

The Agile **Team** Tool

Together, teams uncover insights.



TEAM DATA
Visualize your team's results



TEAM TRENDS
Discover trends in team data and chart course corrections



TEAM MATURITY
Understand your agile maturity and plan actions to improve



@agileIBM

AGILE ACADEMY



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August 8, 2017
IBM Internal Use Only

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Preface

The Agile Team Tool is a web app that enables teams to track and analyze progress on their Agile Journey. The application offers a range of features from visualizing team data to understanding a team's overall Agile maturity. The Agile Team Tool can be used by all types of agile teams. This user manual will provide systematic instructions on how to use the features of the tool.

Introduction

To evolve our Agile Culture, we need to look at how we form our teams, how we distribute the work and how we measure what matters. The Agile Team Tool has been designed to help squad teams measure what matters by:

- *visualizing and sharing agile team results*
- *analyzing trends over time, and*
- *making course corrections needed to improve agile practices*

Depending on the type of work your squad performs, you will enter data about your team; team member names and roles, stories or story points delivered, number of deployments and defects, team and client satisfaction scores and your squad's agile maturity. These measures are typically entered at the end of each iteration.

The iteration results are displayed in a series of graphs in the Trends section of the Home Page showing trends from one iteration to the next. Squads will use the trended data to track their agile progress and plan actions to get better.

This user guide will provide not only how-to instructions, but guidelines for the measures included in the tool. Based on those guidelines, each squad can decide which measures best fit their type of work and stage of maturity. But, each squad is expected to track their progress, analyze their results, and continually improve their agile practices.

What are we measuring and WHY

Measure	Aggregated
Size of Team per iteration	Yes
Role gaps* – Roles needed in a team but not filled	No
Agile Maturity	Yes
Velocity – No. of units (Story Points) Planned & Delivered Throughput – No. of units (Stories/Tickets/Cards) Planned & Delivered Squads can record either Velocity OR Throughput	Yes
No of deployments per iteration Deployment = Code drop to production	Yes
Quality Measures Open Defects (bugs in production) per iteration <ul style="list-style-type: none"> <i>(Defects from previous iteration + defects found this iteration) minus defects resolved = Closing balance</i> <i>Team selected quality measures for non-delivery teams*</i> 	Yes (defects) No (non-defect)
Cycle Time of Stories (in days) <ul style="list-style-type: none"> <i>Time in WIP - Time from out of backlog to production</i> <i>Time in Backlog - Time Story added to backlog until pulled into WIP</i> 	Yes
Unit Cost per Person Day Number of Stories or Story Points Delivered per Person Day	No
Net Promotor Score (NPS) – (-100 to +100)	No
Team Satisfaction – (1-4 based on Mood Marbles)	Yes
Client Satisfaction – (1-4) collected during Showcase	Yes

*not currently in the tool

Why These Measures Matter

Tracking these measures help agile squads manage their funnel of work and continually get better by answering:

- Do I have the right number of people and the right skills on my squad? (team size, role gaps);
- Are the squad's agile practices improving? (maturity)
- Do I know the capacity of my squad so I can plan my releases and iterations? (velocity or throughput, number of deployments and defects)
- Does the funnel have the right work and is it flowing through the funnel in a reasonable time frame? (Average cycle time per story, average backlog cycle time)
- Do I understand the cost of the work so I can estimate the cost and benefit? (stories or story points per person day)
- Is my squad happy and working well together? (team satisfaction)
- Are we meeting client expectations? (client satisfaction, quality)

OBJECTIVES

After reading this document you should be able to:

1. Launch and navigate all sections of the Agile Team Tool.
2. View team information in the tool.
3. Create a new team.
4. Update an existing team.
5. Create and update iteration results for your squad team.
6. Enter an Agile Maturity Assessment for your team

Comments regarding this publication and its use should be addressed to Bruce Fouts via Lotus Notes at Bruce Fouts/Atlanta/IBM@IBMUS or via the internet at bfouts@us.ibm.com.
(Until Sep 30, 2017)

Basic Workflow of the Agile Team Tool

1. Create your team(s).
2. Add your team members and their associated team role.
3. Associate your Squad team(s) to a 'parent' or to a 'child' if creating a Parent team.
4. Add iteration information; squad teams only.
5. Track your team's progress in the Iteration trends area; make course corrections, as needed.
6. Record periodic maturity assessments for your team.
7. Track actions to improve agile maturity practices.

Launching the Agile Team Tool

All users with an IBM w3id and password can access this tool in 'Read Only' mode. Individuals listed as members of a given team have edit access for that team.

The Agile Team Tool is an internet browser application which can be accessed via the following URL: <http://ibm.biz/AgileTeamTool>

- The Agile Team Tool is Single Sign On (SSO) enabled
- Enter your IBM w3id and password if not already logged into SSO
- You will see a screen similar to the one shown on the following page. (See Figure 1)

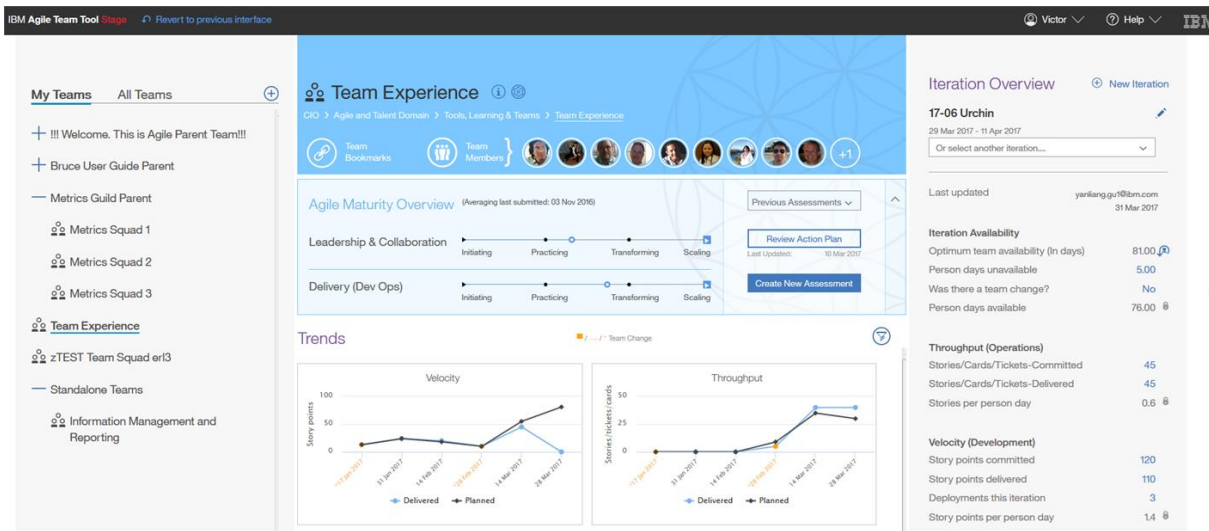





Figure 1

Navigation

When you first log into the tool, you will see that the screen is divided into three columns of information.

Left Column

- This column has two views; My Teams and All Teams.
- 'My Teams', displays only those teams you have edit access for (you are a team member or a team member on the parent team). This should be your default view if you are listed as a team member on a team in the Agile Team Tool.
- 'All Teams' displays all teams entered into the tool. This will be your default view if you are NOT listed as a team member on a team in the Agile Team Tool.
- Beside the team names you will notice a series of twisties (+) and indentions indicating 'parent' and 'child' relationships. Squad teams, which cannot have child teams, are indicated by an icon like this one, .
- You will notice a search option  in the 'All Teams' view where you can filter on part or all of a team name to quickly find a team. (figure 2)
- You will also notice a 'create new team' icon  to the far right of this column. Click this icon to create a new Squad team or Parent team.

- You will notice a light blue background when a team is selected but the team is not visible due to the section being collapsed (figure 2). A dark blue line is displayed under a selected team when the section is expanded. (figure 3)

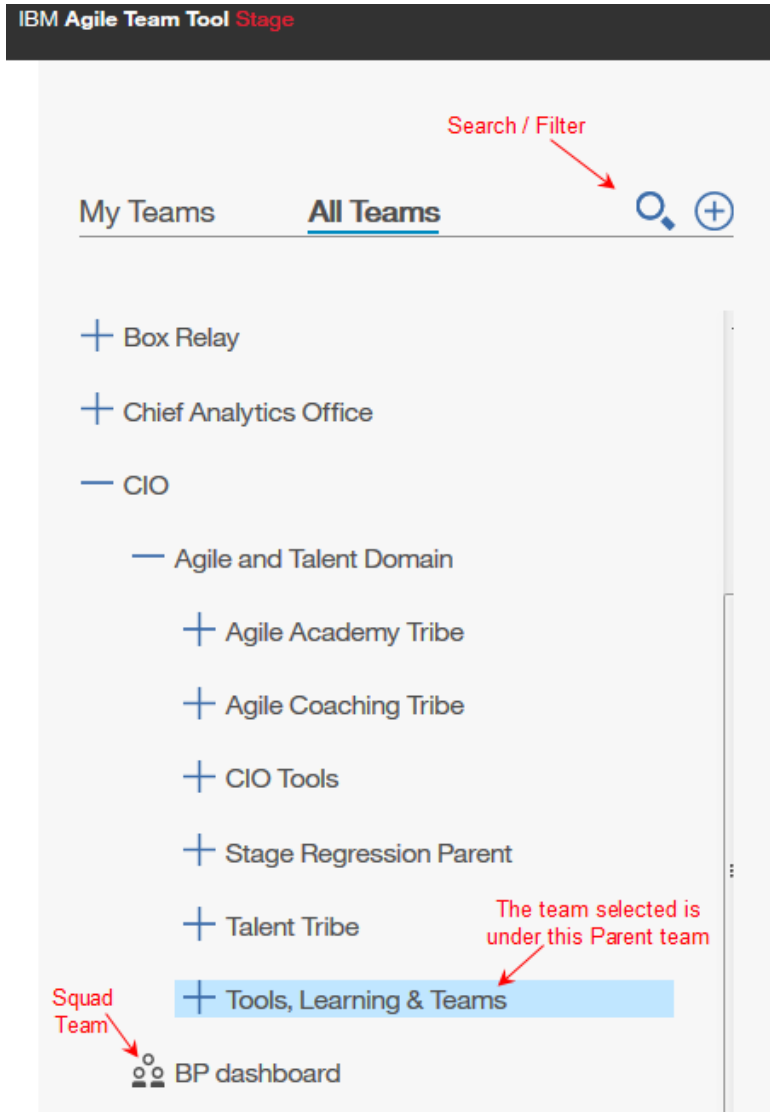


Figure 2

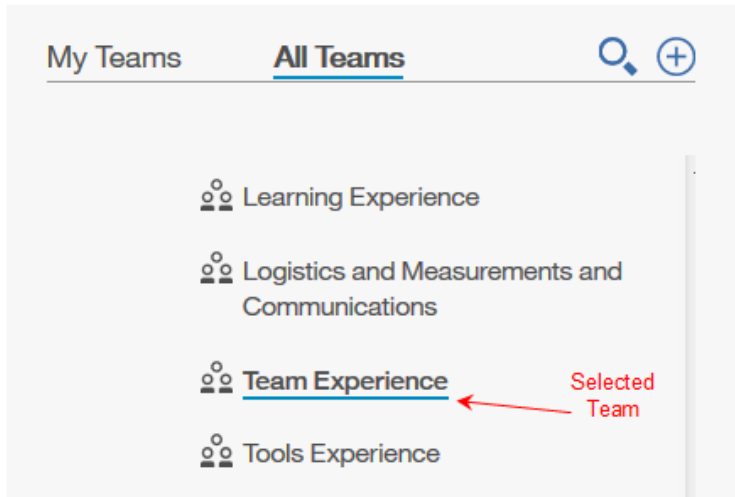


Figure 3

More detail about this section can be found under, *Creating a New Team*, on page 14.

Center Column

- The center column, to the immediate right of the team name, shows information about the selected team including:
 - Team name and parental hierarchy if it exists
 - Team Bookmarks (Important Links)
 - Team Members
 - Results of the last Maturity Assessment submitted (Squad Teams Only)
 - Iteration trends in a graphical format if iteration results have been entered for the selected squad team or an aggregate for parent teams having child teams with iteration results. For more information about these charts please refer to Appendix B – Reading the Trends Charts.
 - Maturity assessment trends in a graphical format if any assessments have been submitted

More detail about this section can be found under, *Managing Your Team*, on page 19.

Right Column

- The far-right column is used to input and display iteration results for squad teams. If a Parent team is selected in the left column, this area will be blank. (Parent teams do not enter iteration results or maturity assessments.)

More detail about this section can be found under, Creating an Iteration, on page 32.

Other selections

Additional selections can be found in the upper right hand corner of the Agile Team Tool. (See figure 4)

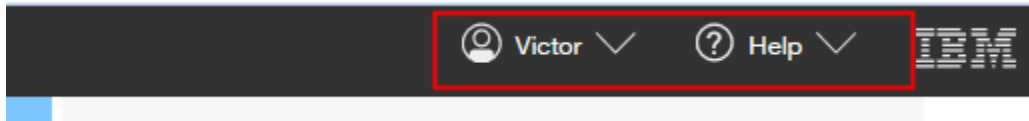
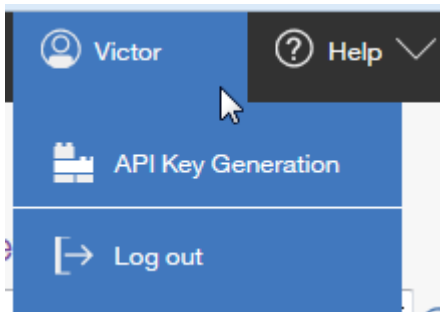


Figure 4

Your Name: This drop down provides two options.



- *Generate an API key for using an external API to send iteration results to the Agile Team Tool*
- *Logout of the Agile Team Tool*

Figure 5

Help: Here is where you will find a variety of resources to assist you with making full use of the Agile Team Tool.

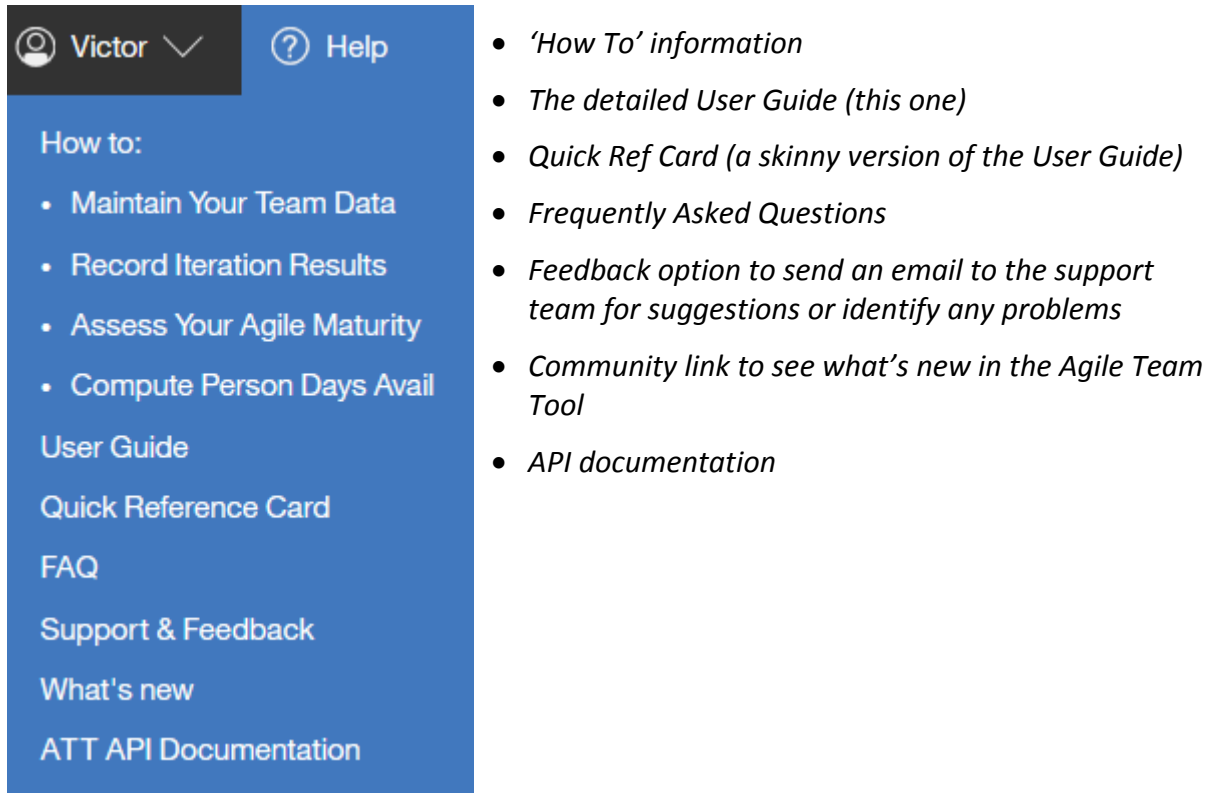


Figure 6

Support & Feedback: Offers the ability to provide direct feedback to the development team regarding any suggestions or a problem you are having with the tool.

The popup window allows you to specify the area of the tool and team name, if applicable. (See figure 7, on the next page)

Feedback and support... Please let us know! ✕

Contact Information
bfouts@us.ibm.com

Area of interest/concern

Team name

Comments*

Have a question? Checkout our [Frequently Asked Questions](#).

Figure 7


Creating a New Team

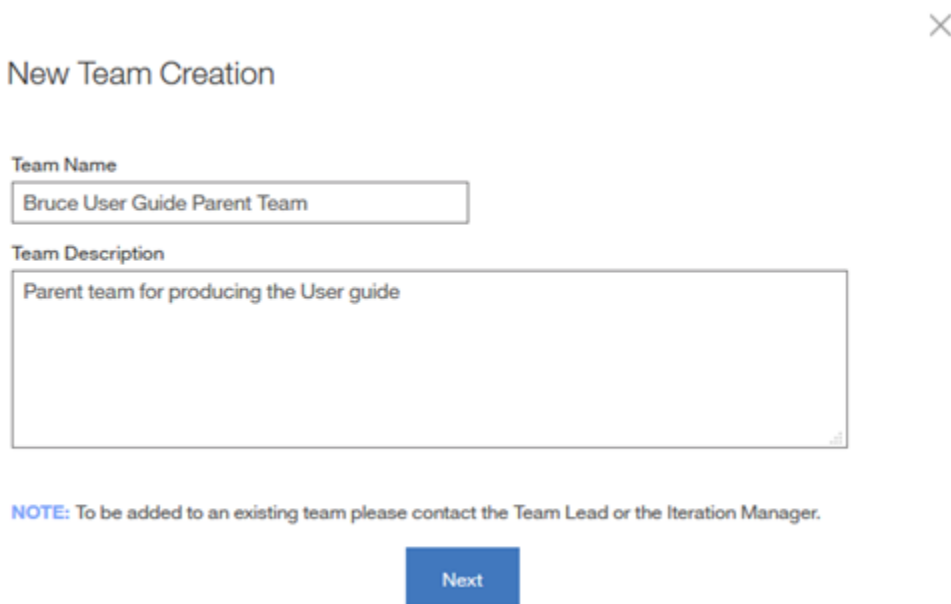
Guidelines for Creating a Team

- Any user can create a new team
- If you are listed in the team member list you will have edit access for that team.
- If you are listed in the team member list of a parent team you will have edit access for that team and all child teams under that parent
- A Squad team (Level 1) is the lowest level team in the hierarchy; it cannot have 'child' teams.
- Any team can only have one parent team.
- A parent team can have multiple child teams.

Suggestion: If creating Parent teams and child (squad) teams as part of an organizational structure for using the Agile Team Tool, I suggest creating the parent team first and then the children teams. Select the parent team as you create the child team.

Creating a Team

1. In the left column, in the 'My Teams' or 'All Teams' view, click on the 'Create New Team' icon  in the top right of this column.
2. A pop up window appears for you to enter the name of the new team and a team description as shown below in figure 8.



New Team Creation

Team Name
Bruce User Guide Parent Team

Team Description
Parent team for producing the User guide

NOTE: To be added to an existing team please contact the Team Lead or the Iteration Manager.

Next

Figure 8

3. Enter the required information and click on 'Next'. (If the team name you enter is already in use you will receive a warning message.)
4. In the next pop up, choose to create a Parent team or a Squad team as shown in figure 9 on the next page.

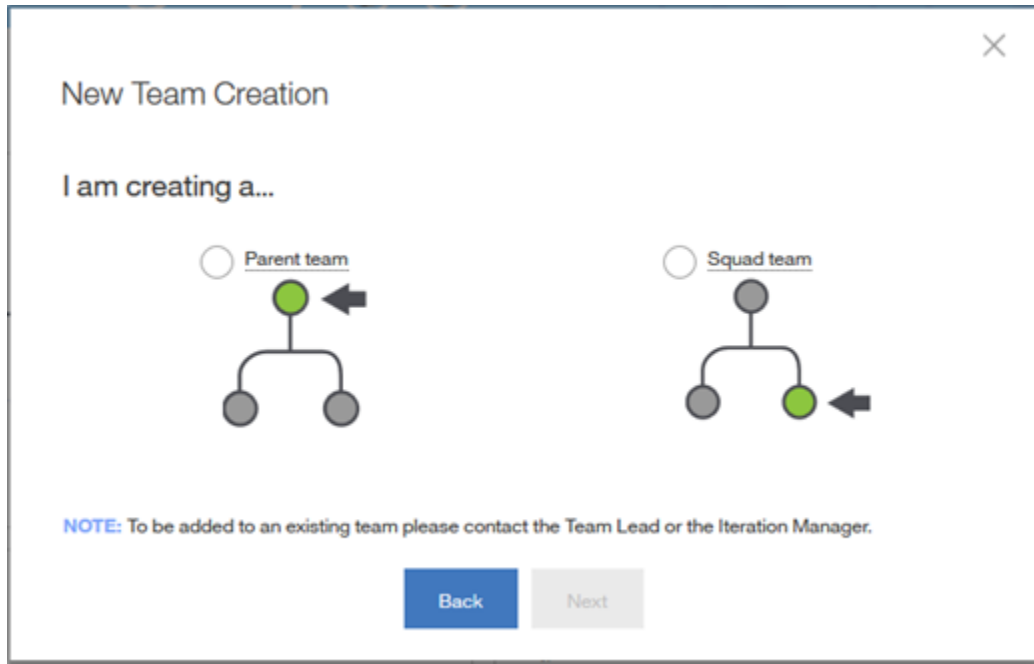


Figure 9

5. If creating a Parent team, make the appropriate selection and click on 'Next'. Go to step 7. Otherwise, go to step 6.
6. If creating a Squad team, make the appropriate selection and click on 'Next'. Go to step 20.
7. You are presented with the Parent/Child team hierarchy screen as shown in figure 10 on the next page.
8. Select a parent team from the drop-down selection. If the team you are creating will not roll up to another team or it has not yet been created you can skip this step or select the option for 'Top tier / Not Listed'.
9. Select any children teams that may roll up to the one you are creating from the drop-down selection. If the child team has not yet been created or you don't know the name you can select 'Not Listed'.
10. Click on 'Next'.

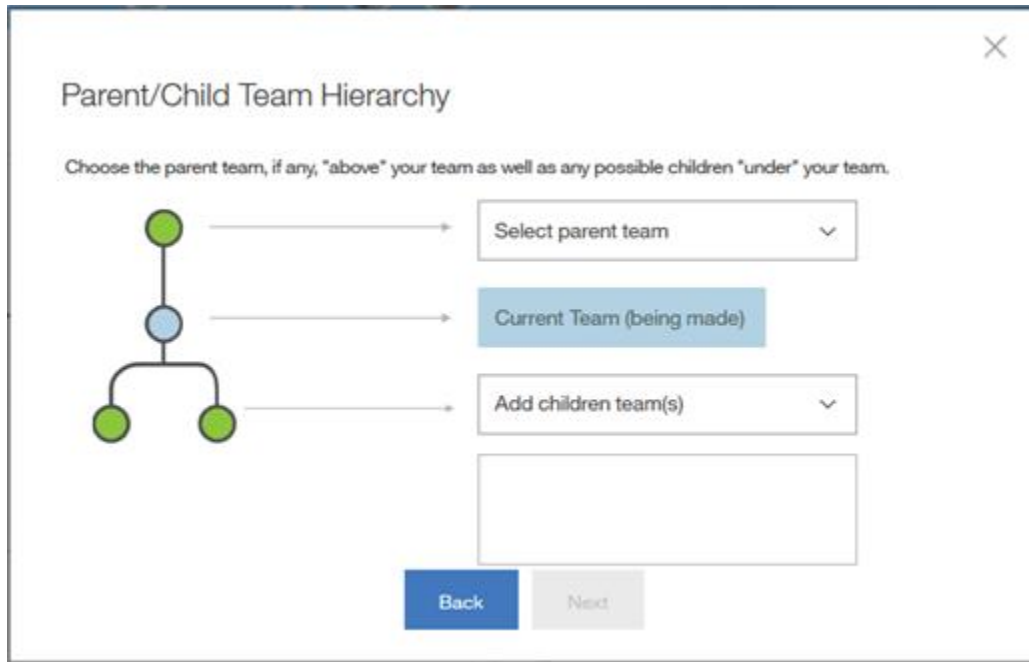


Figure 10

11. The Add Team Members screen appears as shown in figure 11 on the next page. You will notice that your name is added by default as a team member when you create the team. **You will NOT be allowed to remove your name until you have added at least one additional team member to the list. There must be at least one member on the team so that someone can make updates to this team.**
12. Enter the name(s) of the team member(s) to be added and select the person from the list provided as you type in the name. (Do not paste a name in the search box.)
13. The names are added to the list as you select them.
14. When all names have been added click on 'Next'.

Select Your Agile Team Members

To add a member, search and select them

ex. John Smith or smith@xx.ibm.com

NOTE:
You will be able to customize your team members locations, allocations and roles next.

Name	Email	Location
Victor B. Fouts	bfouts@us.ibm.com	Sandy Springs, GA, US

Back Next

Figure 11

15. The member roles and allocation screen appears as shown in figure 12.

Team Member Roles and Time Allocations

Edit the location, role and time allocation of each team member from dropdowns provided.

Name	Location	Role	Allocation	Avg. Work Week
Jean C. Lam	New Jersey, NJ, US	Select Role	100	Full Time
John Elden Revano	Somers, NY, US	Select Role	100	Full Time
Victor B. Fouts	Sandy Springs, GA, US	Iteration Manager	100	Full Time

Back Finish

Figure 12

16. Select the role for each team member and whether the member works a full time or half-time work week or some % thereof. (This selection is used to determine the number of person days the team has available for the iteration/sprint.
17. Once all team members have been updated click on 'finish'.
18. You should receive a confirmation message that you have successfully added your team. Click OK.
19. Your 'My Teams' view should refresh and display the new team you just created. (If you removed yourself from the member list it will not show in the 'My Teams' view but it should appear in the 'All Teams' view.)
20. When you indicate that a squad team is being created you are presented with the option to select a parent team using a drop-down selection as shown in figure 13 below. If the parent team has not yet been created or you don't know the name you can leave this blank. If no parent team is selected, you are basically setting this team up as a standalone team.
21. Go to steps 11-19 and complete the team setup. Repeat the process for each team you are establishing in the Agile Team Tool.

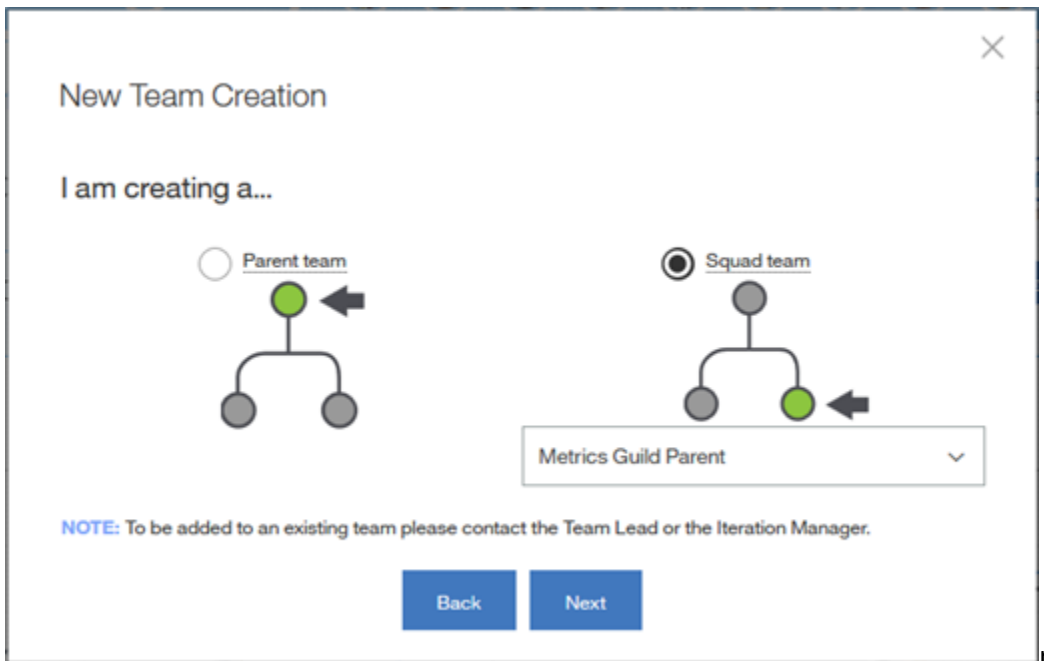


Figure 13

22. Congratulations, you have set up your team(s).

Managing your Team

1. From the team navigation column (left side), select the team you want to view/update. (Remember, you can ONLY make changes to teams that you are listed as a team member or you are a member of the parent team.)
2. Information about the selected team is displayed in the Team Information area at the top of the center column, figure 14. This figure will be referred to several times in the next few steps with references to [A] through [E].

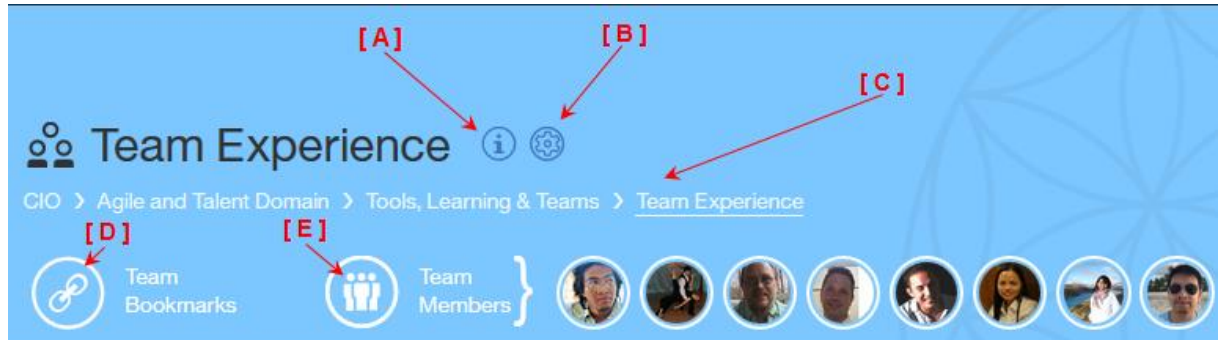


Figure 14

3. To view the team description hover your mouse pointer over the 'Team Information' icon, [A]. To change the team name or description click the 'Edit' button. Make any necessary changes and click 'Save', figure 15.

The image shows a dialog box titled 'Team Description Edit'. It has a blue header bar with a close button (X) on the right. The dialog contains two main sections: 'Team Name' and 'Team Description'. The 'Team Name' section has a text input field containing 'Team Experience'. The 'Team Description' section has a text area containing the text: 'Our team develops and supports the Agile Team Tool which is used to track IBM's progress in adopting the agile methodology.' At the bottom of the dialog, there are two buttons: 'Save' and 'Cancel'.

Figure 15

- To change the parent or child team association click on the 'Team Setup' icon, [B]. Make the necessary changes by using the appropriate drop-down selection lists and click on 'Save Changes', figure 16 (squad teams) or figure 17 (parent teams). You can also delete the team which is discussed in the next section, Deleting a Team.

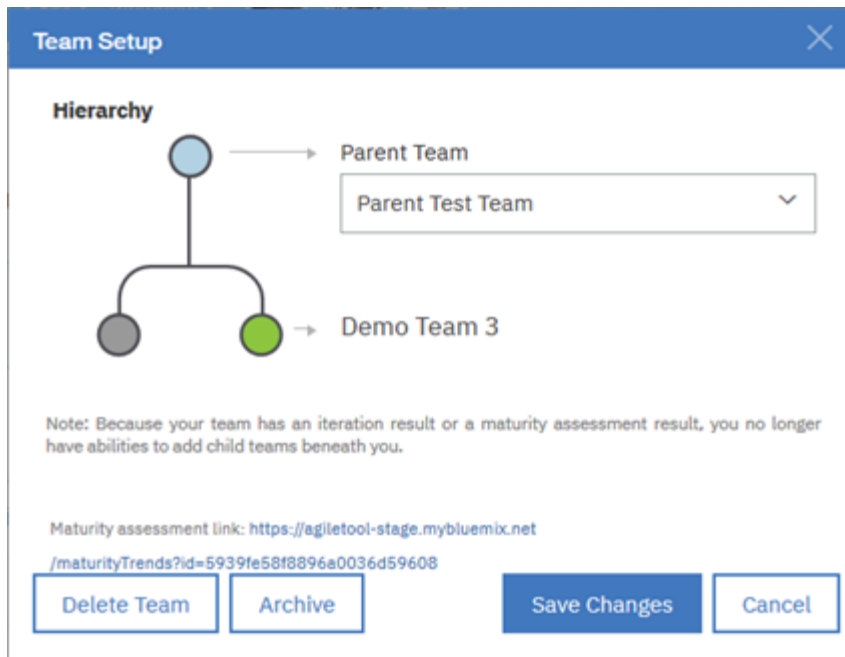


Figure 16

- It is in the Team Setup area that you add additional child teams to a parent team if the team is not already associated to another parent team. If you do not see the team you are looking for in the selection list it is either A) already associated to another parent team, or B) the team has not been created in the tool, or C) the team name may have been changed, deleted or archived.
- It is in the Team Setup area where you can also revert a parent team to a squad team using the 'Revert to a Squad Team' reset icon, figure 17. **Warning: If you revert a parent team to a squad team you will remove all existing child team associations, if they exist.**

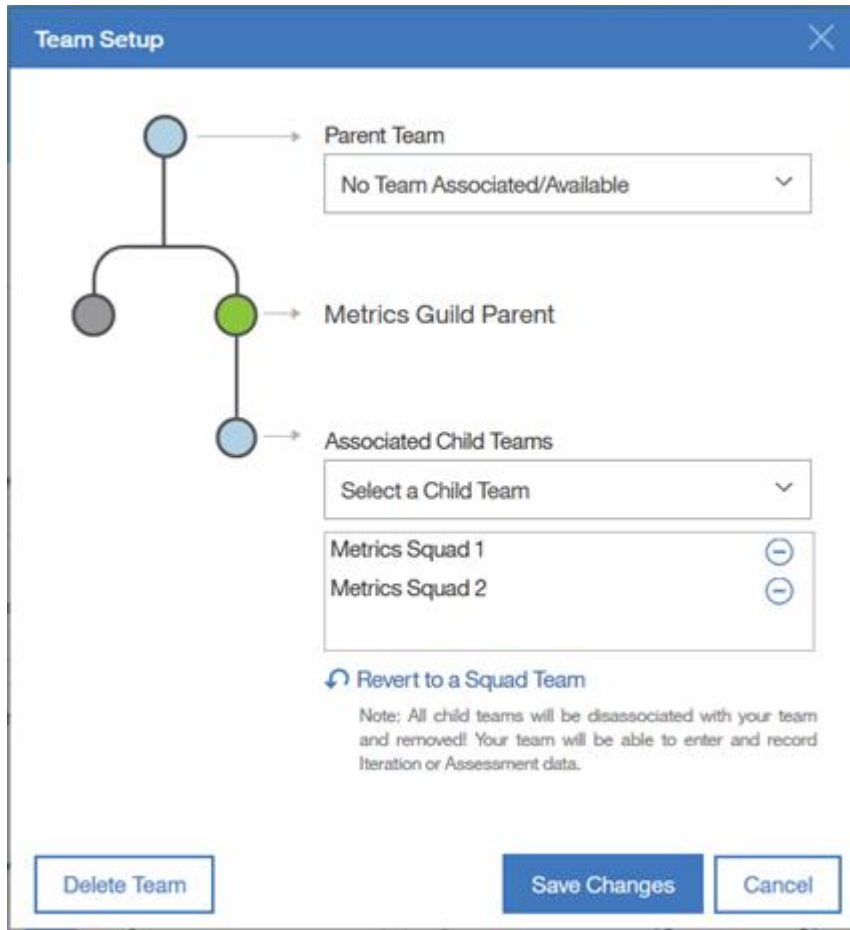


Figure 17

7. [C] The Team hierarchy is easily visible under the team name. If you change the parent team as explained in the previous bullet the update will be reflected in this hierarchy.
8. To create bookmarks, formerly called important links, hover your mouse pointer over the 'Team Bookmarks' icon, [D] , and click 'Add new link', figure 18. Select a label for the bookmark from the selection list, paste in or add the URL and click Save, figure 19. To make changes to an existing bookmark, hover over the link and click the 'Edit Bookmark' icon (pencil). Make necessary changes to the label or URL and click Save, figure 20. You can also click on the 'Remove Bookmark' icon if you want to delete the bookmark all together.

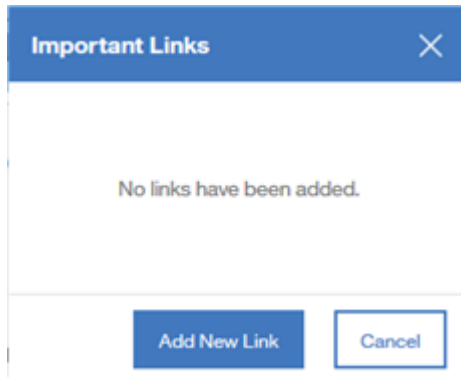


Figure 18

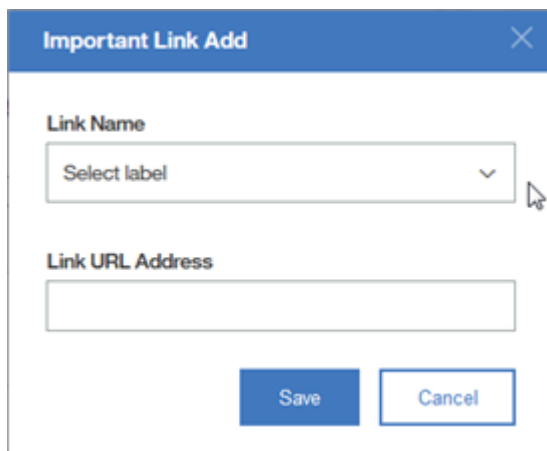


Figure 19

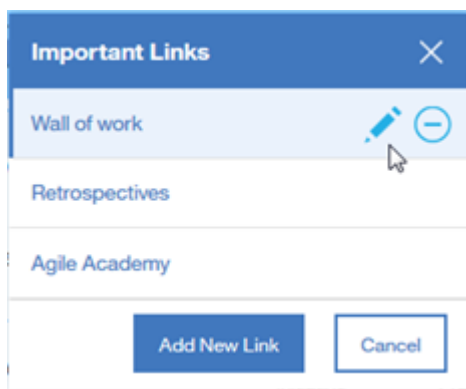


Figure 20

9. To add a team member click the 'Team Members' icon, [E] in figure 21 below and then click 'Add Team Member'. Enter the person's name, agile role, allocation %, and the *Avg work week. Click 'Add'.

*Note: The Average Work Week indicates whether the team member works a full time, a half-time work week or some % thereof, i.e. someone working 3 full days a week, 24 hours, would be represented by 60%.) The allocation %, average work week and the iteration duration is used to determine the number of person days the team has available for the iteration/sprint.

Metrics Squad 1

Metrics Guild Parent > Metrics Squad 1

Team Bookmarks Team Members

Team Details

Name	Role	Location	Allocation	Avg. work week
 M. Diane Bier diane.bier@us.ibm.com	Agile Coach	Piscataway, NJ, US	100%	Full Time
 Rob Morgan morganro@us.ibm.com	Consultant	Orlando, FL, US	100%	Full Time
 Victor B. Fouts bfouts@us.ibm.com	Iteration Manager	Sandy Springs, GA, US	100%	Full Time

Add Team Member

Figure 21

10. The team member is added to the list.

11. To update an existing team member's Agile role, Allocation % or Average work week hover your mouse pointer over, or click, the 'Team Members' icon. The team member list appears. Hover over the team member line you want to edit. Edits are performed by hovering over the field you want to modify and then making a selection from the provided list or directly entering a new value. See figure 22 below.

The screenshot shows a 'Team Details' dialog box with a table of team members. The table has columns for Name, Role, Location, Allocation, and Avg. work week. The row for Mike K. Eldred is highlighted with a red box, and a dropdown menu is open over the 'Avg. work week' field, showing options: Full Time, Full Time, Half Time, and Other.

Name	Role	Location	Allocation	Avg. work week
M. Diane Bier diane.bier@us.ibm.com	Agile Coach	Piscataway, NJ, US	100%	Full Time
Mike K. Eldred meldred@us.ibm.com	Consultant	Houston, TX, US	50%	Full Time
Rob Morgan morganro@us.ibm.com	Consultant	Orlando, FL, US	100%	Full Time
Victor B. Fouts bfouts@us.ibm.com	Iteration Manager	Sandy Springs, GA, US	100%	Full Time

Full Time ^
Full Time
Half Time
Other

Add Team Member

Figure 22

12. To remove a team member from the list use the previous steps to display and select the team member. Click on the 'Remove member' icon, figure 23 below.

The screenshot shows a single row for Victor B. Fouts. A red arrow points to a minus sign icon in a circle at the end of the row, indicating the 'Remove member' icon.

Victor B. Fouts bfouts@us.ibm.com	Iteration Manager	Sandy Springs, GA, US	100%	Full Time	⊖
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Figure 23

13. Under the team information area you can see the results of the most recently submitted maturity assessment. (Squad teams only) See figure 24 below.

- [A] Your overall result is displayed on a sliding scale from Initiating to Scaling. Information for an assessment in a draft status is not displayed here.
- [B] Previous assessments can easily be selected.
- [C] Reviewing the action plan is as easy as clicking a button.
- [D] If you have edit access you can start a new assessment.



Figure 24

14. Under the maturity overview section is the Trends area that displays iteration and maturity assessment results for squads in graphical form and enables users to link to details about those results. By selecting a 'parent' team, you can see aggregated data for the teams that roll up to that parent team.

15. A sample of the Squad Team iteration trends is shown in figure 25 on the next page.

16. If there are graphs in the Trends section that you do not want to display you can click on the 'Filter Trends' icon and deselect them from the list. This will apply to all teams you select from the team navigation area on the left-hand side. To bring the charts back, just click the icon and check any graphs you want back in your view. For now, these filter settings are only saved for the 'current' session.

17. The parent team or roll up view looks similar except the periods will be by month instead of by iteration. See figure 26.

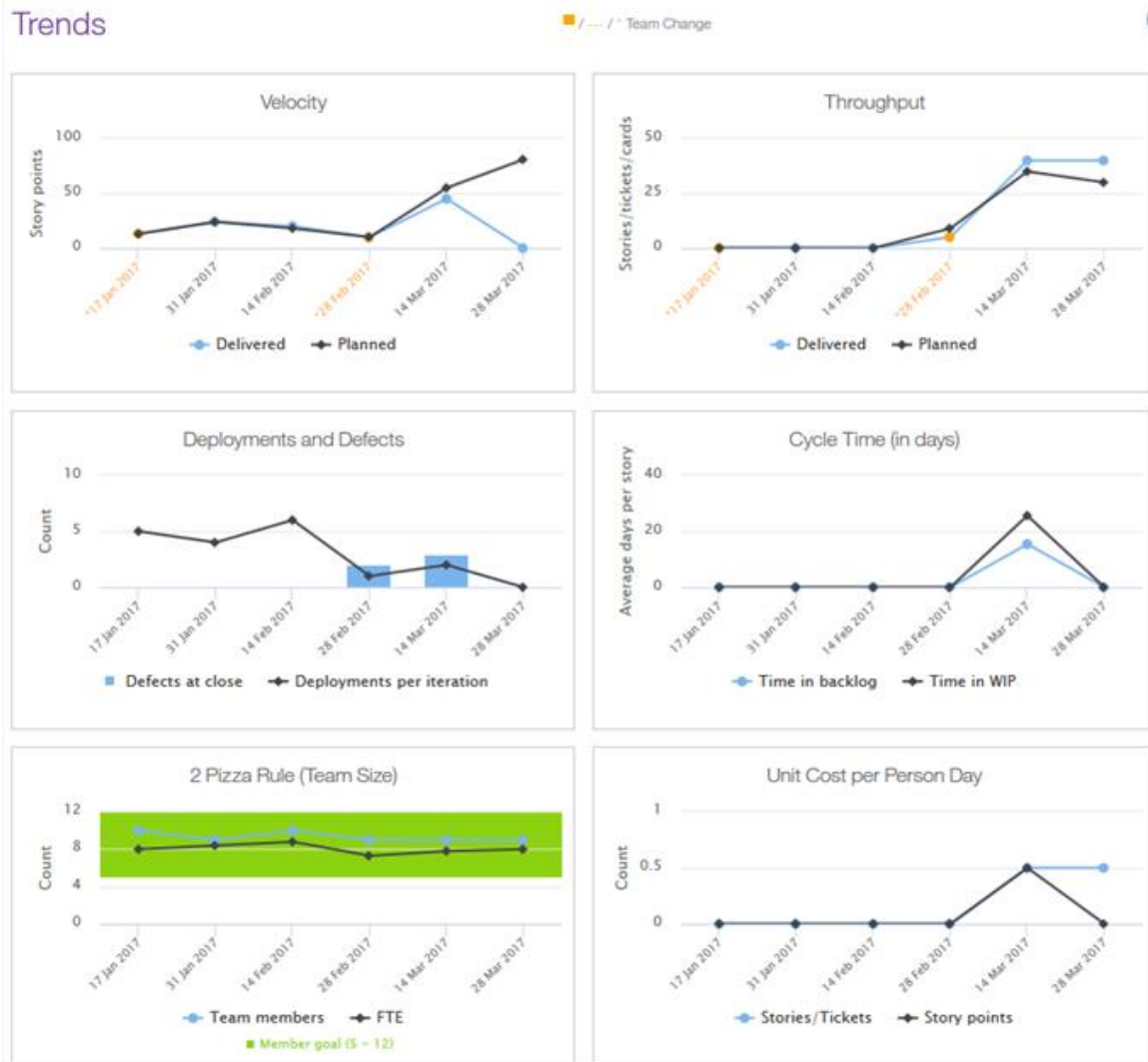


Figure 25

18. You can hover over each of the data points to see flyover information about each of the data points.
19. To see details for a specific iteration, click on the data point and the iteration information will be displayed in the Iteration Overview section in the right column. (Squad teams only.) You can also go to the Iteration Overview section and select an iteration from the drop-down selection.

20. For 'Parent Teams' containing aggregated data from the squads, the month the squad data rolls up into is determined by the Iteration End Date of each squad reporting up to that parent.



Figure 26

Deleting a Team

1. From the navigation column in the left column, locate and select the team to be deleted.
2. In the Team Information section click on the Team Setup icon, figure 27.

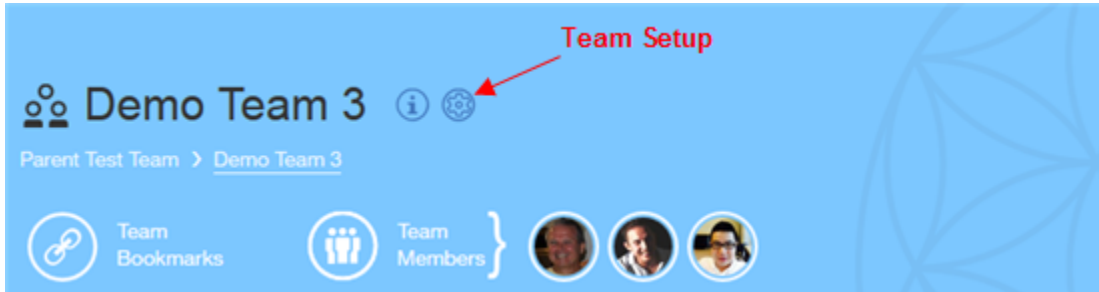


Figure 27

3. The 'Team Setup' popup appears. Click on the 'Delete Team' button, figure 28.

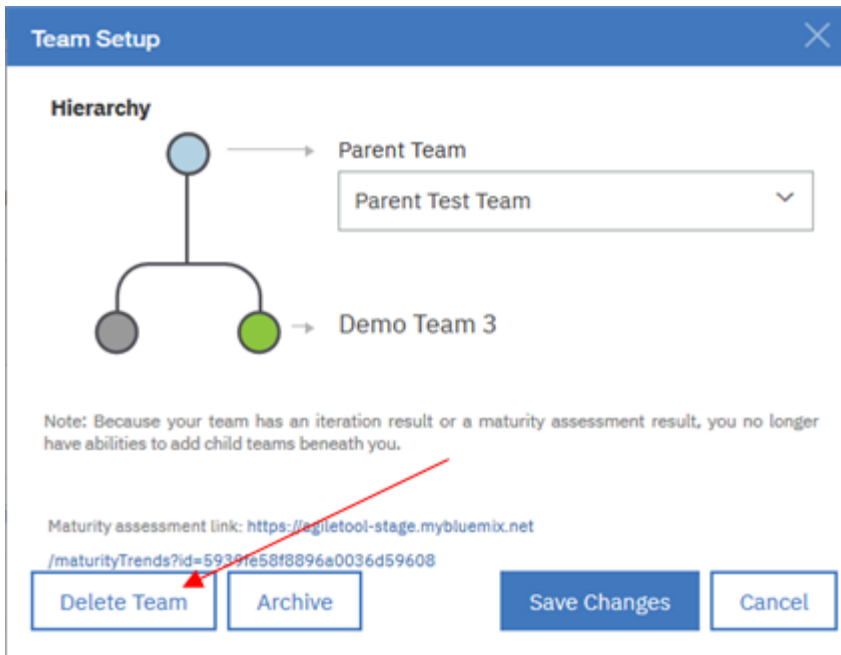


Figure 28

4. A confirmation warning appears. Select the 'Delete' button to continue with the deletion; otherwise click 'Cancel', figure 29.

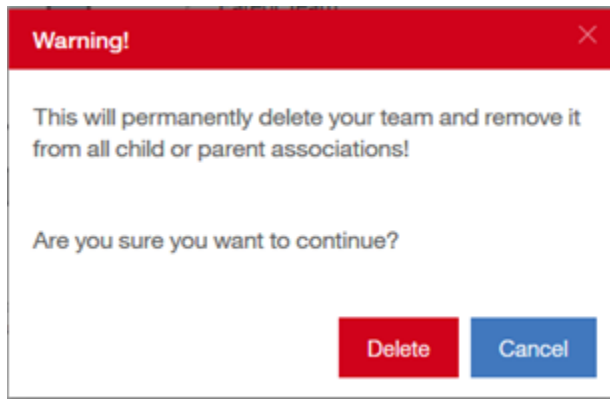


Figure 29

5. The team is deleted and removed from the team navigation list in the left column.

Archiving a Team

When a squad team is archived:

- a. It is removed from the team navigation view*
 - b. It is no longer counted in the number of squad teams under a parent as part of the 2 Pizza rule circle chart for parents*
 - c. It is no longer considered in the maturity assessment frequency chart that looks at teams not having an assessment in the last 120 days*
 - d. The metrics will continue to be a part of the parent team's rollup for iteration and maturity assessment data already submitted*
 - e. The archived squad team will still be listed as a child team when viewing the associated child teams using the Team Setup function*
1. From the navigation column in the left column, locate and select the team to be archived.
 2. In the Team Information section click on the Team Setup icon, figure 30, as shown on the next page.

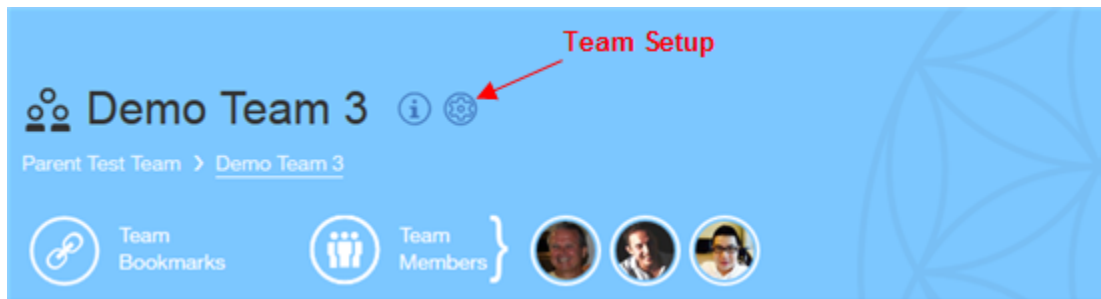


Figure 30

3. The 'Team Setup' popup appears. Click on the 'Archive' button, figure 31, as shown below.

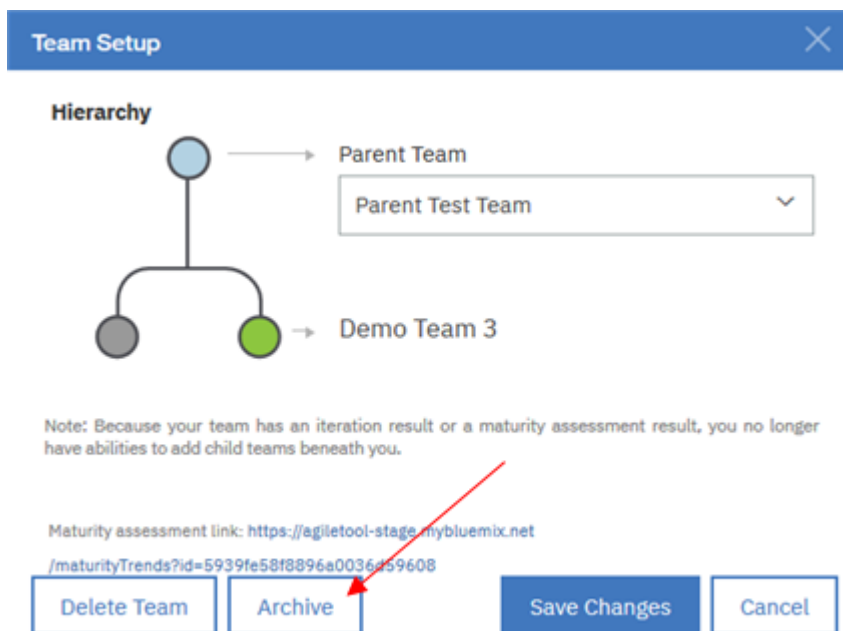


Figure 31

4. A confirmation warning appears. Select the 'Archive' button to continue; otherwise click 'Cancel', figure 32.

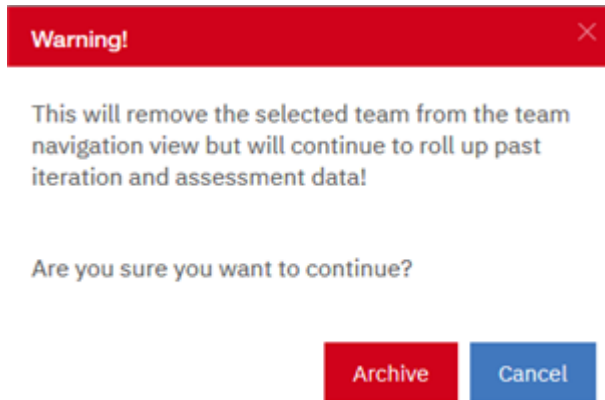


Figure 32

5. The team is archived and removed from the team navigation list in the left column.

Note: It may take several minutes for the following 'Parent team' charts to be updated due to the timing of our 'snapshot' job that updates charts every three minutes:

- a) *The 2 Pizza rule circle graph*
- b) *The 'Frequency of Maturity Assessment Evaluations' chart*

Creating an Iteration

At the end of each iteration it is expected that the Iteration Manager (IM) will create a new iteration and then enter the results of the team's most recent iteration into the Iteration Overview section. This section will focus on the creation of the iteration. To enter iteration results please see the next section, Entering Iteration Results.

1. If the team has not created at least one iteration you will see something like figure 33 in the Iteration Overview section. If you do not see figure 33 for the selected team this is NOT the team's first iteration. Go to step 6.
2. Click on 'Start the first Iteration'.

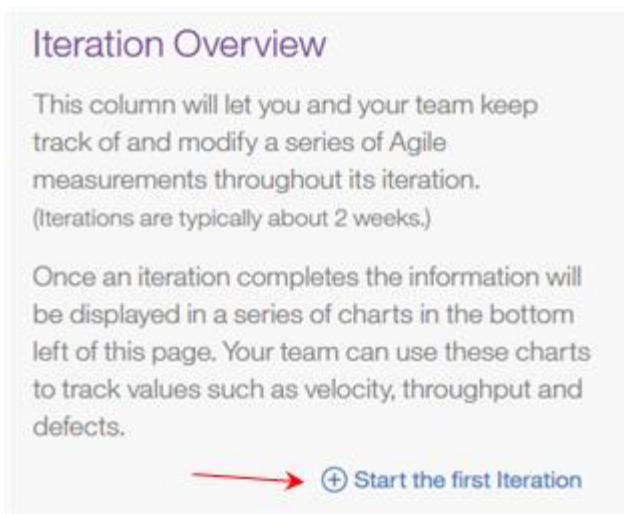


Figure 33

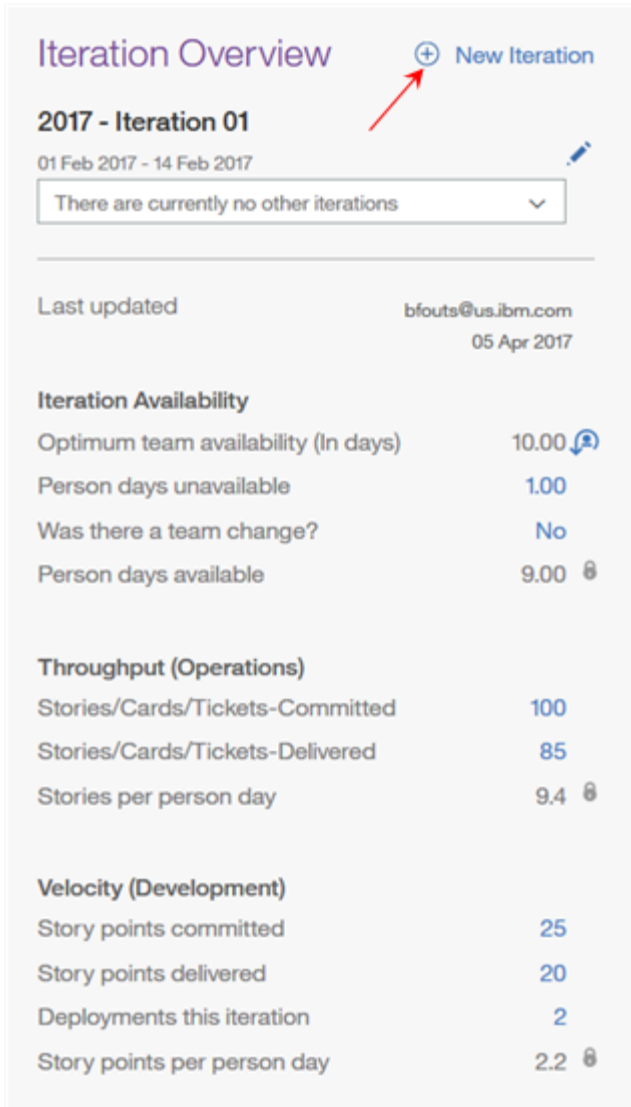
3. The 'Add New Iteration' pop up appears as shown in figure 34 on the next page.
4. Enter the name of your first iteration and select the start date for the iteration. You will notice that when you selected a start date the end date was automatically populated based on a 2-week iteration. If your team is NOT on a 2-week iteration you can select a different date. Click 'Add'. (The other boxes are not relevant for the very first iteration but they can be used for all iterations following the first one. More on this later.)
5. A confirmation window appears that you have successfully added iteration information. Click on OK.

Figure 34

6. If this is NOT the team's first iteration you will see something like figure 35 shown on the next page.
7. Click on the 'New Iteration' icon in the upper right corner.
8. The 'Add New Iteration' pop up appears, figure 36, but you will notice several boxes already checked and the start & end dates are already populated.
9. The iteration name was copied from the previous iteration with 'copy' appended on the end. You can choose to keep the copied name and make a minor change to it, i.e change the iteration number to a 2, or uncheck the 'Remember previous name' box and enter a totally different name.
10. Next, you need to decide if you want to copy the Planned or Delivered values of Stories/Cards and Story Points into your Planned numbers for this new iteration. Click the appropriate box to copy or you can elect to uncheck the boxes to not copy and enter the planned values after your planning session.
11. You may have noticed the iteration start date was populated by adding one day to the end date of the previous iteration. Verify or update your iteration start & end dates. (The default is for 2-week iterations.)
12. Click on 'Add'.

13. A confirmation window appears that you have successfully added iteration information. Click on OK.

14. Your Iteration Overview section is updated with the new information.



Iteration Overview + New Iteration

2017 - Iteration 01
01 Feb 2017 - 14 Feb 2017

There are currently no other iterations

Last updated **bfouts@us.ibm.com**
05 Apr 2017

Iteration Availability

Optimum team availability (In days)	10.00
Person days unavailable	1.00
Was there a team change?	No
Person days available	9.00

Throughput (Operations)

Stories/Cards/Tickets-Committed	100
Stories/Cards/Tickets-Delivered	85
Stories per person day	9.4

Velocity (Development)

Story points committed	25
Story points delivered	20
Deployments this iteration	2
Story points per person day	2.2

Figure 35



Add New Iteration

Iteration Name

2017 - Iteration 01 (copy)

Remember previous name

Copy into Committed from your last Iteration:

Stories/Cards (Operations) from

Committed Delivered

Story Points (Development) from

Committed Delivered

Iteration Dates

15 Feb 2017 to 28 Feb 2017

Add Cancel

Figure 36

Entering Iteration Results

The previous section focused on the creation of the iteration. In this section, we will focus on entering iteration results.

1. In the Iteration Overview section make sure you have the correct iteration selected for which you want to enter results for. Check the iteration number and the start / end dates as shown in figure 37 below.

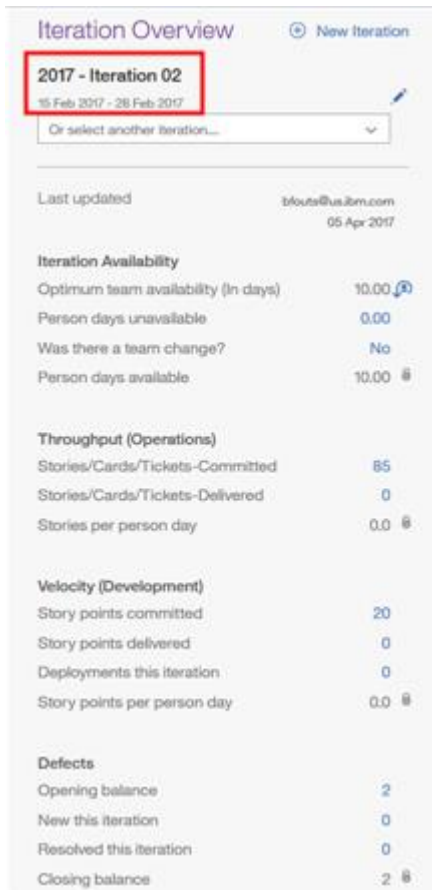



Figure 37

2. With the correct iteration selected, fill in the 'committed' fields for your team with information from your planning session. For assistance, we have provided an explanation of each field as a 'flyover'. Move your mouse pointer over each field name and informational text will appear for an explanation.

Committed Guidance:

- *If your squad tracks stories, tickets or cards, enter or update committed stories. OR*
 - *If your squad estimates story points, enter or update your committed story points.*
 - *If your squad does end to end activities (for example project and operations work), you may choose to enter stories and story points but do NOT count them twice. Use stories/cards/tickets for operations work and story points for the delivery work.*
3. At the end of the iteration, complete the remaining fields based on what was delivered by the team.

Iteration Availability:

- *As mentioned earlier in this document, we have introduced the concept of ‘Person Days’ for each iteration. We compute the optimum team availability, in days, based on the number of work days (Mon-Fri) in an iteration using the iteration Start / End Date, each team member’s Allocation % and their Full Time, Part Time status.*
- *All you have to do is enter the total number of days your team members were unavailable during the iteration as a whole. If you make changes to your team structure during the course of an iteration you can reset the Optimum team availability value by clicking on the ‘Team Reset’ icon. *
- *Indicate whether there was a Team Change or not.*
- *The ‘Person days available’ will be calculated for you.*

Throughput (Operations):

- *If your squad tracks stories / tickets / cards, enter delivered stories.*
- *The stories per person day will be calculated for you.*

Velocity (Development):

- *If your squad tracks story points, enter delivered story points.*
- *Enter the number of deployments this iteration; code promotions to the production environment.*
- *The story points per person day will be calculated for you.*

Defects:

- *The Opening balance is typically brought in from the previous iteration's 'Closing balance' but if this is your first iteration you can enter a value here that represents the number of defects your team is working to resolve*
- *Indicate the number of defects discovered in production for the current iteration.*
- *Indicate the number of defects resolved this iteration.*
- *The closing balance of defects will be calculated for you.*

Cycle Time:

- Enter the Cycle Time in WIP (Work in Progress) for this iteration. (more information on WIP cycle time is displayed when you hover over the field name as a flyover.)
- Enter the Cycle Time in Backlog for this iteration. (like WIP cycle time, more information is displayed when you hover over the field name as a flyover.)

Overall Satisfaction:

- Enter your Net Promoter Score (NPS) if you have the means to capture NPS. (more information on NPS is displayed when you hover over the field name as a flyover.)
 - Enter your Client and Team Satisfaction scores for this iteration ranging between 1.0 and 4.0
4. Enter any comments you may want to make about this iteration, i.e. why a team change, why a drop or increase in velocity, etc....

**** Note **** Your iteration results will not appear in the Trends Charts until the following criteria is met:

Iteration results (>0) are entered in at least one of the following fields:

- I. Stories delivered
- II. Story points delivered
- III. Deployments
- IV. Defects
- V. NPS Score
- VI. Client sat
- VII. Team sat

AND the iteration end date is > or = current date

Creating a New Maturity Assessment

Depending on the type of work your team does (Operations or Project) your team will take one of two assessments for Leadership and Collaboration and if your team delivers software you should take the Delivery portion of the assessment. The delivery portion is sometimes referred to as the DevOps assessment.

1. Select your team from the team navigation list in the left column.
2. If you are creating the very first assessment for your team, the center column of your home page will look similar to that shown in figure 38 below.
3. Click on 'Let's get started'. If this is NOT the very first assessment click on the 'Create New Assessment' button.

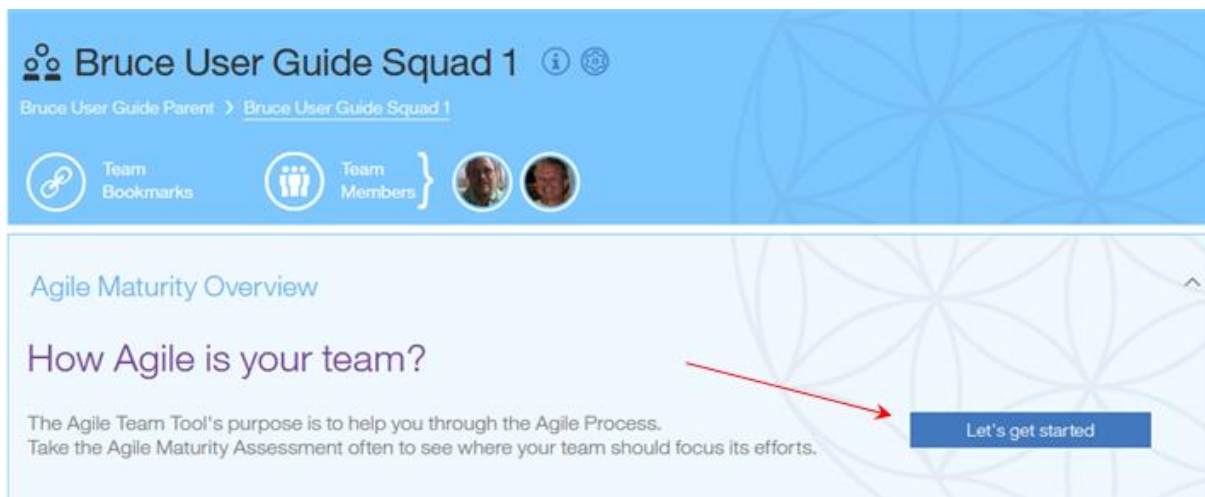


Figure 38

4. You will be presented with a pop up asking you to identify the type of work your team does. See figure 39 on the next page.
5. Read the explanation for each question and make the appropriate selection for your team.
6. Click on 'Continue'.

New Maturity Assessment Setup ✕

What is your team's work type?

Project Delivery ▾

Operations teams support a repeatable process that delivers value to the customer. Unlike a project, it normally has no definite start and end date. Operation examples include recruitment, budgeting, call centers, supply chain and software operations.

Does your team deliver software

Yes ▾ Answering yes will add the optional DevOps software delivery practices.

Continue **Cancel**

Figure 39

7. The agile maturity assessment appears as a pop up window. See figure 40 on the next page.
8. You will notice in the top right corner the values you selected in previous steps regarding the type of work your team does and if your team delivers software. These values can be changed here if they are not correct.
9. You might notice the submission date has an override function. If you are entering information for an assessment taken prior to using the Agile Team Tool and you are entering data for historical and trending purposes, you can click on 'override' and select the actual date your team previously did the assessment.
10. You will also notice that the Agile Principles are expanded but the Agile Practices are collapsed.

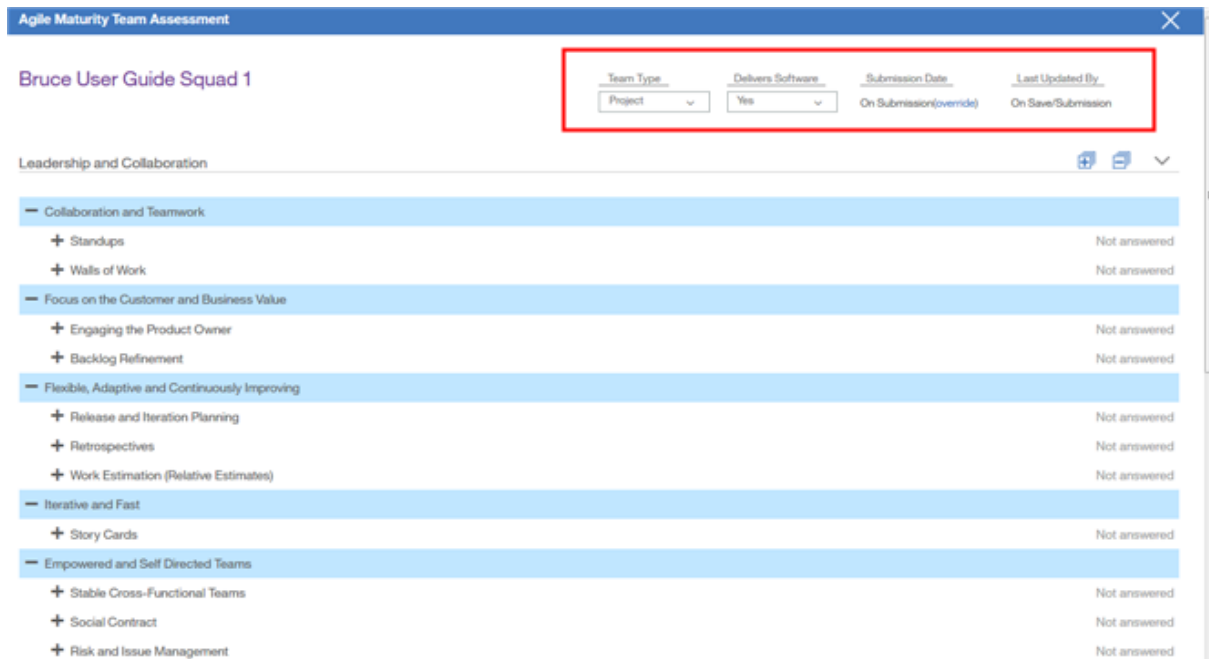


Figure 40

11. Expand each practice as you scroll down the list indicating the maturity level of your team for each practice by clicking the appropriate radio button in the 'Current' column. See figure 41 below.

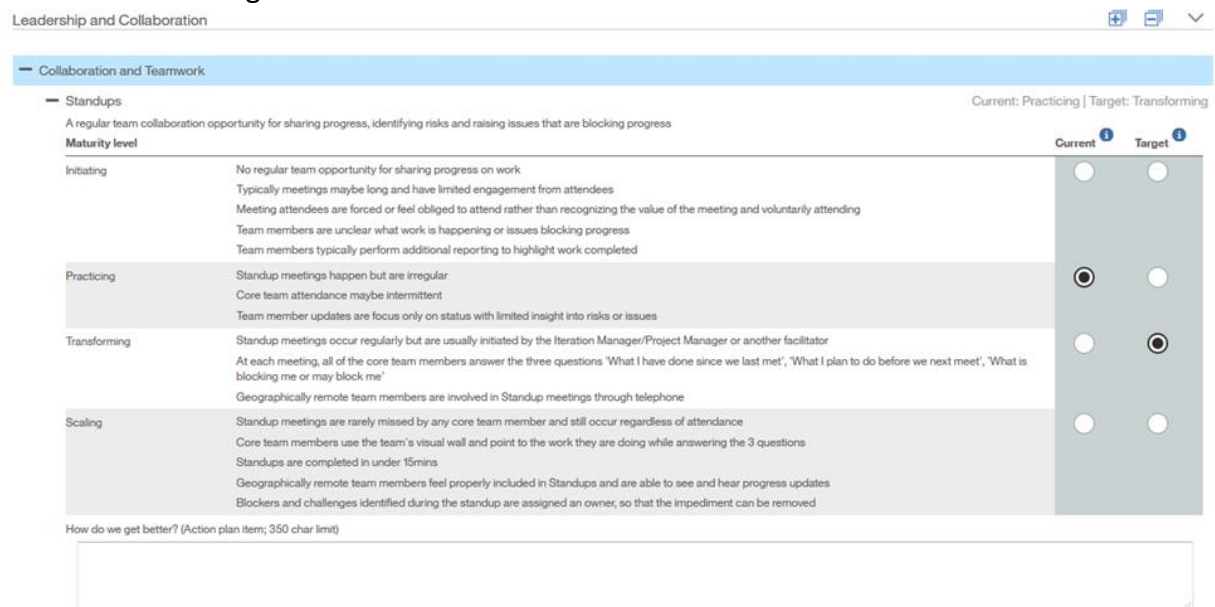


Figure 41

12. Once you have selected your team’s current maturity level, select the appropriate radio button under the ‘Target’ column to indicate the level that the team wants to attain by the next assessment cycle. See Figure 41 above. (It is recommended that you schedule assessments every 90 days so the team can improve their maturity incrementally).
13. For each practice, you have the option to enter an action plan item on how you can get better. At a minimum, you should enter action items for those practices that are targeted for improvement.
14. As you proceed through the assessment you can easily see which practices you have responded to and those still left unanswered. See figure 42 below.

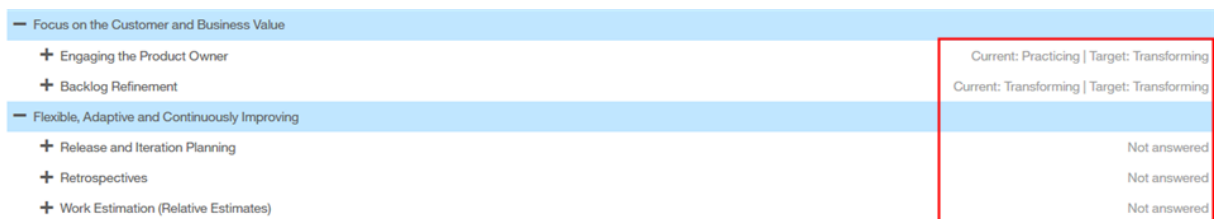


Figure 42

15. If you are unable to complete the assessment click on the ‘Save as draft’ button at the bottom of the window at any time and return later to complete your assessment. (You may have to scroll down to see the button.) To return to an incomplete assessment click on the ‘Continue Assessment’ button in the Agile Maturity Overview section on the main page, see figure 43 below.

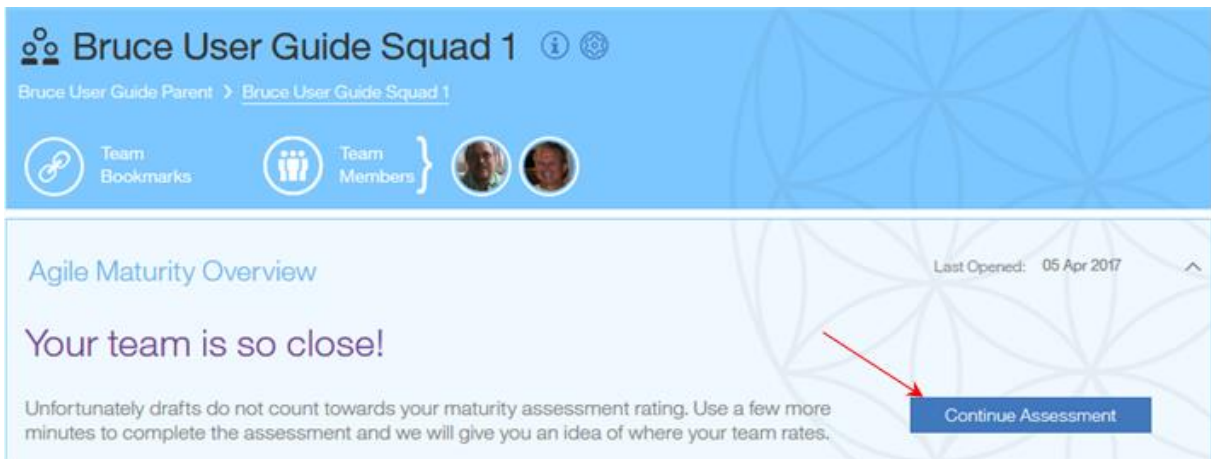


Figure 43

16. Complete all sections and click the 'Submit' button when finished. **Once submitted you can NOT make changes to any of the 'Current' and 'Target' values. You can only make updates to the Action Plan once submitted.**
17. Once submitted, the Agile Maturity Overview section will be updated with your overall assessment results. See figure 44 below. The small red box reflects the date your assessment was submitted or the override date selected for this assessment.

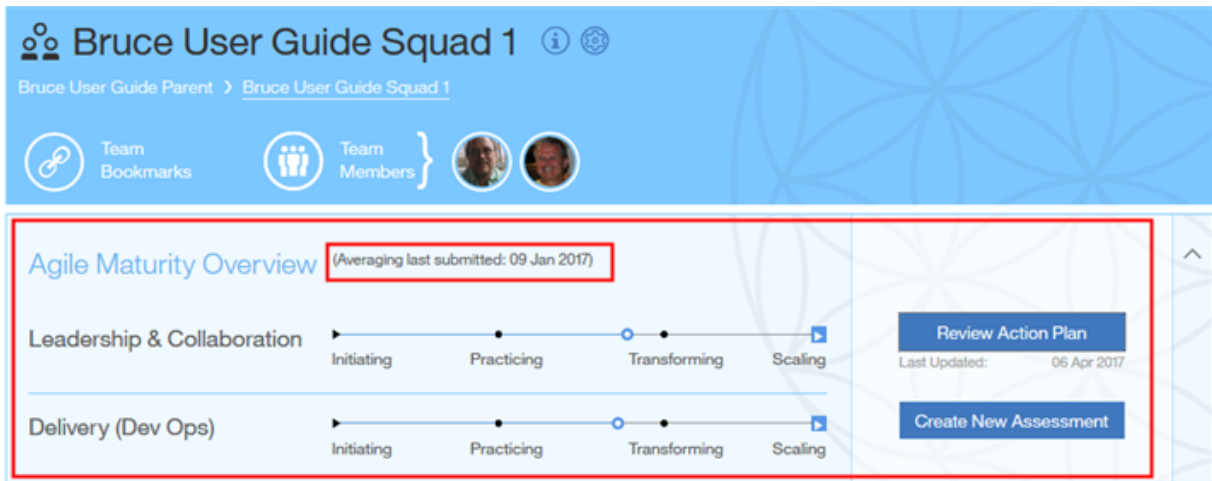


Figure 44

Viewing your Agile Maturity Assessment Summary

1. To review your Action Plan at any time, click the 'Review Action Plan' button. You will be presented with the 'Agile Maturity Team Summary' screen. Your action plan items will be at the bottom of the page. See figure 45 below.
2. *(This view is available once you submit an assessment). You can add additional line items to the action plan by selecting the 'Add Action Plan' button if you wish.*
3. Here you can track your progress and close them as they are completed.
4. Key metrics can be defined and recorded. For example, the team may want to get their standups duration to 15 minutes or less.
5. Review dates for the actions items can be set.
6. Progress can be recorded in the Progress Summary field.
7. Status is tracked in the Status field, i.e. Open, In Progress, Closed.

The screenshot displays the 'Agile Maturity Team Summary' interface. At the top, there is a blue header with a close button (X). Below the header, the team name 'Bruce User Guide Squad 1' is shown on the left, and key metrics are listed on the right: Team Type (Project), Delivers Software (Yes), Submission Date (10 Jan 2017), and Last Updated By (bfouts@us.ibm.com, 06 Apr 2017). The main content area is divided into sections: 'Leadership and Collaboration' and 'Delivery and DevOps', both with collapse arrows. The 'Action Plan' section is expanded and highlighted with a red border. It contains a table with the following data:

Related Practice	Principle	Current	Target	How do we get better?	Progress Summary	Key Metric	Review Date	Status
Standups	Collaboration and Teamwork	2	3	Pick a better time for the standup so that all team members can attend.			override	Open

Below the table is an 'Add Action Item' button. At the bottom right of the screen, there are two buttons: 'Save Action Plan' and 'Reset Changes'.

Figure 45

8. To view the summary results of your assessment, expand the collapsed section for the area you want to view, i.e. Leadership & Collaboration, Delivery & DevOps, etc.
9. Here you will see the overall summary for the 'Current' and 'Target' values submitted for this assessment as well as values for each agile practice. Trends are charted on the right side as more assessments are submitted. See figure 46 on the next page.



Bruce User Guide Squad 1

Team Type

Delivers Software

Submission Date

Last Updated By

Project

Yes

10 Jan 2017

bfouts@us.ibm.com
(06 Apr 2017)

Leadership and Collaboration



Practice	Current	Target
Overall	2.5	3.0
Standups	2	3
Walls of Work	2	3
Engaging the Product Owner	2	3
Backlog Refinement	3	3
Release and Iteration Planning	2	3
Retrospectives	3	3
Work Estimation (Relative Estimates)	2	3
Story Cards	3	3
Stable Cross-Functional Teams	2	3
Social Contract	3	3
Risk and Issue Management	3	3



Figure 46

10. By default, the Overall summary values are charted on the line graph.
11. If you want to view the trend for any of the individual practices click on the Practice name. The graph on the right displays the trend for the selected practice.
12. To return to the home page close the summary window using the 'X' in the upper right corner.

View a Previously Submitted Maturity Assessment

1. Select the team you want to view from the team navigation list in the left column of the home page.
2. In the Agile Maturity Overview section, select an assessment date from the drop-down list using the 'All Assessments' button. See figure 47 below.

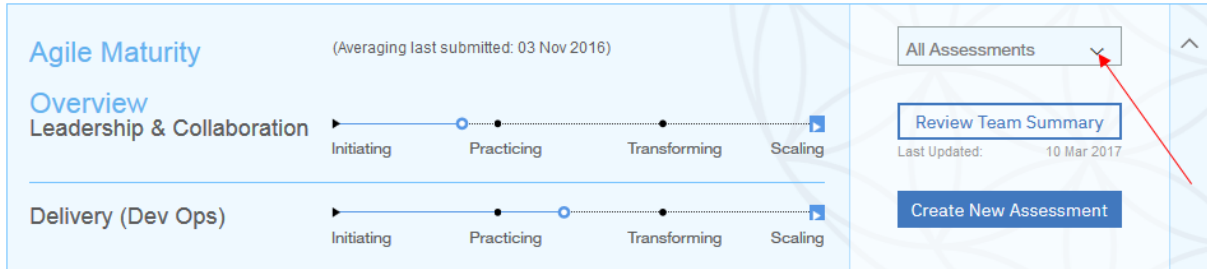


Figure 47

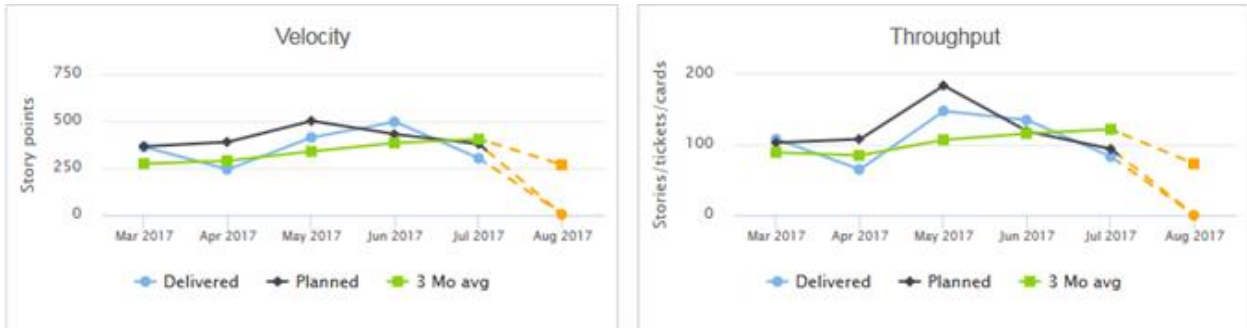
3. The linear scale chart is updated with the overall assessment values for the selected assessment.
4. Click on the 'Review Team Summary' button.
5. You are presented with the 'Agile Maturity Team Summary' screen.
6. All sections are expanded by default.
7. Scroll down to view the overall summary for the 'Current' and 'Target' values submitted for this assessment as well as values for each agile practice. Trends are charted on the right side as more assessments are submitted. See figure 46 on the previous page.
8. Click on the practice name to see the trends for that practice.
9. At the bottom, you will see action plan items the team agreed to work on.
10. To return to the main screen, close the summary window using the 'X' in the upper right corner.

Appendix A – Notes

- A Squad Team is the lowest level team in the Agile Team Tool hierarchy, i.e. Level 1
- Squads normally report up to a Tribe (Level 2), but it can also be directly associated to a Level 3 or Level 4 team.
- Tribes report up to a Sub-Domain; Level 3 (CIO statement).
- Sub-Domains report up to a Domain; Level 4 (CIO statement).
- Team members can be on multiple teams.
- A person can be on the team member list more than once, i.e. two different roles at different allocation % but will only be counted once in the team member count.
 - Individuals added to the team member list at 0% allocation are NOT counted in the 2-Pizza rule chart as part of the 'core team'.
- A parent team can have multiple teams underneath it but a team (squad or parent) can have ONLY one parent.

Appendix B – Reading the Trends Charts

Parent Teams – Displays the current month minus 5 using 'Iteration End Date' for the reporting period



- Velocity and Throughput graphs are displaying a straight rollup of story points (Velocity) or number of stories (Throughput) for all squad teams rolling up to the parent team through the parent team hierarchy. We display the Planned number as well as what was reported as Delivered.
- The green line shows a rolling 3-month average of the Delivered. In the example above, Jun 2017 is an average of April, May, and June.

Hint: You can click on any of the legend labels, i.e. Planned, and that line is removed from the chart so that you can more easily see the remaining 2 lines. To bring it back just click on the legend label again. (You can do this on any of the charts in the Agile Team Tool.)



- Deployments and Defects, like Velocity and Throughput, is a straight rollup of the number of Deployments and the closing balance of Defects.
 - Deployments are considered code drops to the production environment.
 - Defects represents the number of all open defects in the production environment at the end of the reporting period. For Defects, we ONLY look at a squad team's last iteration for the reporting period for rolling up the closing

balance. For squads with two iterations in the reporting period this eliminates counting the same defect twice.

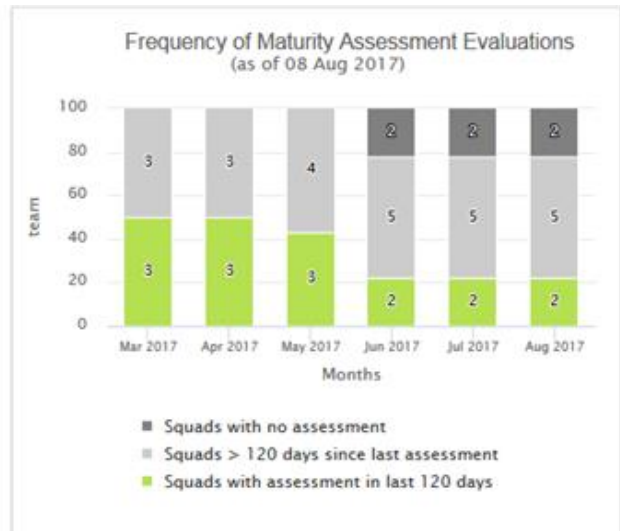
- Cycle time reflects the time, measured in days, our stories are either in Backlog or in Work in Progress. Some squads are not computing and thus not reporting cycle time yet. For this measurement, we only consider those values > 0 in the calculation.
 - There has been much discussion on when the clock starts or stops for each of these measurements. Some think weekends and holidays should not be included in the calculation while others think they should. The 'help-aid' available in the Agile Team Tool help section (Excel spreadsheet) only uses 'workdays' (Mon – Fri) as part of the calculation but this could change with new direction from the office of the CIO.



- Squad Team Size per Iteration reflects how often iterations are conducted with the right size teams.
 - Currently, we are considering 5-12 team members as the right size team for agile adoption. This chart shows you the % of iterations reported having the right size team at the time it was reported. Ideally, you would want all iterations (100%) conducted with teams of the right size.
- The 2-Pizza Rule circle chart gives management a view of how many squad teams report up to this parent team and whether they are the right size. In the example above, this parent team has 9 squad teams of which 6 are the right size.
 - This chart is not based on any reporting period. It reflects the team's size at the time you displayed the information in the Agile Team Tool.



- Client and Team Satisfaction is a rolled-up average of the Client and Team satisfaction scores reported by each of the squads for the reporting period. Since these are not required fields, we only consider those values > 0 in the calculation.



- Maturity Assessment Trends Per Month displays the average Overall Current Score for the most recent assessment taken by the squad teams. The key take-away here is 'the most recent assessment'. Because assessments are normally taken every 90-120 days it is possible that you might not see much fluctuation for a couple of months at a time.
 - Keep in mind that we have 3 assessment sections; Two for Leadership & Collaboration (Operations & Project teams) and one for Delivery / Dev Ops.
 - Remember, you can toggle the display of the graphed lines if they are difficult to differentiate.
- Frequency of Maturity Assessment Evaluations lets management know how long it has been since the squads did a maturity assessment. In the example above, only 2 teams have done an assessment in the last 120 days and 2 teams have not done an assessment at all.



- The maturity assessment ‘spider charts’ show the current overall average score for each of the foundational practices for assessments submitted for the current quarter minus 3 so that you have a full year of history.
 - It is possible for a parent team to have spider charts for all 3 assessments or as few as one or two depending on how many operations or project squads roll up into the parent team.
 - Depending on how long your teams have been using the Agile Team Tool it is possible to not have data to display as far back as the charts allow.



- The DevOps Practices spider chart only appears when squad teams indicate they deliver software

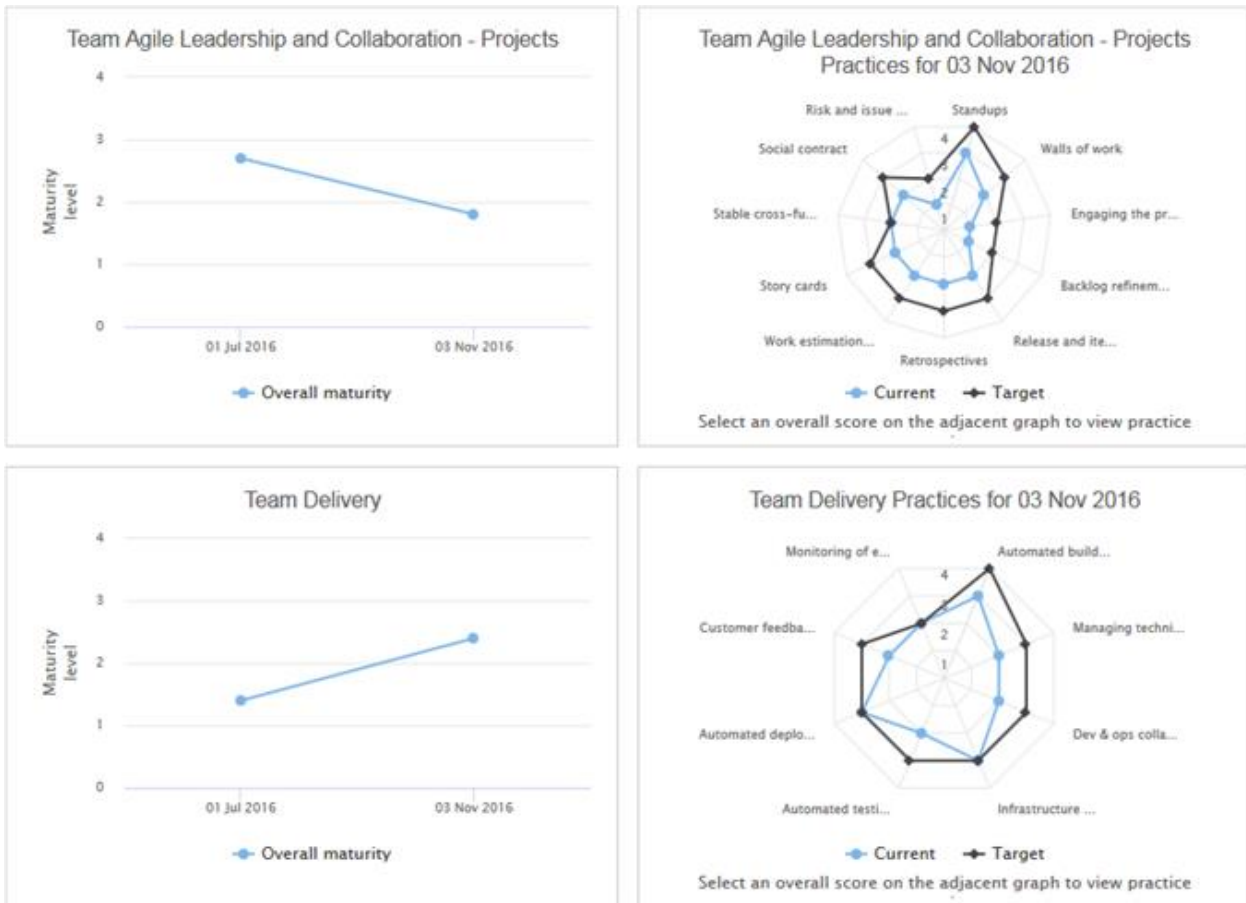
Squad Teams – Display 6 iterations of data

The first four charts (Velocity, Throughput, Deployments & Defects, and Cycle Time) are the same as for parent teams except we display the 6 most recent completed iterations.



- The 2 Pizza rule chart shows you the team member size in relation to the FTE (Full Time Equivalent).
 - The team member count is calculated using the unique employee serial number (CNUM) for team members having an allocation % > 0. Members added to the team at 0% allocation such as first line managers or as an agile coach are not counted for this chart.
 - A team member added twice with two different roles and allocation % is still only counted once... not twice.
 - The allocation % is used to determine the FTE.
 - The idea for this chart is to have small dedicated teams. If you have 12 team members and they are all at 50% allocation it would show an FTE of 6 which is not the best scenario.
- Stories / Story Points per Person reflects the number of stories/story points delivered per person day during the iteration. We use the allocation % in conjunction with the length of the iteration and whether the team member works a full-time schedule to determine the maximum number of person days the iteration has. The iteration manager can enter the number of unavailable days for vacation, illness, education, etc into the Agile Team Tool and tool will calculate the number of actual person days available and then use the number of stories delivered to calculate the stories per person day.

- Client & Team Satisfaction – Same as for the parent team but it’s only at the squad level.
- NPS score reflects the Net Promoter Score reported by the squad team if they have the ability to capture the NPS. The NPS can be from +100 to -100. (This not currently rolled up.)



- Squad teams can have one or more of the maturity assessment charts depending on whether they deliver software or changed from an Operations squad to a Project squad. These charts represent the current Overall maturity for the last six assessments submitted if they exist in the Agile Team Tool.
 - If you click on the data point for one of the assessment dates in the chart on the left, the spider chart will reflect the current and target values for that assessed practice in the chart on the right.

Appendix C – Agile Role Categories

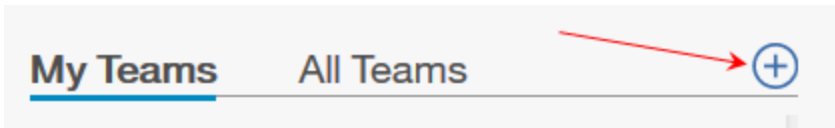
- *Agile Coach*
- *Analyst*
 - *Business Analyst*
 - *Business Information Management Specialist*
 - *Data Specialist*
 - *Designer*
- *Architect*
 - *Application Architect*
 - *Enterprise Architect*
 - *Security Architect*
- *Consultant*
 - *Business Design Consultant*
 - *IBM Field Enablement Professional*
 - *IT Management Consultant*
 - *Process Excellence & Transformation Professional*
 - *Security Consultant*
 - *Security Specialist*
- *DBA*
 - *Application Database Administrator*
- *Developer*
 - *Application Developer*
 - *Portals & Collaboration Solutions Specialist*
- *Infrastructure*
 - *Infrastructure Architect*
 - *Systems Management Specialist*
- *Manager*
 - *Business Area Manager*
 - *People Manager*
- *Operations and Support*
 - *Application Focal Point*
 - *Audit & Compliance Focal*
 - *Business Operations Professional*
 - *Finance Coordinator*
 - *Financial Analyst*
 - *Measurements & Reporting Analyst*
 - *Support Center Representative*
- *Program & Project Mgmt*
 - *Business Programs Manager*
 - *Delivery Project Executive*
 - *Project Manager*
 - *Technical Team Leader*
- *Tester*
 - *Test Specialist*
- *Product Owner*
- *Iteration Manager*

Appendix D – Top Things to Know About the New User Interface

(Don't miss #10)

1) We eliminated the multiple tabs across the top of the page. All primary activities can be done on a single page through a series of pop-up windows.

2) To create a new team, use the 'Create new Team' icon in the team navigation section in the left column.

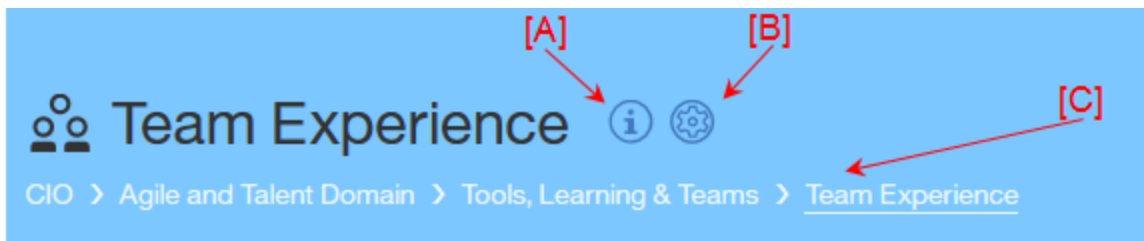


3) Seeing your team hierarchy, making changes to your team name or description as well as making changes to your parent team or even deleting a team is performed easily from the team area.

[A] To change the team name or description click the 'Team Information' icon

[B] To change the parent team association or to delete a team click on the 'Team Setup' icon

[C] The Team hierarchy is easily visible right under the team name



4) To update your bookmarks, formerly called important links, click on the 'Team Bookmarks' icon



5) To display, edit, add team members as well as their Agile Roles, Allocation % and if they work Full Time or Part Time, click on the 'Team Members' icon. You will notice that all fields can be updated on the single team member line!



6) Results of your team's most recently submitted maturity assessment is viewable right under your team information area.

[A] Your overall result is displayed on a sliding scale from Initiating to Scaling. Information for an assessment in a draft status is not displayed here.

[B] Previous assessments can easily be selected.

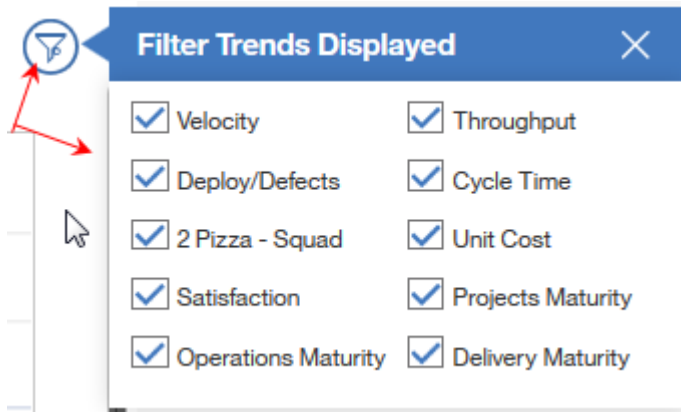
[C] Reviewing your action plan is as easy as clicking a button.

[D] Easy to start a new assessment.

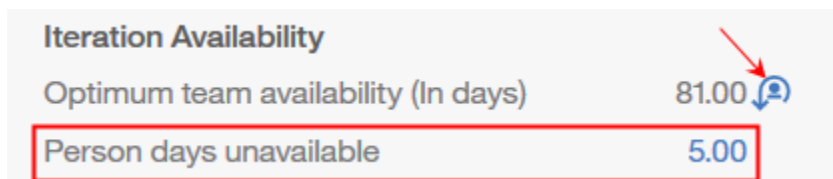


7) As you enter your iteration information into the Overview section on the right-hand side, your graphs will be updated as you enter the data and tab to the next field. Assumption: The current system date is > or = to the iteration end date.

8) If there are graphs in the Trends section that you do not want to display you can click on the 'Filter Trends' icon and deselect them from the list. This will apply to all teams you select from the team navigation area on the left-hand side. To bring the charts back, just click the icon and then check any graphs you want back in your view. For now, these filter settings are only saved for the session, not long term, but it is in our plan.



9) We have introduced the concept of 'Person Days' for each iteration. We compute the optimum team availability, in days, based on the number of work days (Mon-Fri) in an iteration from the iteration Start / End Date, the team member's Allocation % and their Full Time, Part Time status. All you have to do is enter the total number of days your team members were unavailable during the iteration as a whole (red box below). If you make changes to your team structure during the course of an iteration you can reset the Optimum team availability value by clicking on the 'Team Reset' icon (arrow).



10) Because of number 9 above, it is imperative that you as the iteration Manager ensure the following are correct for each team member:

[A] Allocation %

[B] Average Work Week (Full Time, Half Time, or Part Time expressed as a %, i.e if the team member works 2 full days a week it would be 40% with each full work day representing 20%.)



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Iteration Manager

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[A]
100%

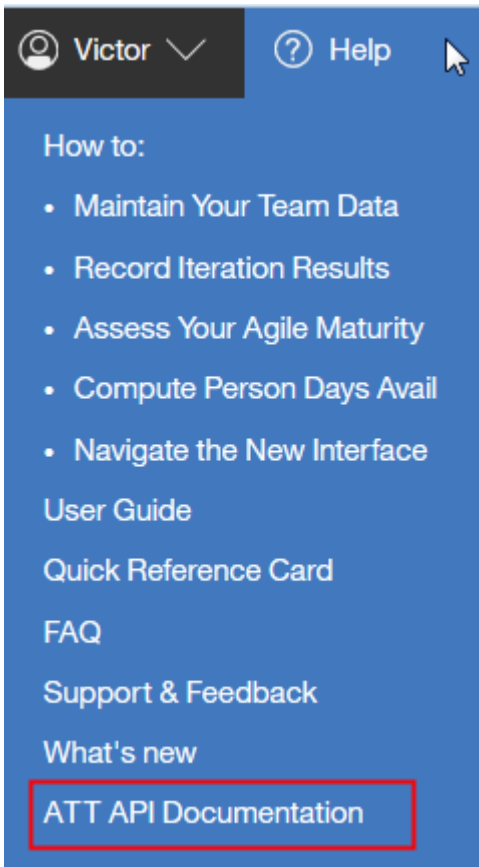
[B]
40%

Appendix E – API Information

Our development team has created an API for the Agile Team Tool. We could not possibly create APIs for all possible combinations of track & plan tools that are available on the free market but we are working with colleagues to provide APIs for the following:

- *Rational Team Concert (RTC)* *In limited use*
- *Trello* *Available as a Power-Up*
- *Jira* *Planned*

If you are interested in creating your own API to interface with the Agile Team Tool, we have a link to our API documentation in the Help section of the tool in the upper right corner. See screen shot below.



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