

Agile and MS Project Forecasting Techniques

*Who Says You Can't Plan Agile in
Microsoft Project?*

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Presenter



Driving Results with Project Management Solutions

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Microsoft Partner
Silver Project and Portfolio Management



Learning Objectives

- ▶ Review Agile and Traditional Project Management approaches and how they co-exist
- ▶ Learn the key elements of Agile and Traditional project scheduling techniques
- ▶ Understand how to support Agile and Traditional Project Management using Microsoft Project

Presentation Outline

1. Timeline for Agile existence
2. Agile and Traditional Portfolio/Project Management concepts and how they relate to other business processes
3. How competing business needs can be met using forecasting techniques / business processes
4. Agile Scheduling Techniques
5. Governance Strategies
6. Tools



Agile, Lean and the Future

1950's Deming
Cycle and
Mindset

System Thinking
Fast Feedback
Loops
Trust People



1970's Lean
Manufacturing

Manufacturing
Excellence
Toyota
Production
System



1990's Agile
Software
Development

Software
Development
Excellence
Scrum
XP



2010 Lean
Startup

Market
Excellence
Customer
Development
Product
Discovery



Future:
Leadership &
Org-Wide Agility

Organizational
Excellence
Customer Focus
Collaborative
Structures
Leadership
Science





Key Concepts

Agile Planning

- ▶ Iterative Development Process with Short Cycles (2-4 Weeks)
- ▶ A Series of 'Sprints'
- ▶ Scope included in a Sprint is fluid
- ▶ Features / Scope effort scored using 'Story Points'
- ▶ Story Cards used for Describing Capabilities
- ▶ Includes a 'Groomed Backlog'
- ▶ Tools include 'Velocity' and 'Burndown Charts'

Traditional Planning

- ▶ Plan as much as the project as possible
- ▶ Define relationships for tasks
- ▶ Scope is iterative process
- ▶ Agile may be a section of a larger project
- ▶ Estimates for tasks include both work and duration
- ▶ Includes risk planning and other plans
- ▶ Tools include Gantt Chart, Progress reporting, and Forecasting

Traditional Processes & Agile Process Comparison

Linear Top Level Process

Annual Budgeting

Kanban, Lean
Budgeting

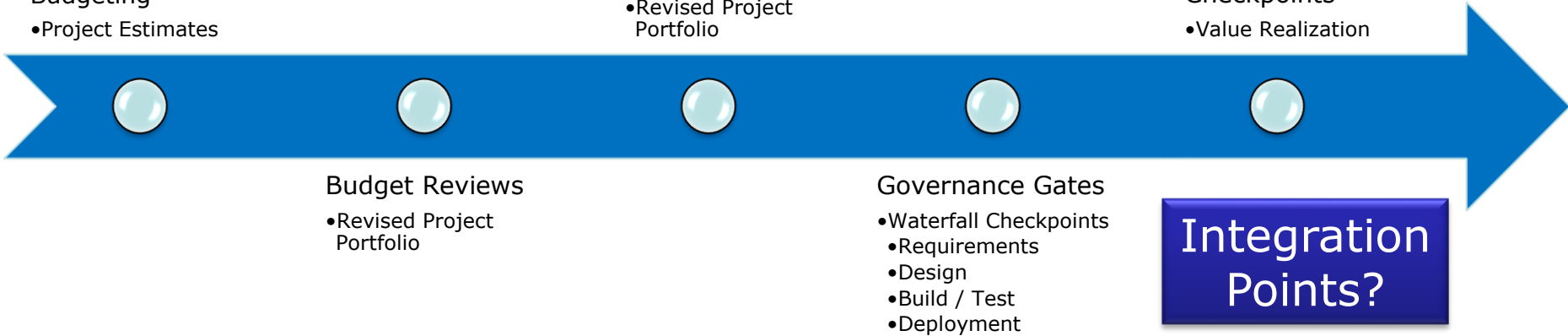
- Project Estimates

Final Budgets

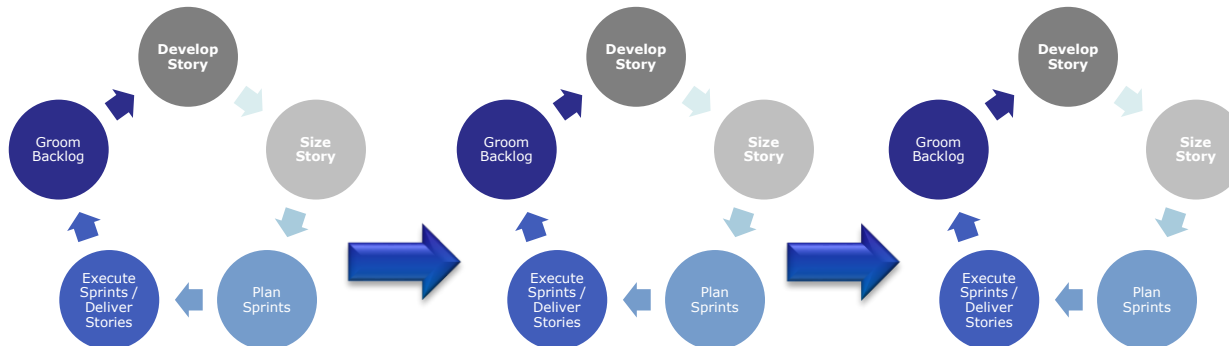
- Revised Project Portfolio

Cost / Scope
Checkpoints

- Value Realization



Agile Delivery Process





Standard Business Processes & Attributes

- ▶ Annual Budgeting Cycle
- ▶ Business Goals / Vision Planning
- ▶ Project Proposals and Business Cases
- ▶ Strategic Project Selection
- ▶ IT Project Governance
- ▶ Project Portfolio Planning
- ▶ Management By Objectives

Key Attributes

- ▶ Linear – With Deadlines
- ▶ Progressively Elaborated but over longer cycles
- ▶ Change Handled as Exceptions



Program Portfolio Management

- ▶ Customer Value
- ▶ Rough order of magnitude
- ▶ Number of Epics
- ▶ Number of Sprints
- ▶ Generic Resource Allocations
- ▶ Fail often - To deliver quick
- ▶ Sunset existing systems and replace with new ones

Agile Governance and Portfolio Planning - Kanban

- ▶ Ideation/Demand Funnel
- ▶ Strategy
- ▶ Sizing (Estimating)
- ▶ Communicating a New Language – Agile
- ▶ Controls – through all levels
- ▶ Rolling Wave Budgeting (iterative)
- ▶ Portfolio, Program & Project Hierarchy
 - Alignment
 - Aggregation
 - Consistency
- ▶ Roles and Responsibilities
 - Traditional and Pure Agile



Meeting Management Needs What? When? How Much?

Agile

- ▶ What = Story Cards
- ▶ When = Based on Incremental Resource Capacity & Estimated Story Points
- ▶ How Much = Total Backlog
- ▶ Sprint Velocity

Traditional

- ▶ What = Scope (WBS and Tasks)
- ▶ When = Based on the Resource Capacity and Work Estimates
- ▶ How Much = Total Project Schedule

Demo

You are the project manager for a Hybrid project, some of which includes managing the design team that is coordinating the documentation and a software development Sprint team. You would like to see everything in the same schedule.

The Sprint team has decided to use Microsoft Project to manage their sprint work, this could be a connection to SharePoint list also, if needed.

Mapping Agile Concepts to Microsoft Project

Agile Sample	Microsoft Project Sample	Notes
Sprint	Summary Tasks	Fixed Dates / Duration
Stories in a Sprint	Child Tasks	Drag & Drop Management
'Story Points' (effort)	Custom Field	Alias Existing Field Modified Fibonacci Range
Story Cards	Notes Page	Images, Text, Bullets
Story Priority	Priority	Drag & Drop Management
Velocity	Custom Field & Formula	Completed Stories Only
Planned Velocity	Custom Field & Formula	For sizing a Sprint
Burndown Chart	NEW Standard Reports!	Out of the Box in Microsoft Project



Formulas and Filters used in this Demo

- ▶ Sprint – 1 thru X and 99 = Backlog
- ▶ Story Points (Duration)
- ▶ Planned Velocity (Number) = [Duration]/480, Rollup Task and Group summary - Sum
- ▶ Velocity (Number) = IIf([% Complete]=0,0,[Duration]/480), Rollup Task and Group summary - Sum
- ▶ Story Indicator (Text)= IIf([Duration]/480=1,"Not Estimated",IIf([Duration]/480<=8,"Low",IIf([Duration]/480>=18,"High","Mid")))

Filters:

- ▶ Backlog – Not in a Sprint
- ▶ Sprint – Sprint number does not equal "Not in a Sprint" items
Sprint Number – Selection off a dropdown

Q & A – Thank You



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