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What Are The Steps Involved in an Initial Agile Assessment?

Before you start going down an agile implementation path it is worth the effort to capture and document why you are doing this change, what problems you expect to see, and how you will know you are successful. These need to be expressed in terms of business drivers, not in terms of agile, so everyone is aligned on the objective.

The “why” part is particularly important. Organization change is hard, and your organization will often push back (what I call “organization anti-bodies”). Having a solid understanding of why we are doing this will help us maintain the resolve, the urgency, to get through the complex issues.

Process

What I have found effective in developing the “why” and also gaining a degree of buy-in is run an assessment workshop.

Objective

To understand business objective of transformation to agile, to determine basic approach, potential obstacles, and metrics for success.

Method

Expect leadership to be involved in a day or two days (depending on how many interviews) set of activities. “Leadership” includes management as well as technical leadership.

Sample Agenda

- “Business reasons” workshop. All leadership. 2-3 hours. What are the business reasons we are going toward agile? What business problems are we trying to address? Which of these makes sense to address through an agile transformation. Result - prioritized list of objectives that will be used to drive the implementation of agile.
- “Obstacles” workshop. All leadership. 2-3 hours. Based on our current understanding of agile, what problems do we expect to see as we roll out the next phase of agile? Result - prioritized list of obstacles that we will need to address in the short term. Note: “obstacle” is defined as “anything which will slow the adoption down”.

- “Metrics” workshop. All leadership. 1-2 hours. How will we know we are being successful with the agile implementation? What metrics do we want to track? What kind of assessments do we want to run? Result – list of approaches we will need to track, with a plan to develop “baseline” information.
- One-on-one interviews. Each discipline lead in turn. Assess current agile knowledge, current thinking about agile, ideas for how to rollout, additional more detailed discussions of objectives, obstacles and potential metrics.
- “Review” workshop. All leadership. 1-2 hours. Gather up results from workshops and interviews. Pull together base plan for training and coaching. Determine next steps and coaching required to get started. Result – documents (simple i.e. This is not a book) set of results and basic plan.

WARNING!

These workshops work best when done face-to-face and without having proxies do the work in the place of leadership.

Tools

During interview process we may (depending on whether there is value) use assessment tools from [Eliassen](#) to document some of the results.

Please get your own copies:

- [agile-maturity-matrix-organization-edition.xlsx](#)
- [agile-maturity-matrix-team-edition.xlsx](#)

[Consultant](#), [Tools](#), [Enterprise](#), [Organizational](#), [Kickoff](#), [FAQ](#)

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