Collaborative Chartering

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Choose a Project
( past – present – future )

Tell Someone Your Project Story
( include the why and the what )

DevJam Chartering
Logistics and Expectations

From Ideas to Iteration (a journey in three parts)

Designing Agility

Developing Products

Discovering and Delivering
From ideas ... 

Design 

- Selecting and Suggesting 
- Questioning and Learning 
- Planning to Coach 

Collaborative Chartering 

- Pragmatic Personas 

Develop 

- Planning to Discover 
- Setting the Stage 
- Planning to Deliver 

Deliver 

... to iteration 

The larger journey ... 

Getting Ready 

- Developing Products 
- Discovering / Delivering 

Continuous Delivery 

- Iterative Learning 

Reflective Correction 

- Dealing w/ Adversity 
- Maintaining Health 

Staying Productive 

- Evolving the Process 

... to sustained production
Chartering Goals (*why*)
( teach an old practice new tricks )

Collaborative Chartering (*who*)

<table>
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<tr>
<th>Immediate Community</th>
<th>Extended Community</th>
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Chartering a Project Story (*how*)

- Name and Timeframe
- Elevator Pitch / Value Statement
- Goals - Success Measures
- Community Mapping
- Working Agreements
- Strengths - Constraints
- Cadence - Logistics
Discussion over Documentation

A project story for the newbie

Start with a Name

Add a Timeframe

Add an Elevator Pitch

Why are you building?
What you are building?

Focus on short and memorable
- did you fail? -

- did you learn? -

- what’s the difference? -
  (between failing and learning)

What Does Success Look Like?

**Project Charter:** Mortgage Reprocessing  
Time Frame: start of Q3 and end of Q4

**Elevator Pitch:** Less papers means less manual mistakes; build a new system with a sustainable process

**Goals**
- Prove proposed technology - Move away from paper process
- Usable system to pilot - Validate the ability to have dynamic business rules
- Adapt to business and regulatory environment - Show value of iterative development
- Build confidence and buy in with business users - Fine tuning estimates (validate sizing)
- Have fun and learn (new knowledge)

**Value to Company**
- Build efficiencies in field using technology - Shorter processing time with fewer errors
- Straight through efficiencies - Increase service level agreements with customer
- Increase business feedback

**Success Measures**
- There is continuous feedback from business community
- Plans are reviewed and updated based on iteration outcome
- Community is improving on delivering on commitments and learning from each delivery
- Status of request on-line are viewable
- Business rules can change to manage work load

Add a few goals

Add a few success measures
Mapping the Project Community

Challenging The Matrix

Working Agreements

(values, strengths and constraints)
Visible is Valuable

Cadence and Logistics

Planning Cycles
Daily Meeting
Core Hours
Collaboration Times

How and when will you connect?

Discussion before Documentation

- the blur is intentional -
Find someone to pair with and share your project story

Leave them knowing why you are doing what you are doing and more (if possible)

Where Are You Going and Why?

Why are you building what you are building?
  
  What does success look like?
  
  Who is in the mix and who is missing?
    
    What are your constraints?
    
    What will be your cadence?

Chartering is Checklist Thinking

Questions?

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