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Agile Charter
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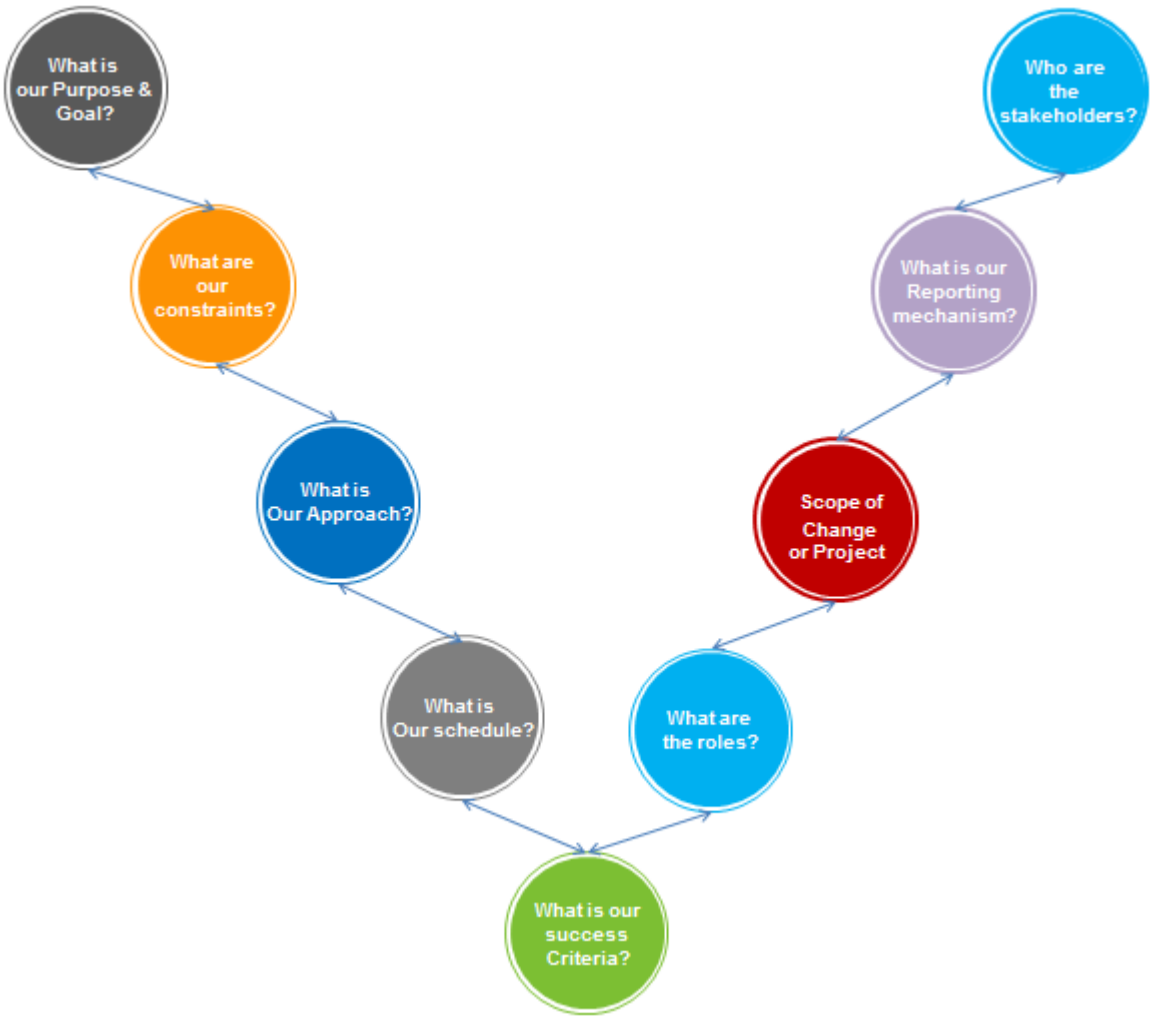

1.The Agile Charter

The Agile Charter is a document which includes details about the initiation of the project, and the scope and value prospective. The Agile Charter is initiation of the communication and helps delivery team to stay focus. Sometimes, The Agile Charter can be replaced with a business case or vice versa. A well-defined Agile Charter should possess the following characteristics:

- *Clarify the project description and business needs.*
- *Determine the outcomes sought for success declaration.*
- *Align with the organisational priorities.*
- *Act as a reference for subsequent stages of the project.*
- *Introduce naming conventions as required for traceability purpose*
- *Initial communication management to create shared understanding of value.*

As the context evolves, The Agile Charter is subjected to change. It is responsibility of the project manager or sponsor to keep the Agile Charter up to dated till it is finalised. Business Analyst Practitioner facilitates by getting the information timely and in organised way.

2. Elements of The Agile Charter

The Agile Charter is a formal document and organisations may have their own templates to fill the Charter which the project manager or sponsor completes with inputs from an agile practitioner. The Agile practitioner facilitates the sponsor or project manager by eliciting the required information and analysing the need/opportunity or problem.

2.1. Purpose or Goals

The Agile Charter describes the goal statement. This goal statement creates the shared understanding of the value among the stakeholders and starts the discussion. The purpose or goal statement should be S.M.A.R.T.

2.2. Constraints

The Agile Charter documents the constraints and risks. This is the initial assessment and as further information is uncovered, the constraints/risks may change in challenges or severity.

2.3. Approach

The Agile Charter is a strategy level document. For true Agile value realisation, it is at the strategy level that Agility is adopted. It may be possible that Agility is introduced at later stage of the project; in this case Agile is only going to be a contributory success factor. In the approach element, requirement management approach based on business strategy is also highlighted at high level. This can include the agreed levels of Agile requirements artefacts (i.e. Features > Epics > User Stories > Acceptance Criteria).

2.4. Schedule or Milestones

Project progress is tracked through functional delivery with working software being the measure of success. The Agile Charter provides initial timelines or an estimated schedule for delivery of these functions, as outlined by the Product Owner. Again this is an initial assessment and is expected to change as the initiative progresses. The Charter can refer to the Product RoadMap as a source of truth. The teams delivery speed will be assessed against the required functions so the right capacity can be allocated.

2.5. Success Criteria

Success and acceptance criteria for the change or project are outlined in the Agile Charter. This helps the team focus and be able to provide guidance to budget owners to assess the investment value continuously throughout the project lifecycle.

2.6. Roles

For any project to be successful it is important that the team knows their roles and what is expected of them. Some of the roles are transitional or temporary whereas other roles are permanent. Here the team lists out the team members names, and their role(s) on the change or project.

2.7. Scope of change or project (Context)

The scope of change or project is an important component for the Agile Charter. It helps to understand which business units within the organisation will be affected by the current initiative. It helps team to focus on the value aligned areas only to avoid waste.

Scope is also subject to change; however frequent and significant changes in scope continuously will impact the shared understanding of value and may require significant dimensioning and financial re-assessment.

Agile Practitioners may wish to conduct a context modelling exercises to assess at a high level the major impact of the proposed solution, as well as the impacted or interested parties.

2.8. Tasks of Agile Stages

Once the initial scope is identified, the analyst diverts their attention to identify and complete the tasks of the Agile stages (Discovery, Design, Develop, Deliver, and Feedback). The Agile Charter outlines the major tasks of each stage as well. This is helpful in project estimations and resource allocations. For a complex project, the tasks may be decomposed to provide much needed clarity. Major tasks which are associated with the

Agile stage including but not limited to are Prioritisation, Backlog grooming, review and retrospectives, user story mapping, backlog maintenance etc.

2.9. Reporting Mechanism

The Reporting mechanism define the reporting structures and style for the project or change. It may be possible that while the Agile Charter is being developed, reporting requirements are not available or clearly set. Business Analysis practitioners work with relevant stakeholders to define the initial reporting mechanisms which are subject to change. This provides the initial communication tool for stakeholders involved in project.

2.10. Identify Stakeholders

Stakeholders have relationship with change, need or solution. Stakeholder's commitment to the project will determine its success. The Agile Charter identifies the stakeholders involved in or impacted by/interested inso that when business case is being assessed the stakeholder commitment is also ensured.

3. Team Charter

Some organisations in addition to the Agile Charter also develop a Team Charter. A team is a group of individuals working on the same goals or objectives for a long duration within an organisation. Teams often involves people with different backgrounds, expertise, and capability. The Team Charter helps to:

Clarify the team's purpose and alignment to the business needs or goals.

Avoid internal conflicts.

Support communication within team and external to team.

Establish team expectations or one another.

Organisations should consider enterprise level HR policies in elements of the teamwork domain.

3.1. Elements of Team Charter

Below are key elements of Team Charter.

3.1.1. Team Purpose

The Team Charter helps the team to align individually and as a group with the business goals. What value can they provide as a collective? The purpose or goal statement should be S.M.A.R.T. Start with the purpose of the project or change, ensure there is a clear understanding of the problem or opportunity, and as a team work on defining an acceptable outcome for the team to commit to and the leader to present to the Product Owner.

3.1.2. Roles and Commitments

The Team Charter defines roles and commitments for the key tasks through e.g. a RACI matrix. In this way, the team will know about the dependencies and action sequence. In addition it helps a team set expectations of one another.

3.1.3. Communication Management

Throughout the lifecycle of the project, the team is often required to communicate with external and internal teams or individuals. The communication hierarchy and escalation pathways are also included in the team Charter.

Often a single point of contact is established to manage escalation/communication. This reduces the burden on other team members and allows them to focus on their delivery/roles.

3.1.4. Individual Performance

Here the team can define at an individual level what they expect from their team members, and what they need personally to operate at their best performance. This may include outside influences that need to be catered for to ensure they are available for any or all important meetings. Team members may include likes and dislikes for communication styles or collaborating so the team can adapt their interpersonal styles for one another.

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