

CHAPTER 1

Defying Gravity

“The sum of the whole is greater than its parts.”

—anonymous, from Gestalt psychology

For ages, humankind has watched birds soaring and wanted to fly. We stayed earthbound until we learned about the effects of gravity and how to overcome them. Now we defy gravity with a launch or liftoff. We generate sufficient energy at the start of flight to give us the momentum to overcome gravitational pull and boost ourselves skyward.

When projects start, a liftoff generates the momentum teams need to overcome the inertia presented by lack of common purpose, unclear communication channels, undefined working relationships, and other areas of ambiguity. A liftoff also provides the positive force that moves a project toward its destination—successful delivery.

Every project has many parts: a visionary with a Big Idea; people who are directly and indirectly involved in achieving the result; a particular physical space and psychological climate; process tools and techniques; and more. The first time all of these parts come together sets the tone and lays the foundation for everything to come later in the project.

Why we wrote this book

We have experienced projects that began well, but ended poorly or not as intended.

How you start a project is not the whole answer for a successful end. However, we’ve never experienced a project begun in disarray that was able to end well, at least, not without a reset to clarify the core intention and essential understandings across the project community. In effect, to accomplish the mission, they still had to “start the project,” even if the project organizers and members didn’t do it when they began working.

As leaders of hundreds of retrospectives and as coach and project manager to Agile projects, we've seen that a great proportion of the issues teams wrestle with can be traced back to a lack of clarity and alignment from early days of the project. Miscommunications, unexamined assumptions, and misperceptions create an environment in which people make decisions and take actions that unintentionally work at cross-purposes and undermine overall progress. Such dynamics prevent people on the project from seeing the whole system, and cause rifts and resentments in the project community. Taken together, they impede progress.

In a project liftoff, everyone associated with the project comes together to define the initial intentions, approach, and plans, and to begin team building. The sponsor commits support for expending time to align understanding of project objectives among the project community—executives, managers, development team members, customers, and other primary stakeholders.

When sponsors and managers take the time to consciously focus on a liftoff to give their project core teams a great launch, we've seen an accelerated leap into the project work. Projects build momentum by setting aside a few hours or days for starting. Project communities and teams discover and construct their supporting systems, acquire confidence and continuity, and plot the initial trajectory for their flight.

In the teams we work with, we give attention to the liftoff because:

- it's hard to recover when teams don't start well; an unaligned start results in a team spinning its wheels and losing ground
- uniting strategy and execution keeps everyone focused on what the customer needs
- the business and the development team move into alignment, creating a shared understanding of what is involved
- a group of people gets the opportunity to begin building themselves into a team before the pressure of development work begins—to get to know each other as people with skills to contribute, as well as to understand and clarify strengths and roles needed to do the work
- attention to starting well helps everyone to express what the project can or should accomplish and begins the collaborative effort
- everyone learns about the broader project community and what each group of stakeholders needs as a deliverable or wants from their involvement

As the first act of flight, a rocket launch requires an entire set of systems to successfully lift the vehicle—not just the vehicle itself, but firing control systems, ground control communications systems, the launch pad, and everything needed for smoothly moving off the ground into space. Likewise, your project needs its entire set of supporting systems in place to begin a successful journey to delivery.

We wrote this book because we want to promote ways to intentionally launch agile projects and teams toward success.

Defining the boundaries of a project liftoff

Your project originates when a visionary recognizes a business need and the business side of your organization authorizes the investment in people and resources to address the need. Before the liftoff, we expect you'll have already received approval to initiate the process and have assigned or assembled a project team.

Now you are at the point of getting your project underway and planning the liftoff activities that will give your project the best start.

For the purposes of this book, the *sponsor* is the visionary or the person who has decided to spend the budget, assign people, and commit resources. She says, “let’s do this!” and gives permission to continue throughout the project. Sponsors may continue to serve the project as the product manager or may turn over that responsibility to someone else.

The *product manager* (sometimes known as the *product owner* or *on-site customer*) has ultimate responsibility for delivering business value to the organization and customer value to the buyer or user. Unless the sponsor chooses to kill the project, the product manager is the person who will say, “We’ve come to the end. Let’s stop!”

The sponsor and product manager collaborate with the appropriate partners to plan the liftoff.

The *core team* takes responsibility for building the product. *Project community* members contribute time, resources, and information to the core team, as needed, and may receive hand-offs, information, and deliverables in return. The project community includes many of the stakeholders for the project.

Project managers, team leads, team coaches and scrummasters will support the core team on a daily basis.

In this book, we explore ways to organize and conduct liftoff meetings, including the vital step of chartering for Agile teams. You’ll find real-life stories of how others have effectively helped teams start (or re-start) their projects, a variety of team

activities to fuel your liftoff, and a framework for effective, “just enough” Agile chartering—a lightweight, minimum-documentation approach to creating initial understandings, agreements, and alignment about the work and how to accomplish it. A liftoff concludes when the:

- sponsor, product manager, and core team have initial commitment to a common purpose
- sponsor, product manager, and core team have a shared initial understanding of success indicators and measures
- core team agrees on initial approach to work
- core team members appreciate their interdependence, skills, and potential
- core team has enough initial understanding of business needs, risks, and opportunities to begin the work
- sponsor re-commits to invest in the project

In our experience, following the Agile chartering model provides a efficient and effective way for projects and teams to accomplish the outcomes in the list above.

Will you benefit from reading this book?

For people in Agile software project leadership roles who want to ensure their project is positioned for success from the start, we’ve written this book to demonstrate the payoff you can gain from chartering and other intentional project liftoff activities. We show how to lead liftoffs step-by-step, and unlike other books that focus on project management, innovation, strategy, or whole project life-cycle, this book takes a practical, pragmatic approach to beginning the Agile work effort.

Agile software project leadership roles include people with work titles like: executive, executive sponsor, CIO, CTO, sponsor, product development manager, product manager, product owner, project manager, agile team coach, scrummaster, agile team lead, engineering lead, development team member, business analyst, QA manager, QA lead, test lead, and anyone who is a stakeholder in an Agile project.

We’ve organized the book so that you can choose an approach to reading it that fits for you. If you read it cover-to-cover, you’ll find a thorough exploration of why liftoffs matter, how to accomplish a liftoff, and how Agile chartering fits into starting teams and projects well. If you choose to focus on a particular topic area, we’ve provided cross-references to other parts of the book you might find useful.

CHAPTER 2

Lifting Off

“Liftoff is the first moment of flight of a plane, a rocket or other space launch vehicle, when it leaves the ground.”

—Anonymous contributor, “Liftoff,” Wikipedia: The Free Encyclopedia. 26 January, 2011.

What is a project liftoff?

Maybe it *is* rocket science! Space flights originate when a visionary identifies a research need and finds support for pursuing it. Software and IT projects originate when a sponsor recognizes a business need, then authorizes investments in people and organizational resources to address it. The next step in both is the project liftoff.

You may plan your project liftoff as a one day work session, a week-long boot camp, or discussions, training, and preparation sessions spread over a few weeks. Base the length of your project liftoff on the complexity and uncertainty associated with your project. It’s influenced by factors like team members’ familiarity with each other and the domain, the steepness of the technical learning curve, the degree of agreement about the approach, and so on.

Project liftoffs typically start with an initial session to clarify the broad outlines and intentions for the project. This session may also include other planning, team building, and/or skill development activities. Liftoffs follow a variety of formats, including Agile chartering sessions, Agile practice boot camps, and other forms. We provide greater detail on alternative formats and optional activities in Chapter 3, Planning a Liftoff and Chapter 4, Designing a Liftoff.

Purpose of a liftoff

To launch successfully and complete its mission, engineers need to position the rocket correctly so it can take off in the right trajectory and acquire enough kinetic energy to overcome the pull of gravity.

Likewise, you can position your team and project community on the trajectory to success with an effective liftoff. It also provides the catalyst needed to start and sustain the work through the first stages.

An effective project liftoff:

- **Achieves alignment** by establishing a clear, shared understanding about what the project involves and why it exists.
- **Builds momentum** by getting the project community and core team to work together to start the project. Accelerates the project and overcomes inertia.
- **Clarifies roles** and develops working relationships among project community, core team, and sponsors.

Timing

The liftoff occurs after the sponsor has recognized a business need, authorized an investment in people and resources to address it, and identified a core team to satisfy it.

Earlier in the life of the project is better. Ideally, the liftoff happens before work has begun; however, in some cases, a retroactive liftoff can help a project regroup and get back on track—particularly if it started without a clear purpose, alignment, and understanding of context, or *PAC* for short.

Many kinds of liftoff activities offer helpful information and collaborative experiences, including messages of sponsor or executive support, boot camp training, retrospectives, team building, and Agile chartering. As a part of a liftoff, Agile chartering provides a critical link to purpose, alignment, and context. Whether reviewing an existing charter or developing a new one, some form of Agile chartering contributes critical value to the liftoff.