Agile Readiness Checklist Template

As you complete this template, insert your department/organization information in the header and footer where appropriate, as well as the name of your project, if known.

# 6 Things to Check Before Starting an Agile Project

This assessment provides insight into whether your organization is ready to proceed with a user-centered, iterative agile approach on a project. This template is designed to be completed once you have read the Agile Readiness Checklist guidance on the website. Partner with your organizational leadership to complete this assessment. An honest assessment of the agile maturity of the organization is key. Use these findings to guide future planning of the effort. A finding of “no,” “sometimes,” or “not sure” (shaded boxes) in an assessment area may signal less than ready, however, that should not necessarily be a barrier to moving forward. Instead, include in your planning mitigation strategies for the areas where additional organizational readiness work may be appropriate.

The assessment will explore the following 6 areas of organizational readiness:

* Organizational Culture
* Previous Experience
* Environment and Technology
* Organizational Flexibility
* Training and Assistance
* Commitment to User Research

# Organizational Culture

The following set of questions will focus on the organization’s culture and whether it is ready to support an agile effort. Each question should be answered with a “yes,” “no,” “sometimes,” or “not sure.”

* In areas where you have answered “yes,” you are ready to proceed.
* Those that you answered “no,” it is recommended to work with an agile coach to help prepare your organization to achieve the expected outcomes.
* Where you have answered “sometimes,” you should engage your organization’s leadership to understand the circumstances where the answer would be a “yes” and those where it would be a “no” (e.g. within different program areas or teams).
* Where you answered “not sure,” you should connect with the appropriate resources in the organization to find out.

| # | Question | Selection |
| --- | --- | --- |
| 1.1 | Is the organization’s leadership engaged in defining product strategy?\* | Yes | No | Sometimes | Not Sure |
| 1.2 | Is the organization committed to developing best practices for product development? | Yes | No | Sometimes | Not Sure |
| 1.3 | Does the organization understand the challenges and costs of implementing business transformation projects? | Yes | No | Sometimes | Not Sure |
| 1.4 | Are project staff empowered to make decisions without manager involvement and are they accountable for their work? | Yes | No | Sometimes | Not Sure |
| 1.5 | Is a focus on satisfying customer needs a core value of the organization? | Yes | No | Sometimes | Not Sure |
| 1.6 | Does the organization have realistic expectations about the difficulty of delivering business transformation projects? | Yes | No | Sometimes | Not Sure |

\*If the answer to this question is “no,” “sometimes,” or “not sure,” it is recommended that a concerted effort is made to bring the organization’s leadership onboard. Additionally, leaders who may have a sponsorship role in a project selected from the portfolio that will be using iterative agile approach will also need to be on board.

# Previous Experience

The following set of questions will focus on the experience of the organization in successfully completing agile projects. Each question should be answered with a “yes,” “no,” “sometimes,” or “not sure.”

* In areas where you have answered “yes,” you are ready to proceed.
* Those that you answered “no,” it is recommended to seek appropriate training and work with an agile coach or seasoned professionals to deepen in-house knowledge and experience.
* Where you have answered “sometimes,” it is recommended to start with a smaller effort that can be a learning opportunity for the organization.
* Where you answered “not sure,” you should connect with the appropriate resources in the organization to find out.

| # | Question | Selection |
| --- | --- | --- |
| 2.1 | Has the organization previously developed and completed projects using an agile or iterative methodology? | Yes | No | Sometimes | Not Sure |
| 2.2 | Is your organization skilled at breaking larger efforts into manageable pieces that are then assigned and worked to completion? | Yes | No | Sometimes | Not Sure |
| 2.3 | Does the organization have resources who have previously worked on an agile project which can be leveraged? | Yes | No | Sometimes | Not Sure |
| 2.4 | Were previous agile projects delivered in a way that met the stated objectives? | Yes | No | Sometimes | Not Sure |

# Environment and Technology

The following set of questions will focus on the environment and technology needed to support an agile project. Each question should be answered with a “yes,” “no,” “sometimes,” or “not sure.”

* In areas where you have answered “yes,” you are ready to proceed.
* Those that you answered “no,” it is an opportunity to prepare the organization for such an effort. Additionally, you may want to consider seeking the guidance of an agile coach or other professionals to assist.
* Where you have answered “sometimes,” it is recommended to start with a smaller effort that can be a learning opportunity for the organization.
* Where you answered “not sure,” you should connect with the appropriate resources in the organization to find out.

| # | Question | Selection |
| --- | --- | --- |
| 3.1 | Is the organization willing/committed to creating colocation space and/or tools for an agile team? | Yes | No | Sometimes | Not Sure |
| 3.2 | Does the organization have decision making processes in place to support an agile team e.g. governance? | Yes | No | Sometimes | Not Sure |
| 3.3 | Does the organization have back-office processes in place to support an agile team? (e.g. HR, procurement, budget, security, and legacy system access.) | Yes | No | Sometimes | Not Sure |
| 3.4 | Is the organization committed to fully dedicate sufficiently skilled and knowledgeable team members for the duration of the agile project? (e.g. those with a track record of getting things done in a matrixed environment and whom the organization is willing to delegate sufficient decision-making authority.) | Yes | No | Sometimes | Not Sure |
| 3.5 | Does the organization’s leadership encourage collaboration? | Yes | No | Sometimes | Not Sure |
| 3.6 | Is the organization prepared to contribute resources in order to form a multi-disciplinary project team? | Yes | No | Sometimes | Not Sure |
| 3.7 | Does the team have tools to demonstrate value and progress associated with the effort? (e.g. status reporting, burn down chart, velocity) | Yes | No | Sometimes | Not Sure |

# Organizational Flexibility

The following set of questions will focus on the organization’s openness to change and flexibility to respond to new information. Each question should be answered with a “yes,” “no,” “sometimes,” or “not sure.”

* In areas where you have answered “yes,” you are ready to proceed.
* Those that you answered “no,” it is recommended to work with an agile coach to help prepare your organization for change. Further understanding of why the organization is not flexible will be key to developing a strategy to removing such barriers.
* Where you have answered “sometimes,” it is recommended to seek out and understand why this is the case. Consistency will help to strengthen the organization and training may be needed to help bring everyone on board.
* Where you answered “not sure,” you should connect with the appropriate resources in the organization to find out.

| # | Question | Selection |
| --- | --- | --- |
| 4.1 | Is the organization comfortable with changing the priority or the order of delivery of requirements during a project in response to new information? | Yes | No | Sometimes | Not Sure |
| 4.2 | Is the organization comfortable with the project deliverables changing in response to new information? | Yes | No | Sometimes | Not Sure |
| 4.3 | Is the organization comfortable with the implementation strategy changing in response to new information? | Yes | No | Sometimes | Not Sure |
| 4.4 | Is the organization committed to developing a unified high-level project scope (the product vision, objectives, and key results)? | Yes | No | Sometimes | Not Sure |

# Training and Assistance

The following set of questions will focus on the resources and training needs. Resources who will work on an agile project will need to have the proper knowledge, experience, and training pertaining to agile development. Each question should be answered with a “yes,” “no,” “sometimes,” or “not sure.”

* In areas where you have answered “yes,” you are ready to proceed.
* Those that you answered “no,” it is recommended that you properly engage and train the resources that will be involved to ensure the success of the project.
* Where you have answered “sometimes,” it will be helpful to understand why this is the not the norm. There may be other factors that should be looked at to ensure that the proper support is provided.
* Where you answered “not sure,” you should connect with the appropriate resources in the organization to find out.

| # | Question | Selection |
| --- | --- | --- |
| 5.1 | Will the project be able to secure resources that have in-depth knowledge and experience with agile delivery? | Yes | No | Sometimes | Not Sure |
| 5.2 | Will the Stakeholders and management have access to the necessary knowledge and experience to support agile delivery? | Yes | No | Sometimes | Not Sure |
| 5.3 | Will the resources have an understanding of the level of effort required to undergo an agile project? | Yes | No | Sometimes | Not Sure |
| 5.4 | Will there be ongoing mentoring and training to support the resources and project where needed? | Yes | No | Sometimes | Not Sure |
| 5.5 | Does the organization have any resources who have previously worked on an agile project? | Yes | No | Sometimes | Not Sure |
| 5.6 | Are the resources comfortable being part of teams where their role may change based on what is needed and their skillset? | Yes | No | Sometimes | Not Sure |

# Commitment to User Research

The following set of questions will focus on whether the organization understands the value of user research and is committed to ongoing user engagement for successful delivery of agile projects. Each question should be answered with a “yes,” “no,” “sometimes,” or “not sure.”

* In areas where you have answered “yes,” you are ready to proceed.
* Those that you answered “no,” it is an opportunity to spark discussions about what user research is and its role in agile delivery.
* Where you have answered “sometimes,” it will be helpful to understand why this is the not the norm. There may be other factors that should be looked at to ensure that the proper user engagement is conducted.
* Where you answered “not sure,” you should connect with the appropriate resources in the organization to find out.

| # | Question | Selection |
| --- | --- | --- |
| 6.1 | Is the organization prepared to conduct some user research in advance of finalizing the product vision, objectives, and key results? | Yes | No | Sometimes | Not Sure |
| 6.2 | Does the organization have the necessary budget allocated to conduct initial user research? | Yes | No | Sometimes | Not Sure |
| 6.3 | Is the organization committed to spend time understanding the needs of the current and prospective users? | Yes | No | Sometimes | Not Sure |
| 6.4 | Is the leadership of the organization (Stakeholders and management) willing to support the findings that have been gathered by undergoing user research? | Yes | No | Sometimes | Not Sure |