

Agile Planning

Release and Iteration Planning



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Our Workshop Backlog (Agenda)

- Background on Agile Planning: 5 levels of planning
- Release Planning
- Iteration Planning

Some parts adapted from:



Your Agenda?

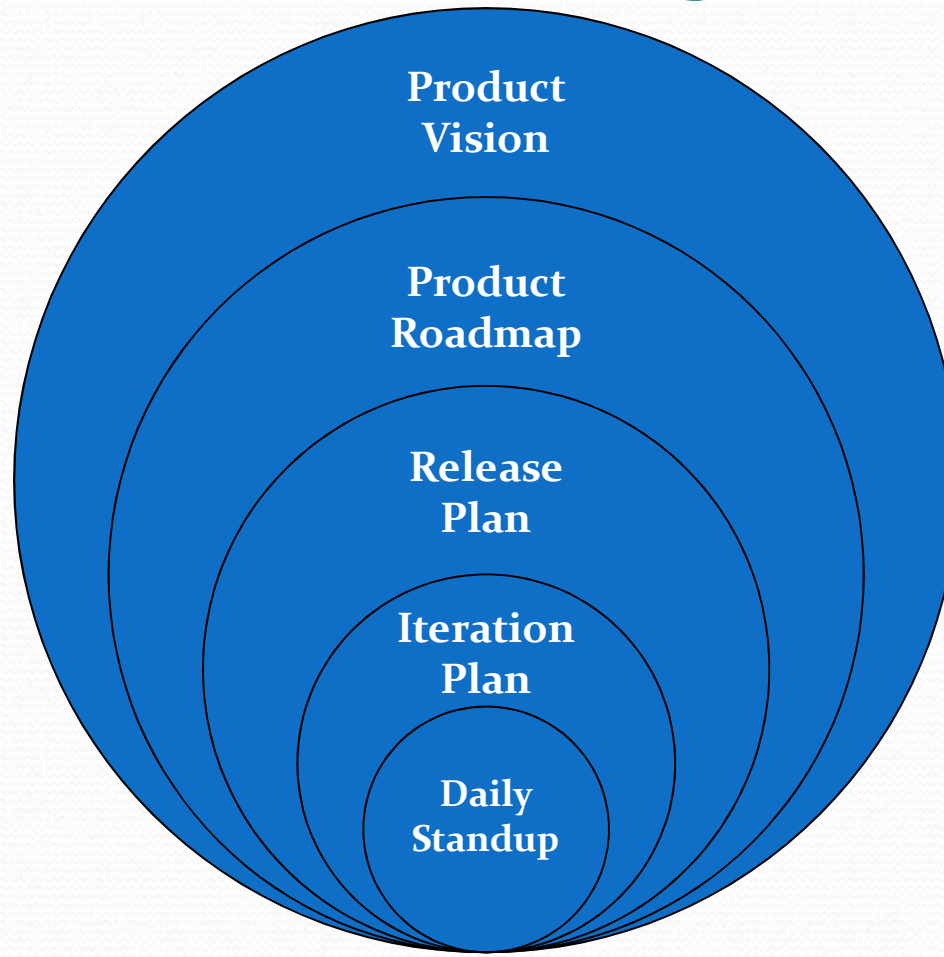
- Agile Workshop Demographics
- IMAGINE . . . Leaving session thinking, “This workshop was great, because . . .”

Some parts adapted from:



5 Levels of Planning

Adapted from "5 Levels of Agile Planning" by Hubert Smits

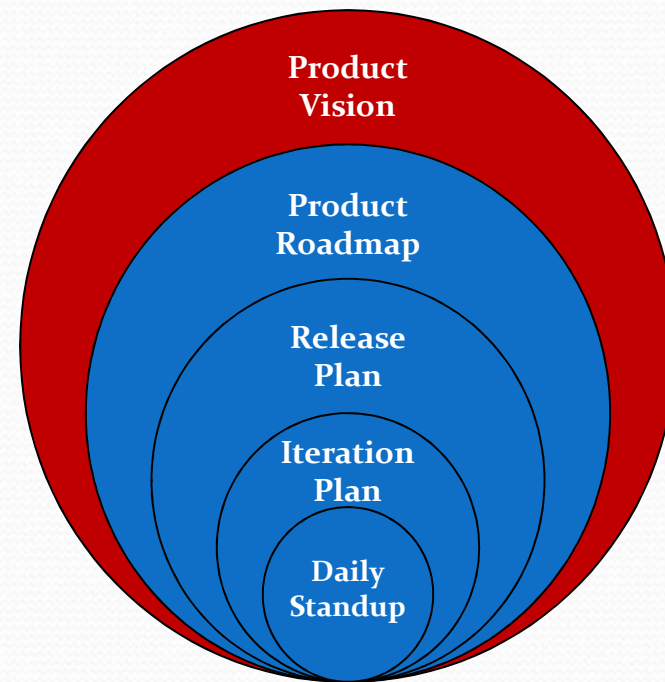


Some parts adapted from:



Product Vision

- What are you trying to accomplish?
- How is that going to benefit the business?

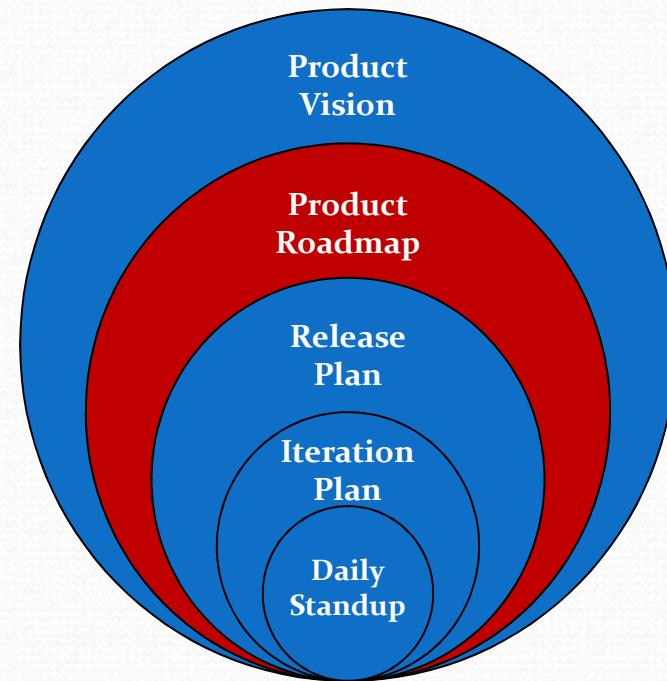


Some parts adapted from:



Product Roadmap

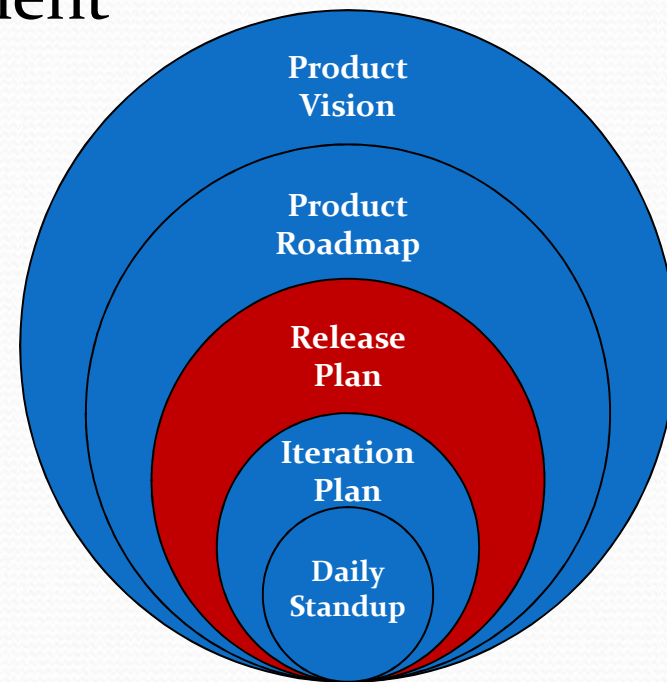
- High level themes for the next few releases
- Shows progress towards strategy
- Lots of “wiggle room”



Some parts adapted from:

Release Plan

- Goes into next level of detail towards themes
- Sets a common understanding
- A projection, not a commitment

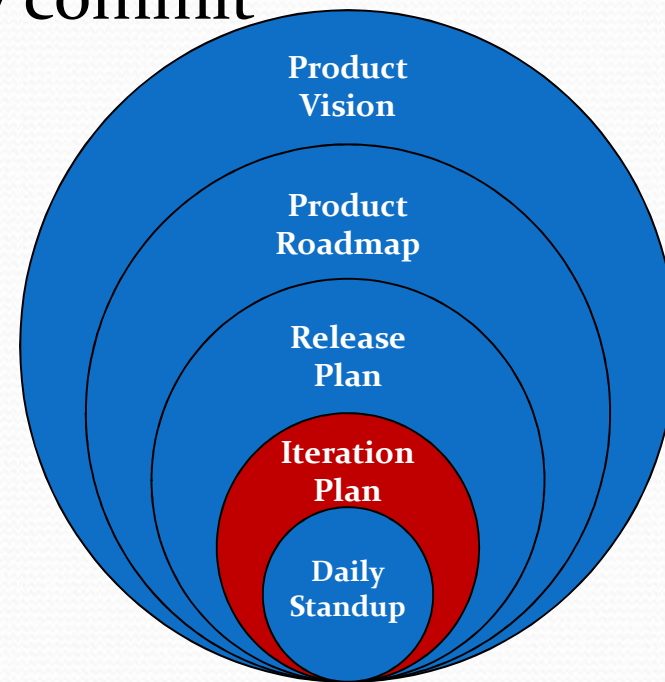


Some parts adapted from:



Iteration Plan

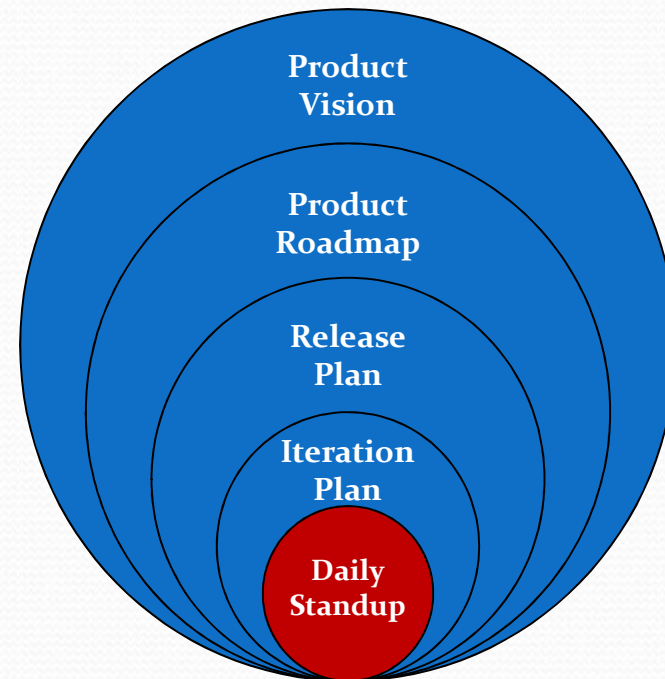
- Define scope as a team
- Define a clear understanding of “done”
- First level where you actually commit



Some parts adapted from:

Daily Standup

- First level of individual commitment
 - What did I do yesterday?
 - **What will I do today?**
 - What's blocking me?



Some parts adapted from:

Why do Release Planning?

- Get everyone on the same page
- Understand what you will likely achieve
- Balance load between the teams



Some parts adapted from:



Anti-Goals of Release Planning



Release Planning is not a commitment!

Some parts adapted from:



Preparing for Release Planning

- Set themes
- Prepare the backlog
- Divvy stories up
- Understand the issues
- Identify key dates



Some parts adapted from:

What is a Story?

- Independent
- Negotiable
- Valuable
- Estimatable
- Small
- Testable



Some parts adapted from:



Staying Releasable

- Define what “Done” means for your team
- Make “Done” more stringent over time
- Definition of releasable evolves as you do

Some parts adapted from:



Exercise: Preparation

Background

- You are planning the first release of an agile project management tool
- You have two teams of engineers at your disposal
- Break into teams of four: 1 product owner, 2 scrum masters and an architect

Goals

- Identify themes
- Identify and prioritize high level stories
- Identify design assumptions
- Identify key release dates



Some parts adapted from:

Attendees

- Product Owners
- ScrumMasters
- Architects / Leads
- QA
- Writers
- Other Stakeholders



This is the best time to travel!

Some parts adapted from:



The Agenda

- Kick off / Overview
- Break Out Sessions
- Review Results

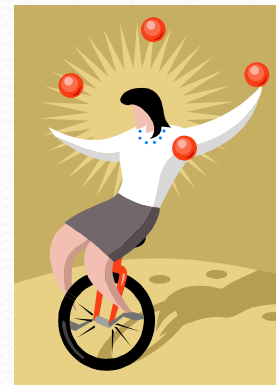


Some parts adapted from:



Keep In Mind

- Do significant install/upgrade/architecture early
- Staying releasable is the highest priority
- Take the hit to cross train
- Keep it simple



Some parts adapted from:



Deliverables

- Plan for each Iteration
- Assumptions
- Dependencies
- Risks



Some parts adapted from:



Exercise: Release Planning

Goals

- Map stories from prior exercise to iterations for each team
- Identify assumptions, dependencies and risks



Some parts adapted from:



Review Results

- Go through each iteration for each team
- Are things synched up across teams?
- Are you attacking the most important stories?
- Does the team believe in the results?



Some parts adapted from:



After The Meeting

- Capture the results in your tool of choice
- Update after each iteration



Some parts adapted from:



After the Release

- Do a release retrospective



Some parts adapted from:



Release Planning Summary

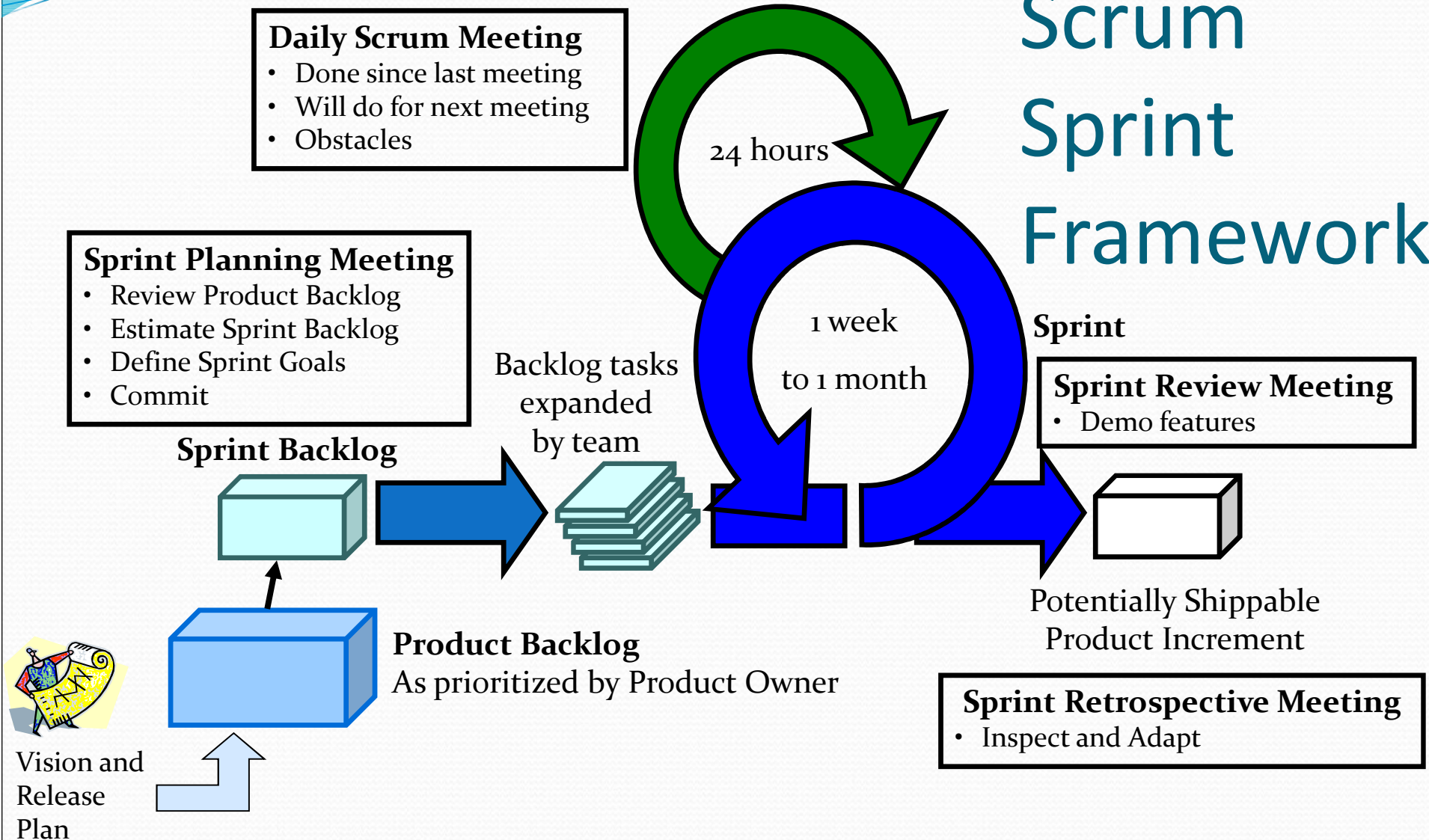
- Success = Shared Understanding of What and How



Some parts adapted from:



Scrum Sprint Framework



Some parts adapted from:



Before you Start

- Well Groomed Product Backlog
 - Prioritized Stories
 - Estimated Stories
- Sprint Theme/Goal
- Prestaged Sprint Backlog (a matter of taste)



Number of Stories: 5 Velocity Used: 23 of 42.33 (54%) - ACME

Name	Owner	Effort	Status	Public	Rank	User Rank	
+ User searches for books by author, title or ISBN number	Sue Tester	7	Blocked	true	1	1	
+ User views detailed information on a book	Sue Tester	5	In Progress	true	2	4	
+ Administrator adds new books to site	Sue Tester	5	Created	true	6	5	
+ Administrator deletes book	Sue Tester	3	Created	true	7	6	
+ Administrator edits existing book info	Sue Tester	3	Created	true	8	7	

Estimated

Prioritized

Some parts adapted from:



A Typical Sprint Planning Session

- Prestaged Sprint Backlog Review
 - Sprint Goal
 - Overview of Stories
- Logistics
 - Review Previous Sprint Velocity
 - Review Team Availability
 - Review Definition of Done
- Story Deep Dives
- Tasking out the stories
- The Commitment

Typical Duration: 3-8 hours

Attendees:

- Product owner
- Delivery team

Materials:

- Stories (cards or online)
- Task planning material (cards, whiteboard, online)
- Planning/estimation materials (e.g. planning poker cards)

Some parts adapted from:



Reviewing Stories

- Product Owner
 - Explain the Goal (theme)
 - Explain how the team will get there
 - Make priority adjustments based on feedback from delivery team
- Delivery Team
 - ASK QUESTIONS
 - Understand the Goal, not just the desired features
 - This is the key to flexibility and risk management

Some parts adapted from:



Logistics

- Review historical velocity (yesterday's weather)
 - Adjust the prestaged backlog as necessary...
- Review Team Availability
 - Vacations
 - Meetings
 - L3 Support, outside commitment, etc
 - Adjust the prestaged backlog as necessary...
- Review the Definition of Done

Some parts adapted from:



Understanding the Story

- Product Owner
 - Explain the Story
 - Elaborate on acceptance criteria/tests
 - Explain the “Why” (“as a <role> I <what> so that <WHY>”)
 - Break down stories as needed
 - Make priority adjustments based on feedback from delivery team
- Delivery Team
 - Understand the story
 - Validate the size/implementability
 - Ask for stories to be broken down as required
 - Understand and question the acceptance criteria (how will you build a test for each?)

Some parts adapted from:



Define Tasks – Estimate Hours

(wisdom from Rally)

- Through Conversation, define tasks
 - Listen to different perspectives
 - Think about what needs to get done, not what my traditional role completes
 - Don't . . .
 - make task too granular (don't do 10 minute tasks)
 - Make task too large (1 sprint length)
 - Agree to the tasks
- Team members sign up for tasks, NOT assigned by the Scrum Master
- Estimate the task work
 - Can estimate ahead of time, but best after knowing who is accepting task
- Validate capacity again; May need to refine stories in Sprint
- Team Commits to Sprint
 - Fist of Five – Don't Skip this Commitment
- A note about tasks . . .
 - Any team member can add, delete, or change
 - Tasks (content, estimates, sign-up) can change (or emerge) during the Sprint
 - Don't go back and refine Story Point (unless . . .)

Some parts adapted from:



Managing your Tasks

Name	Owner	Effort	Status	Public	Rank	User Rank
- User searches for books by author, title or ISBN number	Sue Tester	7	Blocked	true	1	1.0
Add more details to results	Bob Developer	2	Blocked			
Add search by author or ISBN	Bob Developer	1	In Progress			
Search by title showing just titles	Bob Developer	2	Created			
Test search	Sue Tester	2	Created			
+ User views detailed information on a book	Sue Tester	5	In Progress	true	2	4






Tasks	Mon	Tues	Wed	Thurs	Fri
Code the user interface	8	4	8		
Code the middle tier	16	12	10	4	
Test the middle tier	8	16	16	11	8
Write online help	12				
Write the foo class	8	8	8	8	8
Add error logging			8	4	



Task description	Commit	Status	days remaining				
			9/27	9/28	9/29	9/30	10/1
Sprint 3 for MultiVue Install			32	0	0	0	0
IT Team Tasks			256	0	0	0	0
Requirements Component							
Project Requirements Gathering	Campbell	Not started	16				
Formal Requirements Documentation	Campbell	Not started	8				
MultiVue Configuration Component							
Append Additional Demographics	Campbell	Not started	16				
SAP database Component							
Design SAP Database	Campbell	Not started	16				
Creation of the SAP Database	Campbell	Not started	4				
Create stored procedures on SAP database	Campbell	Not started	12				
SAP Code Component							
Creation of SAP .NET Component	Jan	Not started	16				
Creation of SAP Web Application	Jan	Not started	16				
SAP Security							
Creation of Security Administration Site	Campbell	Not started	24				
Secure Messaging	Campbell	Not started	12				
Security Integration	Jan	Not started	12				
SAP system testing	Campbell	Not started	8				
SAP System Verification	Campbell	Not started	8				
SAP Hardening							
Bug Fixing/ Cosmetic Changes	Mark	Not started	16				
Install in Live Environment	Campbell	Not started	16				
BizTalk 2004 Component							
Extend ePEX-3 Adaptor	Campbell	Not started	4				
Extend Sw ift A daptor	Mark	Not started	8				
Extend Upstream Schemas	Mark	Not started	8				
Create AIC schema	Campbell	Not started	4				
Create Mappings	Campbell	Not started	16				
Create SAPAIC	Mark	Not started	16				

The Commitment



- Everyone agrees the sprint is doable
- No really...EVERYONE agrees
- Use disagreement and uneasiness in team members to drive out hidden risks, tasks, and issues
- Drive agreement with a fist of five
 -  • This is the best idea possible
 -  • The only thing wrong with this idea is that it wasn't mine
 -  • I can support this idea
 -  • I'm uneasy about this and think we need to talk it out some more
 -  • Let's continue discussing this idea in the parking lot

Some parts adapted from:



Exercise: Iteration Planning

Goals

- Review
 - Sprint Goal
 - Overview of Stories
 - Previous Sprint Velocity
 - Team Availability
 - Definition of Done
- Deep Dive into Stories
- Task out the Stories
- Commit



Some parts adapted from:



Questions?

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