to which multi-application project schedules are out of sync, it may decide to hedge its risks by deploying code to production in an "off-mode". This decision is best made prior to solution design as it typically increases design, development, and test costs as well as the overall duration. That said, implementing feature toggles in production is inherently risky for many reasons:



value remains undelivered to the customer

code sits in production without monitoring, use, or full extent of testability



off-mode features can increase size on client or server without value



training for code toggled "off" is incomplete for team(s) and program



it may not be possible to develop and test all features fully in both off and on states



On the other hand, if the organization is unable to proactively identify these warnings and mitigate risk using techniques, such as "on-/ off-modes" for code in production, then the above risks can manifest into the following issues:

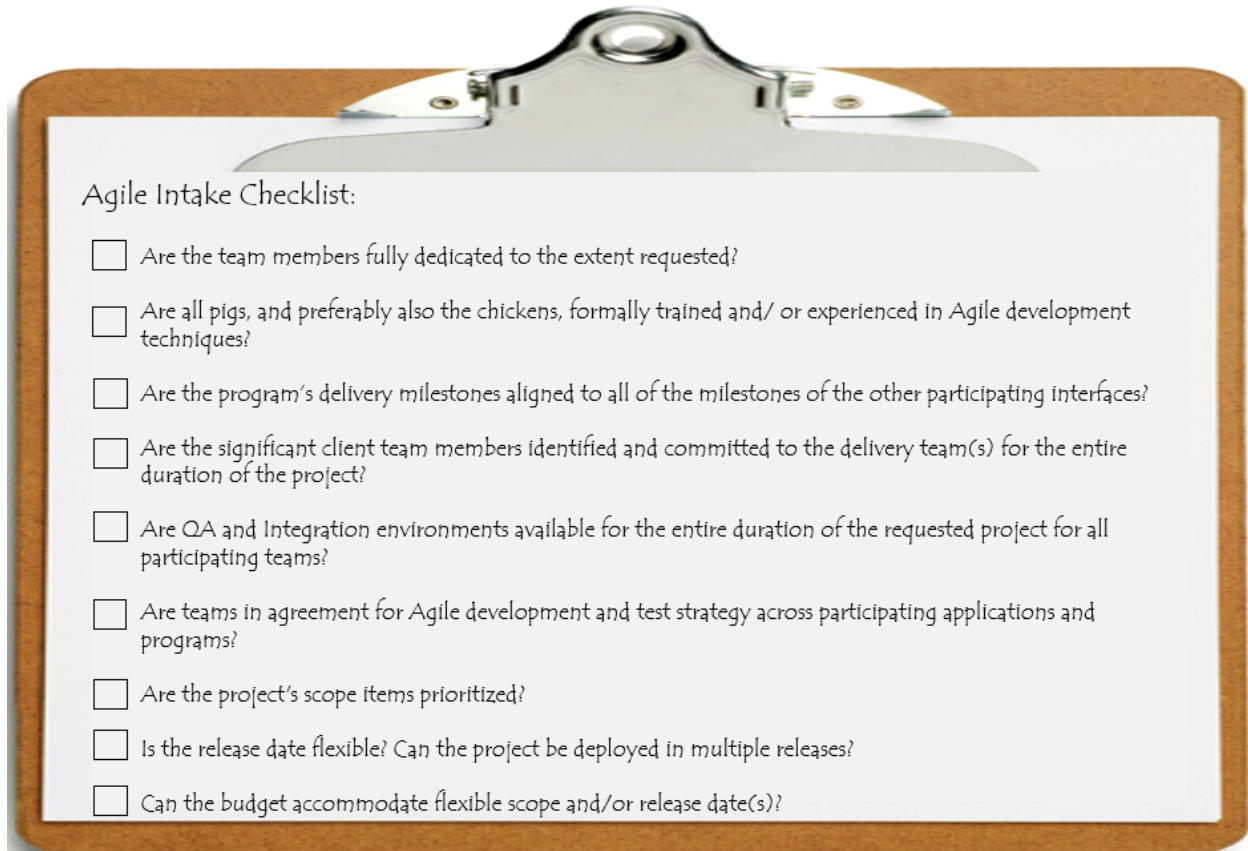
- ↑ Missed project schedules
- ↑ Contention between business and delivery during the development and testing phases
- ↑ Post-production defects
- ↑ Potential disruption to a team delivering new value features if feature turn-on is not planned for/ unknown



- ↓ Deteriorated feature quality
- ↓ Decreased confidence for code integration
- ↓ Reduced cohesion among projects' inter and intra- application teams

What can I do? - The checklist

If you are willing to accept that these behaviors are undesirable for an organization and that each project should be consciously assessed during the intake process for fitness to the software development methodology, then as a preview to the framework in the upcoming articles here is a short list of questions to consider for your next project intake:



Now that we have introduced you to the signs to look for and issues faced by organizations who do not heed those warnings, we hope that we have empowered you to perform a preliminary assessment of your projects to the adequate software development methodology.

In our next article we will develop on this fitness assessment and introduce a framework for effective intake of Agile projects. But first, we invite thoughts and feedback from you, our readers and audience.

(Note: The icons included in the images were used under the Creative Commons License)

In this second article, we will discuss issues and challenges found in several organizational contexts and then present a Lean and "lightweight" intake assessment that you can introduce in your organization right away. Remember, an Agile framework is not meant to be "easy," but when done with care and insight, it can be a great way to synchronize your organization toward a shared vision. We invite thoughts and feedback from you, our readers and audience. #Agile #Transformation #Project #Program #Portfolio #Intake #Scrum #Change #Assessment #ForcedAdoption #AgileIssues #AgileProjectIntake #AgileProgramIntake #AgilePortfolioIntake #Process #ProcessModel

Terry Schmidt, MBA, PMP, SMP

Strategic Planning Consultant, Project Design Expert, Workshop Leader and Keynote Speaker .
Very insightful... this article will be useful to agile pros as well as newbies