



The Technology & Integrated Communications Agency

Affinity's Project Management Methodologies

Agile

Hybrid Agile

Waterfall



Organisation and document details

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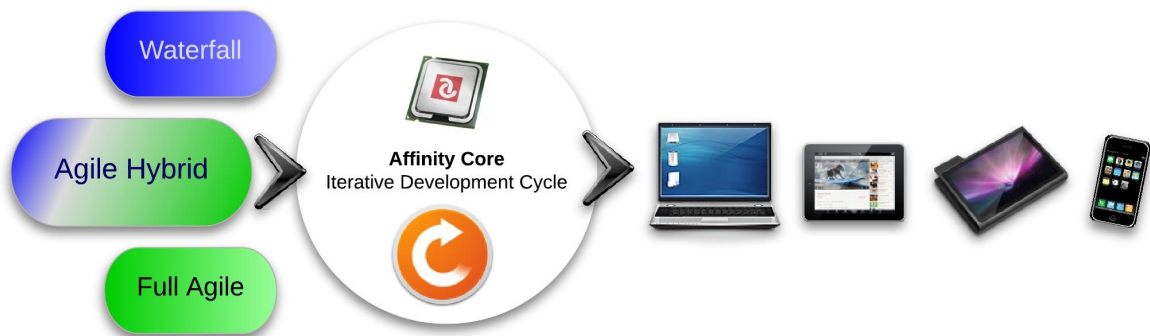
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AFFINITY PROJECT MANAGEMENT

Affinity is in an excellent position with its multiple methodology offerings. We recognise that there is not a “one shoe fits all” approach to delivering successful projects and have developed and matured our own processes to match the differing needs of our diverse client base.

Our mainstay method utilises a core iterative development team following tried and tested Scrum agile principles. We have tailored the entry points to this core competency to enable us to support everything from formal “waterfall” engagements to “full agile” projects and most things in-between.

Ultimately, we have modelled our approach to suit the needs of our clients rather than dictating one specific engagement process; we can fit in where you need us and deliver in a way that gives you the most benefit. As a key to this, early in any engagement we help our customers understand their own strengths and competencies in project processes and produce an offering that dovetails into a customers’ organisation rather than being at odds with it.



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PROCESS METHODOLOGY OVERVIEW

Discovery

All our projects involve the Discovery phase which is critical to success and is intrinsically tied to our process methodologies.

The diagram below demonstrates the phases and cycle for our stand-alone Discovery service. For more details please view: Affinity's Discovery Process.pdf



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1. Affinity Agile

Our full Agile project process works on an iterative backlog definition and refinement cycle that feeds into our core development scrum process. This is an industry standard approach and as well as operating perfectly on its own, can also plug into large-scale Agile programme methods such as the Scaled Agile Framework (SAFe).

This highly collaborative approach puts your project at the heart of our company and delivers a cohesive end to end process from your Project Roadmap, Product Owners and Analysts downwards. We will justifiably have high expectations of your consistent daily engagement with us in stand-ups, refinement sessions and story-card

2. Affinity Waterfall

Many of our clients are seeking a traditional waterfall engagement and we equally welcome that approach. If there are no significant uncertainties in your own requirements, we will work with you in an elaboration phase to formally detail them together. Once defined, we will happily deliver against a set budget and specification. We add some further value to this approach by vertically or functionally dividing up your requirement in-house and iteratively developing it within our Core team. This means that change control can be managed better (and minimised) should your documented vision change or something unexpected happens.

3. Affinity Agile Hybrid Approach.

We are realists – we know that a full Agile engagement across company boundaries is hard to achieve and also in an uncertain world that Waterfall requirements can and do change. Unless an organisation has reached a reasonable level of Agile ‘maturity’ it may actually be culturally or organisationally impossible for them to work in a fully Agile way.

We can solve this and we will do this in two ways:

An ‘out of the box’ approach to technology.

We will select and propose suitable open source packages, modules and templates that we believe can cleanly offer the solution that you are seeking ‘out of the box’ without the need for fundamental code writes at a low level. We promote taking this more straightforward approach to technology choice so that we can deliver your business value as soon as possible rather than building something from scratch.

Any package solution will require levels of configuration and customisation, however if the underlying business processes that they offer do indeed deliver your needs, then there is no need to re-specify those processes in agile story cards, and carry out a detailed business process mapping before we can start delivery.

A lightweight Agile backlog

Tied neatly to the above, we will embed our own agile expertise into your project and guide some of the Analyst and Product Owner activities particularly in the early iterations. Most importantly as we will have proposed technologies that minimise the need for the detailed requirements work that consumes a lot of time, you will be able to step back a little from the daily refinement and story breakdown work that would be present in a typical Full Agile engagement and predominantly focus on acceptance of the project deliverables at the end of each iteration.

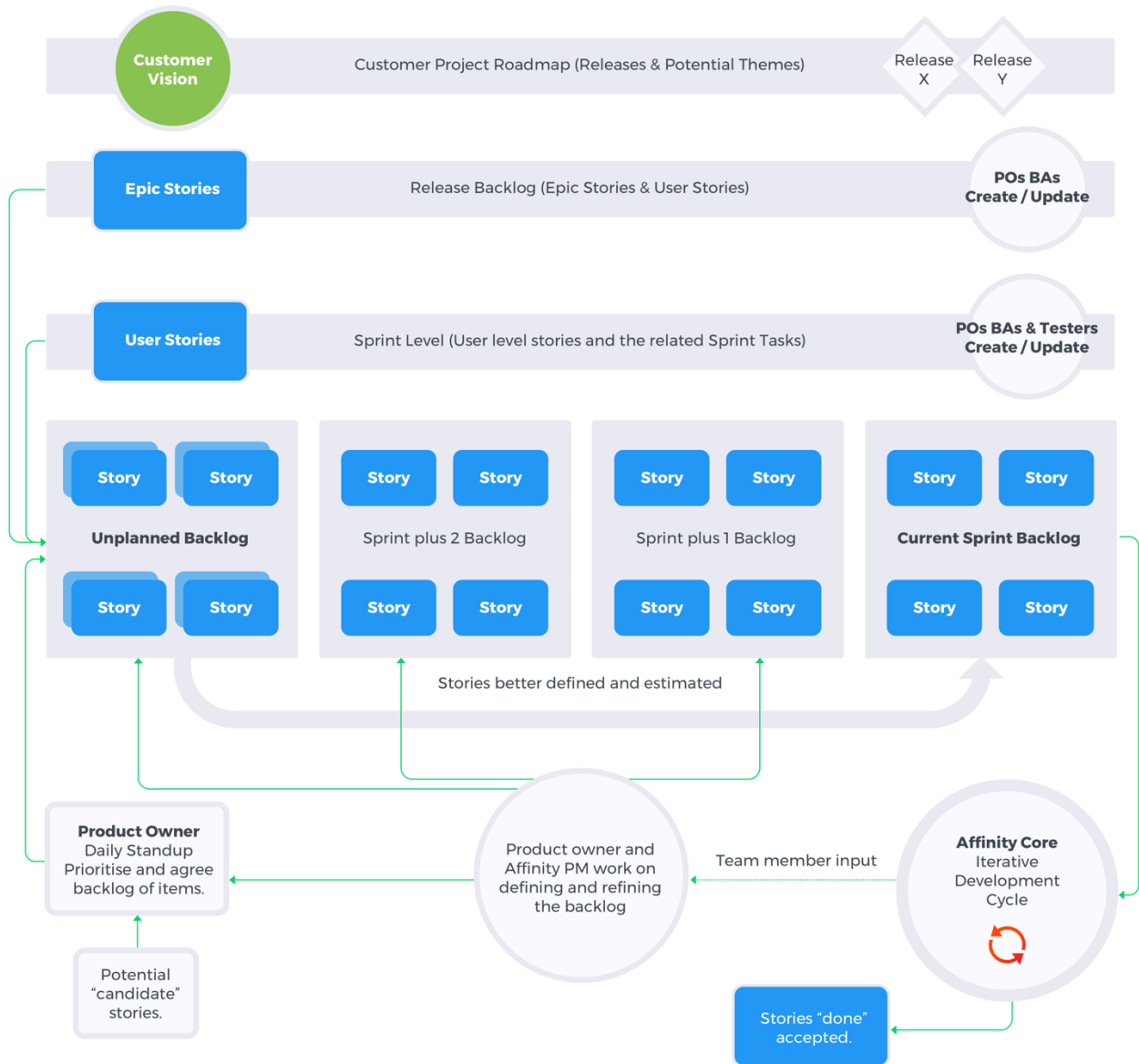
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1. FULL AGILE - Requirements Backlog

Managing and maintaining the product backlog is the key to a successful agile delivery, and we will wholly support those customers with a mature agile process in-house and the resources engaged and committed to act as Product Owners to dictate the project.

Our five-step process to backlog management is lightweight and consistent with industry standard practices:

AFFINITY AGILE APPROACH



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Step 1 - Project Roadmap

Activity	Project Sponsors and Product Owners meet regularly to define and maintain Project Roadmap.
Outcome	Aspirational dates for releases and potential Themes for those releases.
Note	Depending on the scale of a Project, this may only be needed at the start (i.e. a single project release). In larger engagements, it may be needed monthly, bi-monthly or quarterly depending on company vision

Step 2 - Project Backlog formation

Activity	Product Owners supported by Business Analysts and Architects break down the Themes into Stories (these may be 'Epics')
Outcome	Stories in the Unplanned Backlog
Note	This is an ongoing activity of Product Owners and Business Analysts throughout the project lifecycle. Architectural input can be recognised in the form of acceptance criteria or notes to Software Engineers

Step 3 – Story Sizing

Activity	Product Owners, Business Analysts and Team Members assign relative complexity rating to User Stories in the Backlog
Outcome	User Stories with complexity rating
Note	The Fibonacci sequence will be used for complexity values. This is an iterative process of refinement and complex stories will need significant further analysis and breaking down into smaller stories before they can be played by the core development team.

Step 4 – Prioritisation

Activity	Product Owners, assisted by Business Analysts prioritise the User Stories according to business need and in the light of current and predicted team Velocity
Outcome	Prioritised User Stories
Note	Ongoing activity of Product Owners as priorities may change all the time

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Step 5 – Scheduling	
Activity	Product Owners and Business Analysts meet on a daily basis to assign stories for the next two sprints and review any stories that have emerged during the current sprints.
Outcome	Stories assigned to sprints +1 and +2 (and current). New Stories added to the backlog in consideration of the overall Prioritisation from Step 4.
Note	New stories can emerge at any time. They are reviewed by the Product Owners and Business Analysts who agree whether or not the story should be added to the backlog. The aim is to have a two sprints worth of work ready and prepared to be played by the core scrum team at any one time

A note on collaboration

A Full Agile project is a highly collaborative process. During the whole Agile lifecycle, there will be user stories being generated by Product Owners and broken down into smaller stories all the time. There needs to be very regular meetings of all parties interested in the scheduling of the backlog to discuss and agree the scheduling of these stories and also any new "release candidate" cards that have been generated outside the backlog. It is vital that the work being planned into upcoming yet un-started sprints is still what is required most urgently so Affinity will be looking forward to a constant engagement with empowered Product Owners from the customer during the lifecycle of the project.

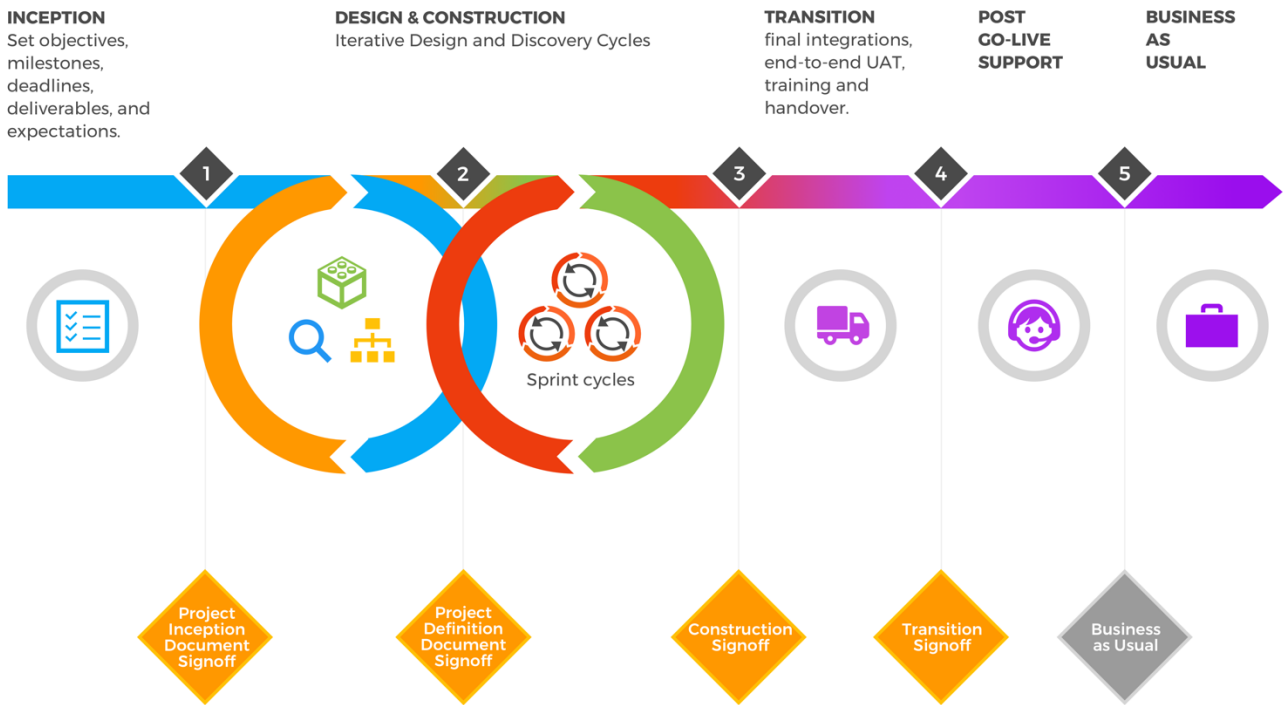
Standard commercial terms are T&M monthly in areas. (Though we will work to capped T&M subject to terms)

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2. AFFINITY HYBRID AGILE APPROACH

Our Hybrid Approach gives the best solution and the best outcome for companies who are on the agile journey but may not yet have matured their own processes enough to be able to manage a full Agile 3rd party engagement. It still provides a Full Agile ‘feel’ and is recognisable and auditable as an Agile Approach in its own right.

AFFINITY HYBRID APPROACH



Inception

culminating in PID sign off Phase and Invoice milestone

This phase follows the successful completion of contractual negotiation and project commencement; the key outcome is total clarity of the shared project vision.

We first consider all information you have provided and explore in detail the project requirements. As part of this process we:

- Gather and audit all source materials, relevant documentation and existing assets
- Review all internal/external briefing documents
- Review resources
- Analyse the intended audience/users
- Confirm the required project outcomes
- Identify and agree critical dependencies
- A high-level milestone chart is then prepared in order that initial tasks and responsibilities can be identified.

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Design and Construction

Including PDD sign off with Invoice milestone and culminating in Construction sign off with Invoice milestone

Our discovery process is focused on achieving the best user experience possible whilst also achieving the business objectives. This process although iterative, has distinct phases, each building upon **the preceding phase imparting the knowledge learnt from the previous phase.**

This finer detail of this process depends upon the specific project. Different projects require different approaches: the approach to a corporate intranet differs from the way we design a public facing website or app. Although we have a well-defined approach, there are elements in every part of the process that have to be custom designed for our clients and the project. For a full definition of our Discovery process please see: Affinity Discovery process.pdf

Customer Roadmap

We spend some time with you understanding your needs. We look at your aspirations, your problems and your potential company or divisional roadmap to develop a cohesive and realistic approach to solving the challenges you are facing.

Technologies

Once we have a better feel for your requirements we will propose potential technologies that will offer a functional solution to your requirements, we will evaluate & validate this with your enterprise architecture team



as necessary to ensure a non-functional and system integration fit as well.

The use of best of breed open-source applications and framework technologies are ideal candidates for our Hybrid, agile approach.

Modules and Templates

Once a clear Technology path has been validated we will demonstrate modules or pre-built business processes that are available in that technology to suit your needs. These may be in a ‘raw’ unconfigured state, however we will be able to give you a very good idea of what the end solution would look like and could deliver to you.

Because we would be promoting a modular approach with configurations and some “light” coding changes rather than building a solution from scratch, much of what would be discussed in a “Full Agile” project is not required. We will already know much of what would be needed to achieve a final product for you from the building blocks we propose, and we do not have to re-define the pre-built workflows and business processes that the Technology is offering.

This means that we can create a lightweight agile backlog with a relatively small input from you (most input will be relating to visual look and feel), and can then begin to play those “user stories” into our Core Delivery Team as with any Agile project. If we have already carried out this implementation-type for another client, much of the backlog will be “pre-canned” user stories from prior experience.

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We can move faster and be more Agile, by being Hybrid.

Agile Project Delivery

Our Core Iterative Project delivery team will deliver the backlog in the priority order that most suits your business requirements and you will be welcome to attend stand-ups should you wish to. Most of your efforts can be focussed at fortnightly show and tell sessions, and in the acceptance of the components and modules that we are delivering on this iterative basis.

Phased Releases

Depending on your business requirements we can take the potentially shippable product components and modules from above and package them up for staged releases to match your roadmap, or if you wish we can simply make a single release when the whole end-to-end business solution is ready to be deployed.

Training

How to manage and use the admin interface of the new system will form part of the iterative development cycle as we will be working and educating your team in a collaborative way. This will be augmented with a planned training phase in the Transition Stage, when the solution can be used from end-to-end. We will set up new user groups for other Key stakeholders and help your team teach these users how to access and use their bespoke interfaces.

Timescales

Clearly defined from the outset and monitored regularly.

Transition phase

Culminating in go-live sign off and Invoice milestone

This final phase builds upon the successful completion of the Construction phases and leads to final population of the website, live Integrations and end-to-end UAT and project completion.

Appropriate handover and training is then provided together with the necessary final deployments.

Milestone 4: Transition (Final) Sign-Off Meeting

The aim is to formally sign-off that everything has been delivered and the project has been completed satisfactorily. The project could now move into “Business As Usual” (BAU) with Affinity assuming a Support and Maintenance agreement has been negotiated and is in place.

Milestone 5: Post go live support (1 month)

Affinity will as part of the overall project budget, support you post go-live with any ‘How do I’ or any edge case bespoke development related issues that may have been missed in UAT. This does not replace a support and maintenance agreement as no security patches, updates or new bugs will be covered.

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3. WATERFALL

Our waterfall project management process follows industry recognized phases and milestones across the software development lifecycle. Following a successful tender stage the project can be formally commenced with the appointment of appropriate personnel to the Project Board, and their responsibilities agreed.

The Project Board will meet on key milestone dates and as required throughout the project lifecycle as/when required (but at least on a monthly basis). The board will consist of:

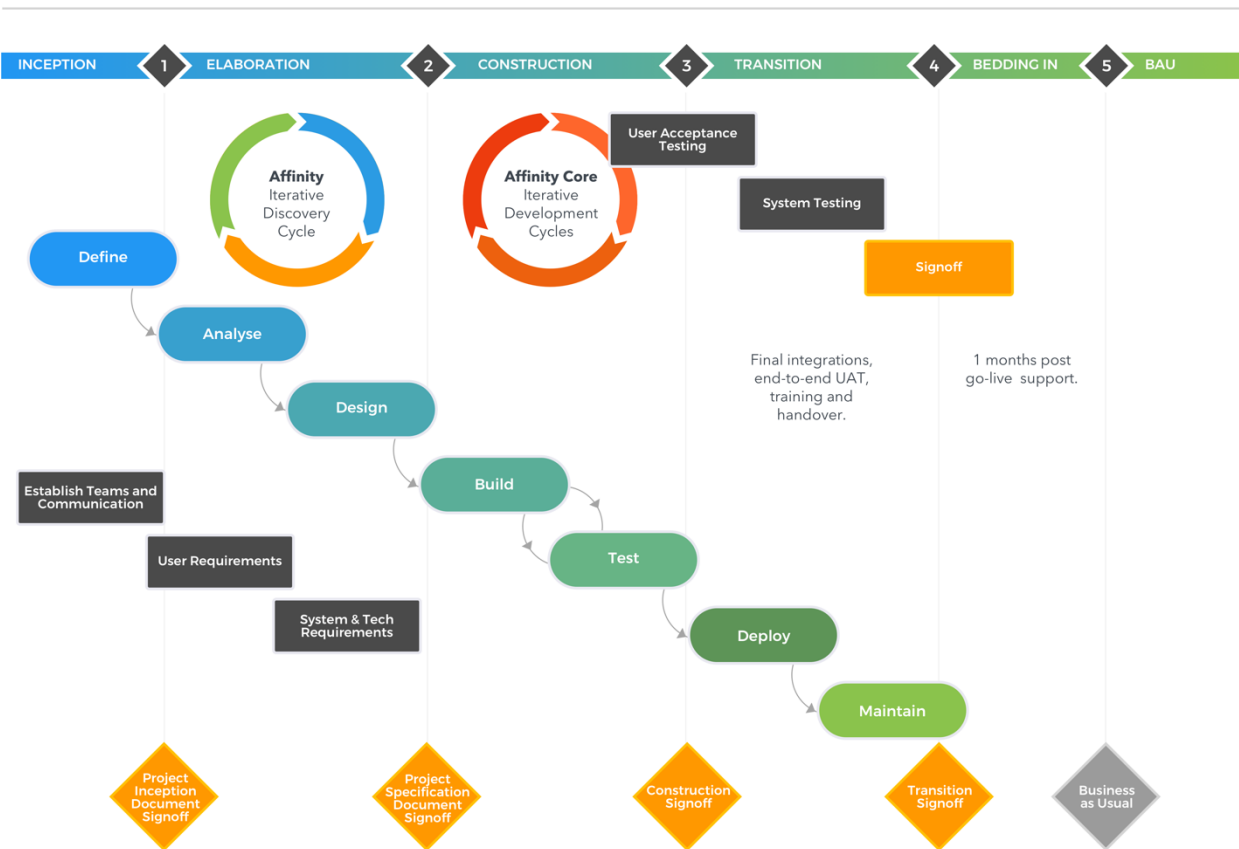
The ‘Project Executive’ has ultimate sign off of the project milestones/deliverables. They will also be responsible for overseeing quality assurance, risk mitigation and communication between the business and the project.

The ‘Senior User’ is responsible for ensuring that the deliverables meet the requirements of all relevant ‘end’ users.

The ‘Senior Supplier’; one of Affinity’s Technical Leads. They will be responsible for ensuring that Affinity is delivering as required, the technologies being used are appropriate and that the deliverables meet the requirements of the Project Specification Document (PSD).

The ‘Project Manager’; provided by Affinity. They will have overall responsibility for managing the project through the various development phases.

AFFINITY WATERFALL APPROACH



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Inception phase 1

Culminating in PID sign off and Invoice milestone

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We first consider all information you have provided and explore in detail the project requirements. As part of this process we:

- Gather and audit all source materials, relevant documentation and existing assets
- Review all internal/external briefing documents
- Review resources
- Analyse the intended audience/users
- Confirm the required project outcomes
- Identify and agree critical dependencies
- A high-level milestone chart is then prepared in order that initial tasks and responsibilities can be identified.

Milestone a:

The aims of this is to:

- establish clear and positive communications between all project members and define the most appropriate communication channels.
- agree the project concept, business case, and draft milestone plan
- agree the high-level requirements list
- agree the disclosure process and project governance
- This will ensure that all parties feel sure that they have a full and clear picture of all aspects of the project.

Elaboration phase 2

Culminating in PSD sign off and Invoice milestone

This phase builds upon the successful conclusion of the Inception phase, the Key outcome is absolute agreement and documentation of the project components.

With all the necessary information from the prior phase collected and reviewed, we undertake Discovery (For a full definition of our Discovery process please see: ??) for all requirements at a much more granular and detailed level and draft the Project Specification Document (PSD).

This document confirms the following:

- A summary of the project scope
- Confirmation of all deliverables
- Communication Plan
- Functional specification
- Technical specification
- Full project plan/GANTT chart
- Project team roles and responsibilities.

In simple terms this means we explain what we will do, how we will do it, how long it will take and who will be involved. The drafting of the PSD is subject to formal change control throughout its revision.

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Milestone b: PSD (Project Specification Document) Sign-Off.

Formal approval of the Project Specification Document is a critical dependency; the project cannot proceed to the next phase until this has been actioned. After this point, the approved PDD can be appended to the contract if appropriate.

Construction phase 3

Culminating in build sign off and Invoice milestone

The Construction phase builds upon the successful completion of the Elaboration phase and approval of the Product Specification Document.

Depending on the scale of the project, the development cycle may be repeated several times to allow a phased release of deliverables for internal and user acceptance testing, this will be managed through our normal Iterative Development cycle.

Milestone c: Construction Meeting

The aim here is to formally test and sign-off all of the newly-developed components from the cycles of the Construction Phase. Dependent on the scale of the project it may be pragmatic to have a range of these meetings to coincide with major deliverables from the phased development cycles.

Transition phase 4

Culminating in go-live sign off and Invoice milestone

This phase builds upon the successful completion of the Construction phase and leads to final population of the website, final end-to-end UAT with integrations in place and project completion.

Release candidate(s) are now prepared which, subject to approval, are packaged and delivered to the client in the agreed format (detailed within the PSD). Appropriate handover and training is then provided together with the necessary deployment.

Milestone d: Transition (Final) Sign-Off Meeting

The aim is to formally sign-off that everything has been delivered and the project has been completed satisfactorily. The project could now move into “Business as Usual” (BAU) with Affinity assuming a Support and Maintenance agreement has been negotiated and is in place.

Milestone e: Post go live support (1 month)

Affinity will as part of the overall project budget, support you post go-live with any ‘How do I’ or any bespoke development related issues that may have been missed in UAT. This does not replace a support and maintenance agreement as no security patches, updates or new bugs will be covered.

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