

Agile and Waterfall Working Together

More and more companies are shifting from traditional Waterfall practices (milestone, phase-gate based) to Agile practices (iterative, continuous value delivery based). Purists believe that you must choose one over the other. But many find that a mixture of both may not only be required by program oversight or by financial tracking policies in large corporations but also can be desirable - especially during the transition to Agile. Consider the following circumstances under which it may be pragmatic to mix Waterfall and Agile practices.

- 1 Matching up with budget / financial cycles.**

Most enterprise level business practices are tied to the budgeting and financial cycles which are inherently milestone and period based. In Agile, we need to tie continuous delivery to the financial milestones. This is particularly important related to funding of initiatives and reporting against financial periods.
- 2 Working with business owners and users.**

Typically the first to adopt Agile practices are technology teams. Over time, more business teams are moving towards Agile practices. But in the interim, technology development teams need to align work with the practices of the business. For instance, when business teams produce items like training materials and user playbooks, milestones for delivery of these need to align to the development team sprint cycles.
- 3 Interfacing with external organizations.**

Many programs rely on external vendors or other internal organizations outside of the development team. Often these external teams don't follow or have yet to adopt Agile practices. It is important to align deliveries to / from these external organizations with the sprint outcomes.
- 4 Determining requirements.**

Agile practices rely on a backlog of items on which the development team works. At the beginning of the program, the backlog of items may not be known. Although Agile approaches could be followed to build the backlog, sometimes following a more traditional Waterfall business requirements generation process provides an effective way for the team to create the initial backlog and meet stakeholder initial expectations.
- 5 Testing across areas.**

A key Agile practice is continuous integration and system testing all of the components together. But often, especially in large organizations, an integrated test environment may not be available as Agile practices are first established. More traditional System Integration Testing (SIT) and User Acceptance Testing (UAT) phases may be necessary to align testing across interface boundaries and various application environments.
- 6 Implementing software packages.**

Agile development works particularly well for custom development where new features are continually added as the capability set grows over time. But when implementing pre-packaged software that requires an entire base set of code to be implemented and configured, it can sometimes be challenging to continuously deliver in small increments. A Waterfall approach may be more appropriate as the base foundation is established.
- 7 Reporting status against roadmaps.**

Often the tools and expectations for status reporting are based on projects following a Waterfall approach. To report progress of Agile programs into the tool, teams need to translate Agile deliveries into Waterfall reporting. Sprints track completion at the story level. But features comprised of multiple stories often need to be tied to a long-term roadmap for reporting and communication within overall portfolio management.

About the Author

Brian Walker is a Senior Director at Kenny & Company. With 20+ years of business, technology, and consulting experience, Brian has led work with executives at Fortune 500 high technology, manufacturing, telecommunications, consumer products and hospitality companies to successfully realize value through large scale integration of people, processes, technology and strategy. Brian has led projects in Business Operations, Process Excellence, Lean/Agile, Program Management, Systems Integration, ERP, Change Management, Business & IT Strategy, Supply Chain Management, and Finance. Brian is a Certified SAFe® 4 Program Consultant (SPC), Certified Scrum Master (CSM) and Certified in Production and Inventory Management (CPIM).

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