

DRAFT Worksheet – Working Copy

Agile Portfolio Metrics to Guide your next Enterprise-wide Road Trip *(with road trip analogies)*

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Portfolio-level leadership uses aggregate metrics derived from multiple data points at the team level to manage risk, promote alignment, and engage accordingly to enable successful delivery.

- **Value Delivered** *(Arrange all the items you'd like to pack in the trunk of your car by the value they provide you from least to greatest, then start packing items of the greatest value until you run out of room or believe you have enough to get by)* – The relative value of the epics that a team has made available to actual users of their product – relative value is determined by comparing epics within a product and also by comparing epics across the products within the portfolio – desired trend is for epics providing the greatest relative value to a product / release to be completed first, seeking to minimize (or possibly eliminate) investment in lower value epics.
- **Planned vs. Actual Investment** *(We thought we could drive from Washington, DC to Richmond, VA on 1 tank of gas, did we make it?)* – A comparison of the planned investment in an epic vs. the actual investment to make the epic acceptable to the customer – can be tracked in cost or time, and is typically reviewed as an “epic-level” burn-down – this metric is intended to guide completion of epics within planned investment or for less than the planned investment amount.
- **Percent Complete & Accurate** *(The number of clothing items packed AND folded correctly to prevent wrinkling while in your suitcase)* – The percentage of work items completed by a team that also meet the team’s “definition of done” (also called done criteria) for releasable software – This percentage is intended to be high so as to minimize rework following the initial completion of a work item and is intended to promote recommended team practices, including having well-defined and understood “done criteria” inclusive of all activities to deliver working software.
- **Whole Team Contribution** *(How many people are driving a portion of the route from Washington, DC to Richmond, VA?)* – The percentage of people on the team who make a contribution to a work item within its lifecycle (typically rolled up to Epic-level for portfolio / leadership discussions) – This metric is intended to promote sustainable process, sharing information, and eliminating the risks associated with having specific individuals build/test significant portions of an Epic (vs. sharing work across team members).
- **Blocker Clusters & Cost of Delay** *(What are the most common sources of delay experienced during the trip – examples: construction, traffic due to accidents, traffic due to vehicle volume, food stop, gas stop, etc)* – This metric / data is intended to promote shared understanding of common types of impediments – leadership can use this data to identify common impediments impacting team(s) outside of team control/scope and mitigate them – Blocker clusters can also allow leadership to consult with teams on which sources of delay warrant a higher class of service for mitigation. A Cost of Delay metric can be computed based upon blocker data to justify investment for mitigation (if necessary).

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- **Release Frequency** *(How frequently do you consult the map to confirm you are on course – quiz: what is the release frequency equivalent if you like to drive with GPS instead of a map?)* – This metric is intended to promote collective focus (between teams and leadership) on agile’s primary measure of progress, the delivery of working software. By making release frequency between products / teams transparent, teams can have greater buy-in on leadership’s desire to release software more frequently. The release frequency interval is determined by when updates are deployed to production (real users / revenue generating business transactions) and can be tracked to differentiate between both minor (bug fixes) and major (new epics) releases if desired.
- **Team Net Promoter Score** *(Would you recommend the experience of this road-trip to a colleague?)* – A metric to assess team member engagement and satisfaction with working on a particular team / product (Team NPS can also be computed across multiple teams within a program). Ideally this NPS is high, but if it begins to trend down, leadership can have a proactive discussion regarding what could be done to raise the Team NPS and then assess the effectiveness of changes made – specific actions to raise Team NPS will vary from team to team based on the people on each team.
- **Product / App Net Promoter Score** *(Would you recommend the destination of this road-trip to a colleague?)* – A metric to assess user engagement and validate that the product and/or epics delivered meet user needs. Can be tracked at the app-level (default practice for consumer apps deployed via a public app store – 5 star rating system) but can be more granular (at the feature or epic level) if the product includes a mechanism for users to provide feedback.