Analysis Across 5 Levels of Agile Planning

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dsmAgile

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- Business & IT Roles
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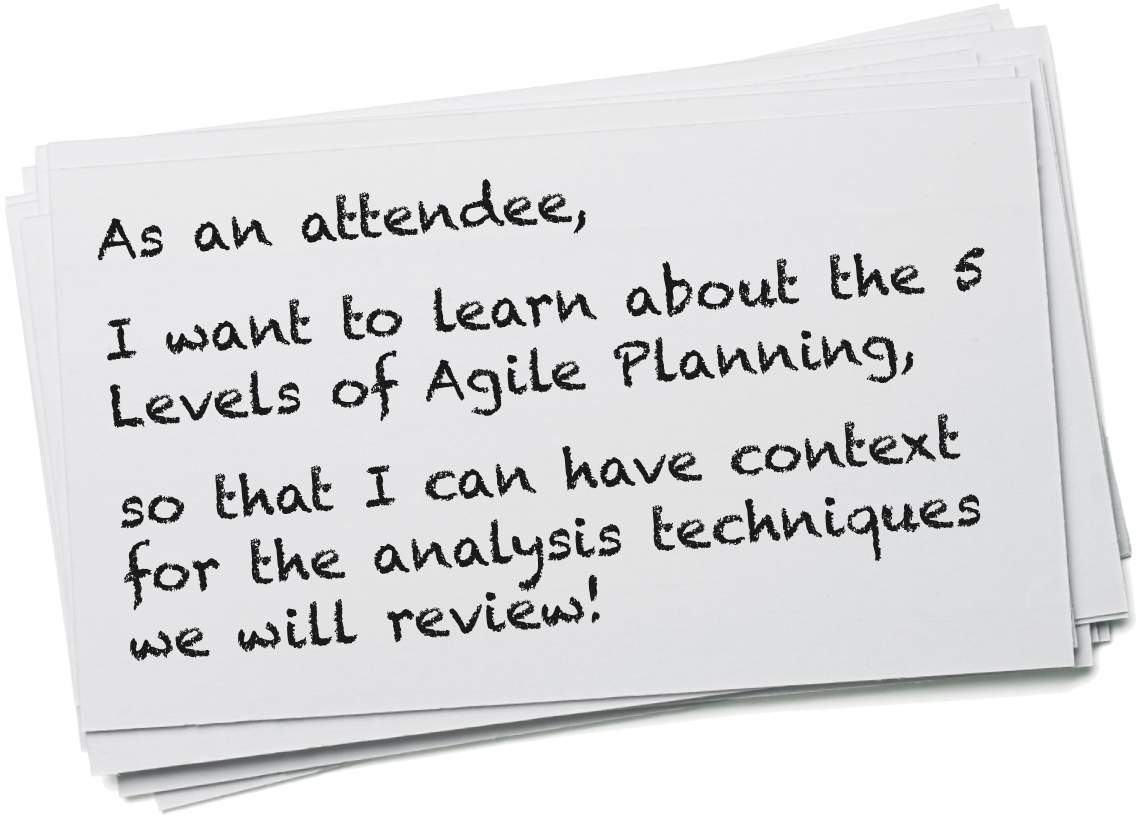
#BecomingAgile

Today's Exploration

- What are the 5 Levels of Agile Planning?
- When & How are the 5 Levels of Planning used?
- What are Agile Analysis approaches and techniques I can use at each level?
- What are pitfalls we might encounter?



The 5 Levels of Agile Planning

"When preparing for battle, I find that **plans** are **useless**, but ***planning*** is ***indispensable***"

- Dwight D. Eisenhower

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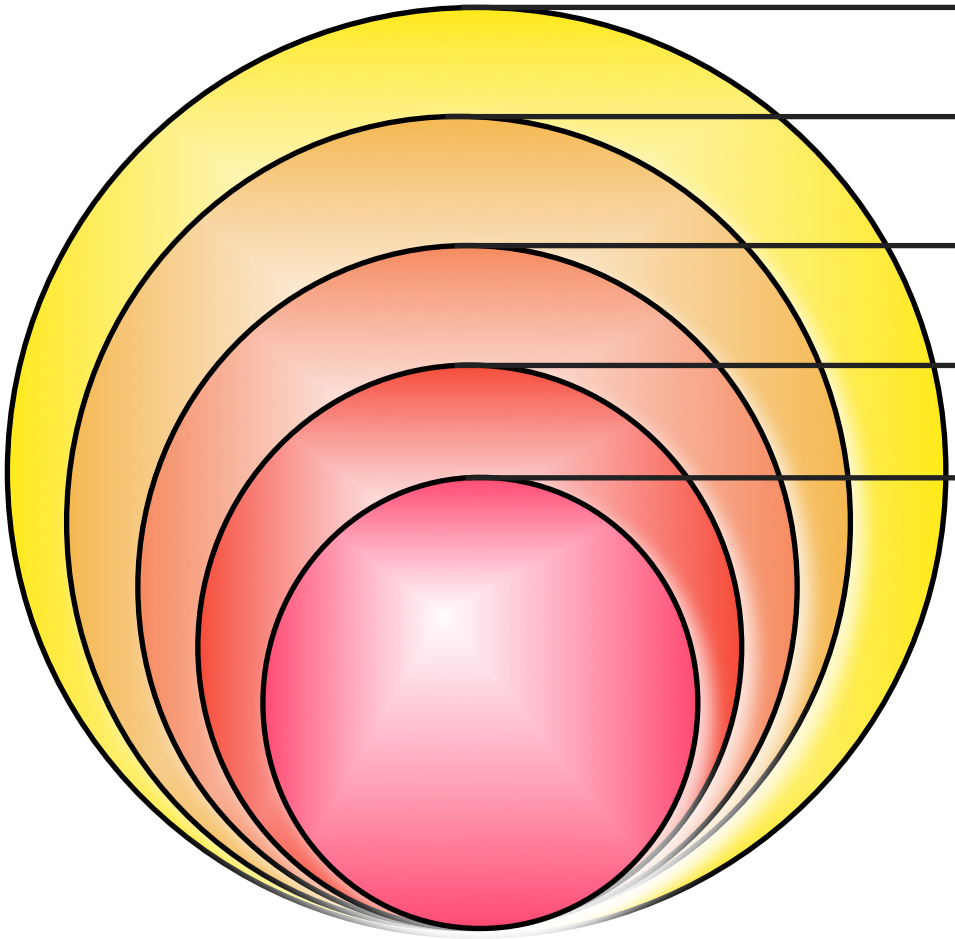
5 Levels of Agile Planning



Vision Planning 1
Revised every 6-12 months by the Product Owner

Roadmap Planning 2
Revised quarterly by Team & Stakeholders

Release Planning 3
Every 8-12 weeks by Team & Stakeholders

Increment Planning 4
Revised after each increment by Team

Daily Planning 5
Revised daily by Team Members

Always **accurate**, varying levels of precision

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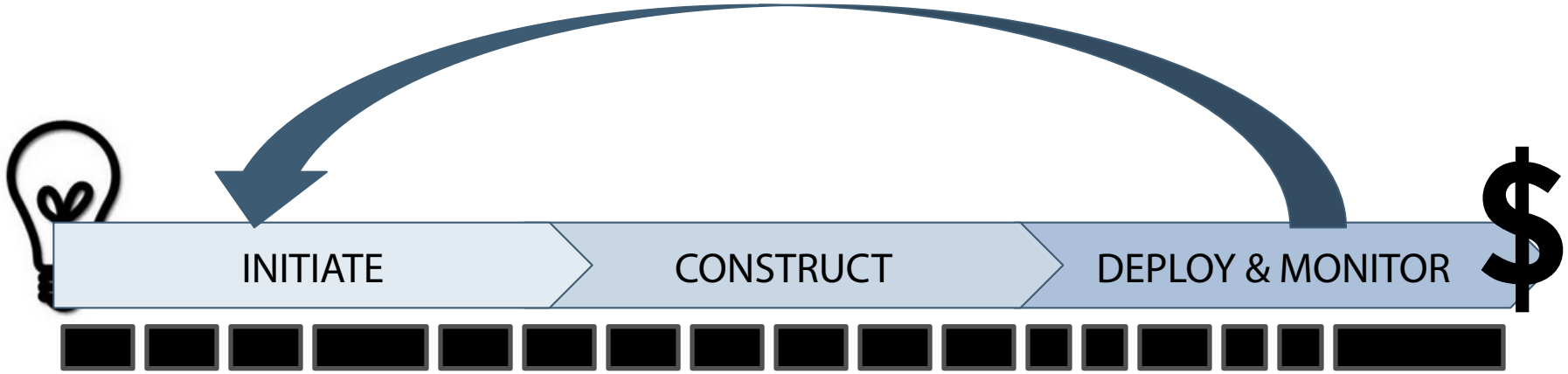
Value Streams



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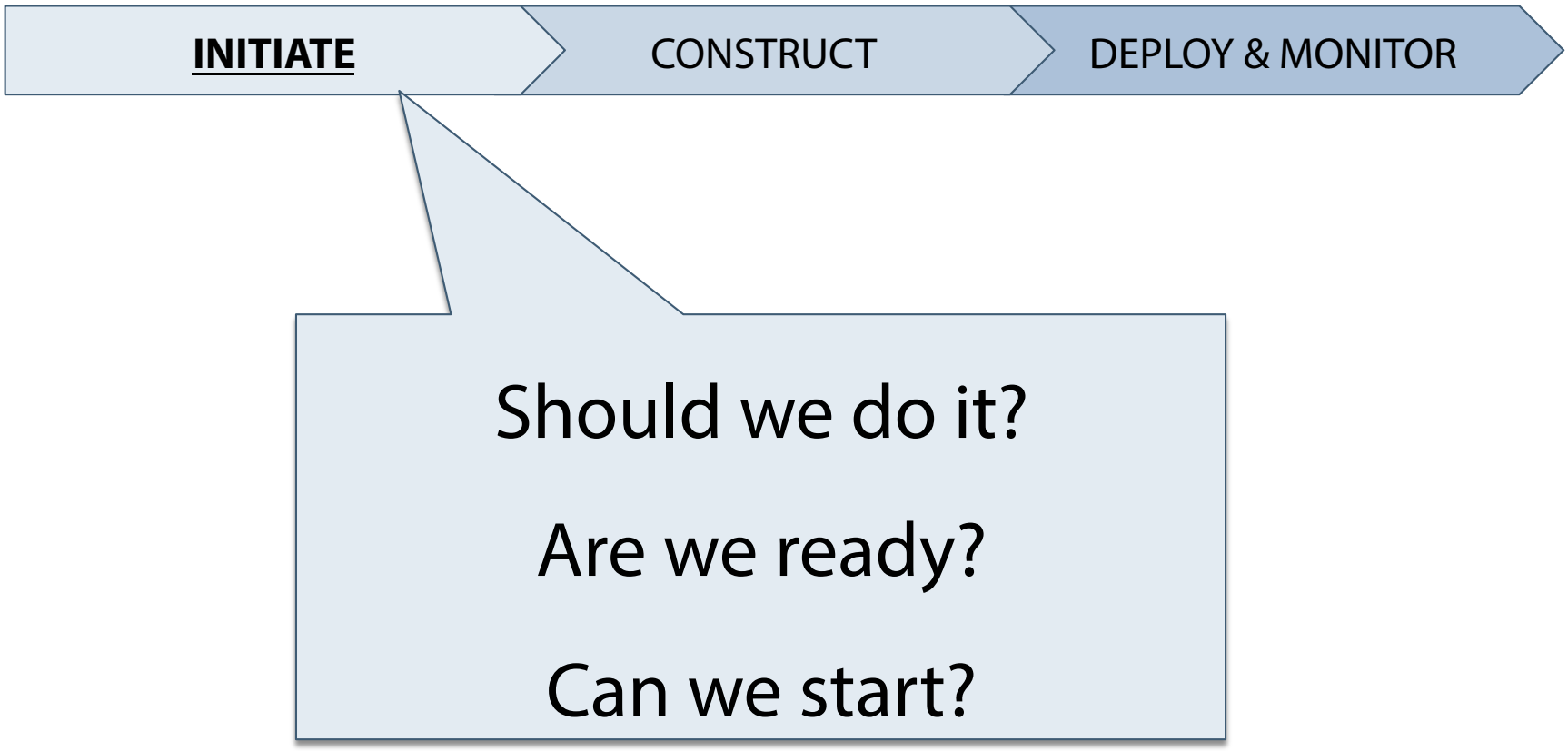
Activities Across the Value Stream



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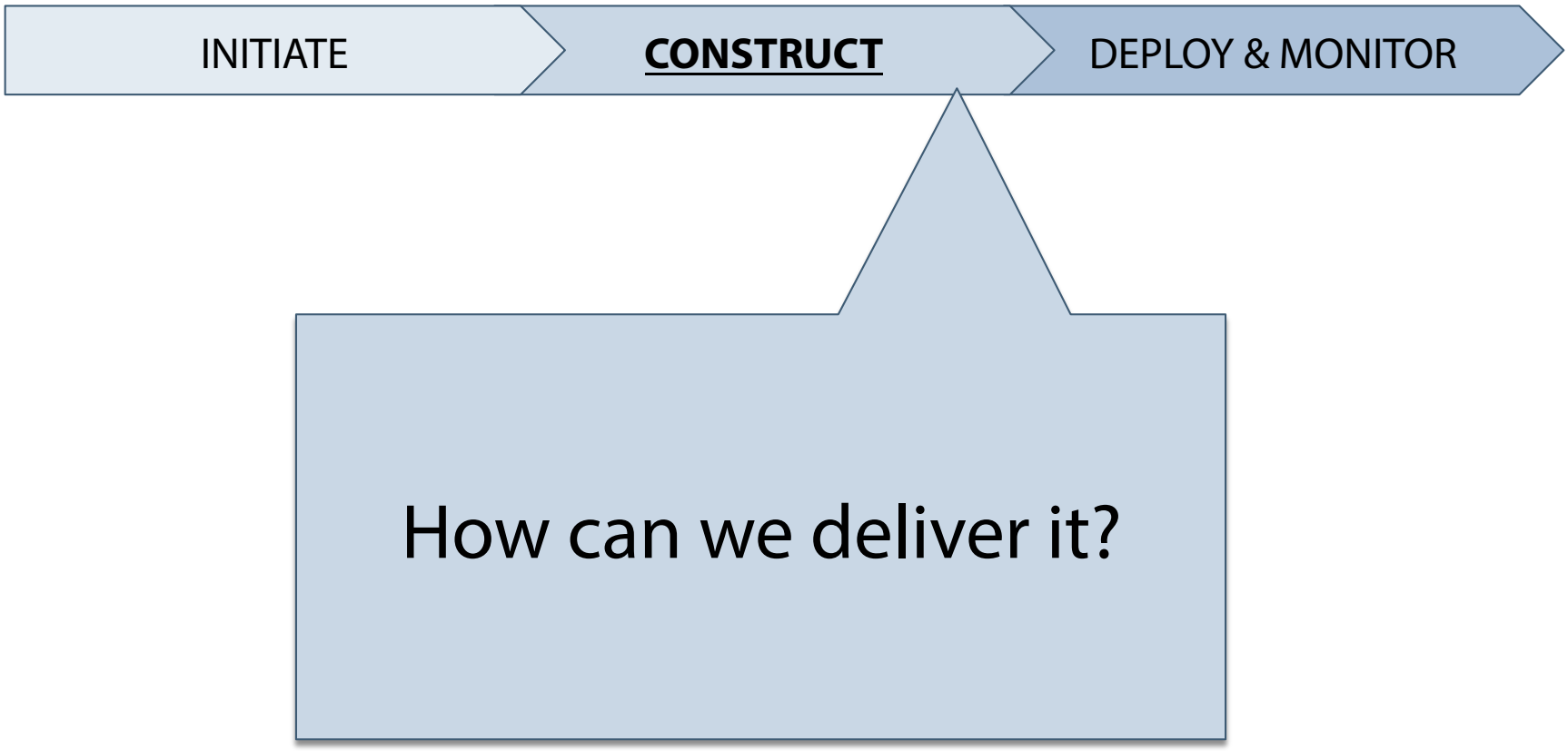
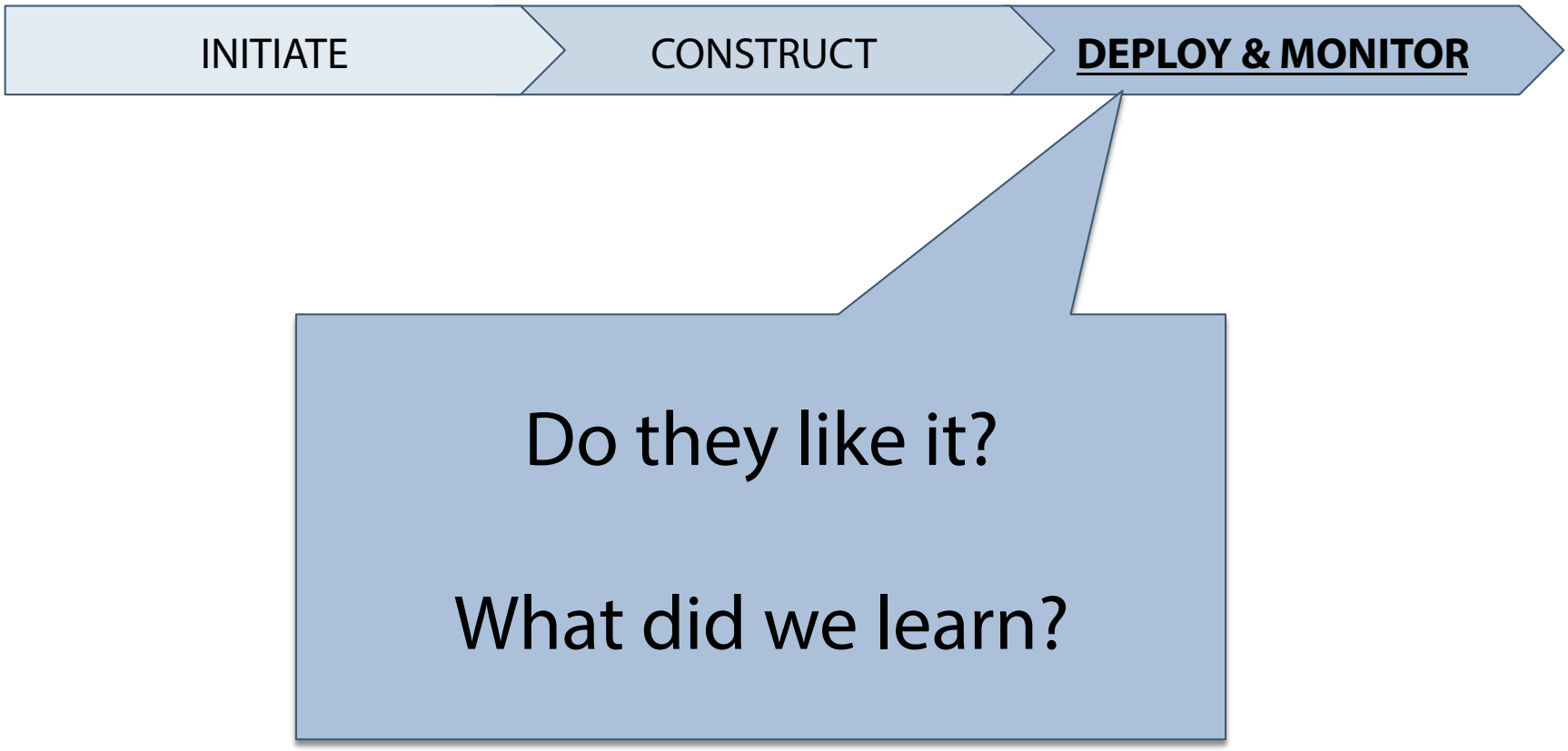
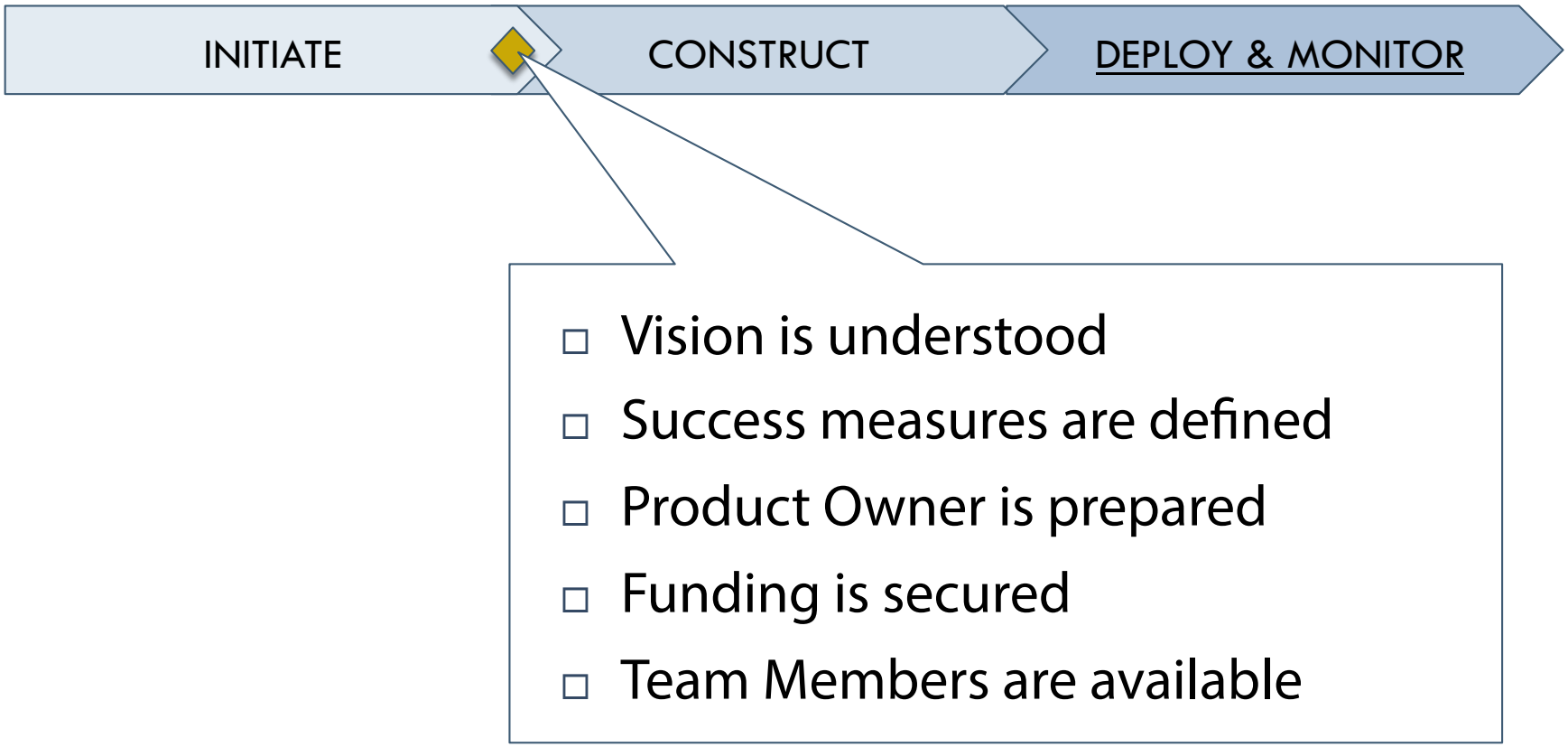
Activities Across the Value Stream

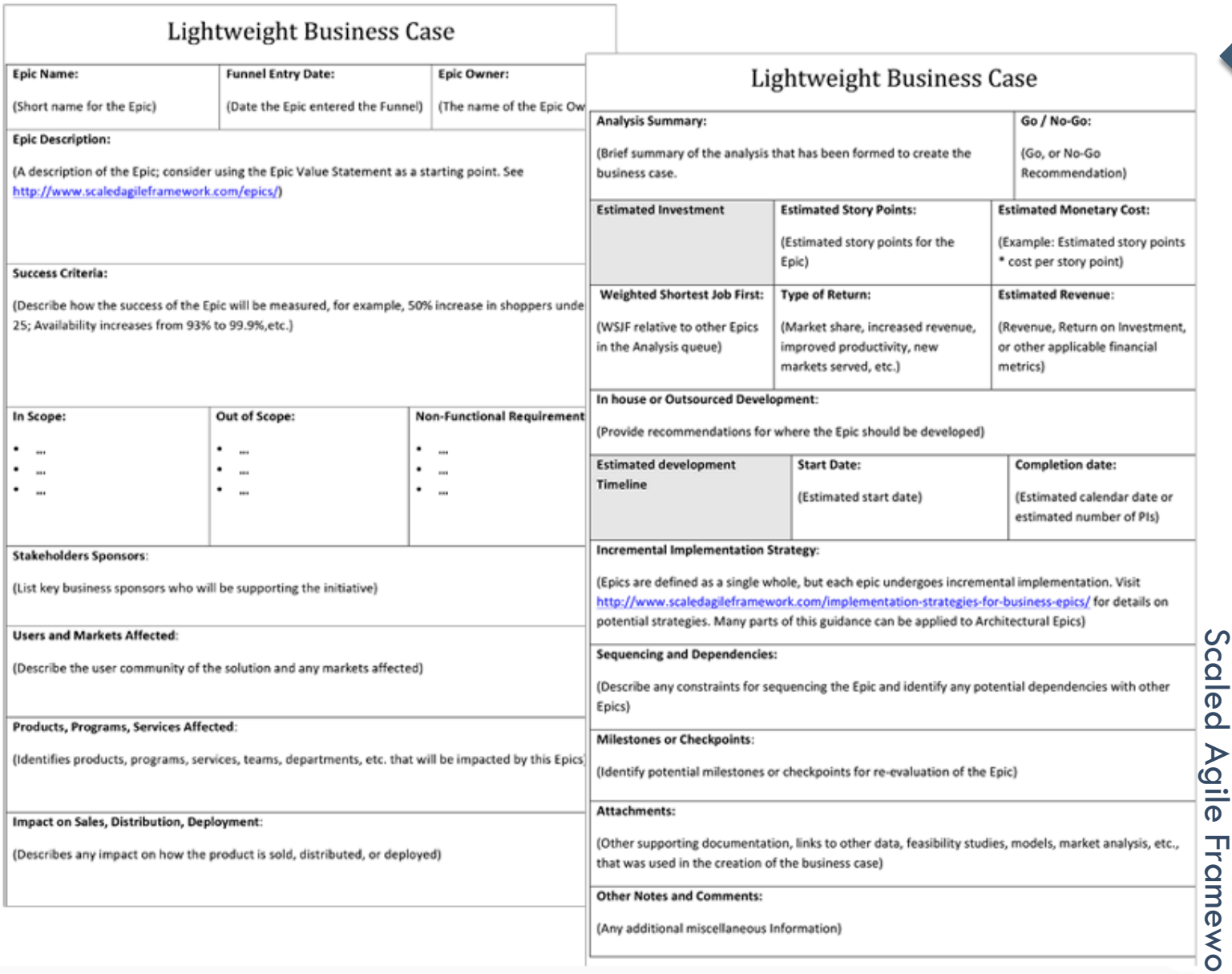


Activities Across the Value Stream



Criteria for Starting





Lightweight Business Case

Epic Name:	Funnel Entry Date:	Epic Owner:
(Short name for the Epic)	(Date the Epic entered the Funnel)	(The name of the Epic Ow

Epic Description:

(A description of the Epic; consider using the Epic Value Statement as a starting point. See http://www.scaledagileframework.com/epics/)

Success Criteria:

(Describe how the success of the Epic will be measured, for example, 50% increase in shoppers unde 25; Availability increases from 93% to 99.9%,etc.)

In Scope:	Out of Scope:	Non-Functional Requirement
• ...	• ...	• ...
• ...	• ...	• ...
• ...	• ...	• ...

Stakeholders Sponsors:

(List key business sponsors who will be supporting the initiative)

Users and Markets Affected:

(Describe the user community of the solution and any markets affected)

Products, Programs, Services Affected:

(Identifies products, programs, services, teams, departments, etc. that will be impacted by this Epics)

Impact on Sales, Distribution, Deployment:

(Describes any impact on how the product is sold, distributed, or deployed)

Lightweight Business Case

Analysis Summary:	Go / No-Go:
(Brief summary of the analysis that has been formed to create the business case.	(Go, or No-Go Recommendation)

Estimated Investment	Estimated Story Points:	Estimated Monetary Cost:
	(Estimated story points for the Epic)	(Example: Estimated story points * cost per story point)

Weighted Shortest Job First:	Type of Return:	Estimated Revenue:
(WSJF relative to other Epics in the Analysis queue)	(Market share, increased revenue, improved productivity, new markets served, etc.)	(Revenue, Return on Investment, or other applicable financial metrics)

In house or Outsourced Development:

(Provide recommendations for where the Epic should be developed)

Estimated development Timeline	Start Date:	Completion date:
	(Estimated start date)	(Estimated calendar date or estimated number of PIs)

Incremental Implementation Strategy:

(Epics are defined as a single whole, but each epic undergoes incremental implementation. Visit http://www.scaledagileframework.com/implementation-strategies-for-business-epics/ for details on potential strategies. Many parts of this guidance can be applied to Architectural Epics)

Sequencing and Dependencies:

(Describe any constraints for sequencing the Epic and identify any potential dependencies with other Epics)

Milestones or Checkpoints:

(Identify potential milestones or checkpoints for re-evaluation of the Epic)

Attachments:

(Other supporting documentation, links to other data, feasibility studies, models, market analysis, etc., that was used in the creation of the business case)

Other Notes and Comments:

(Any additional miscellaneous Information)

Figure 2. Epic Lightweight Business Case

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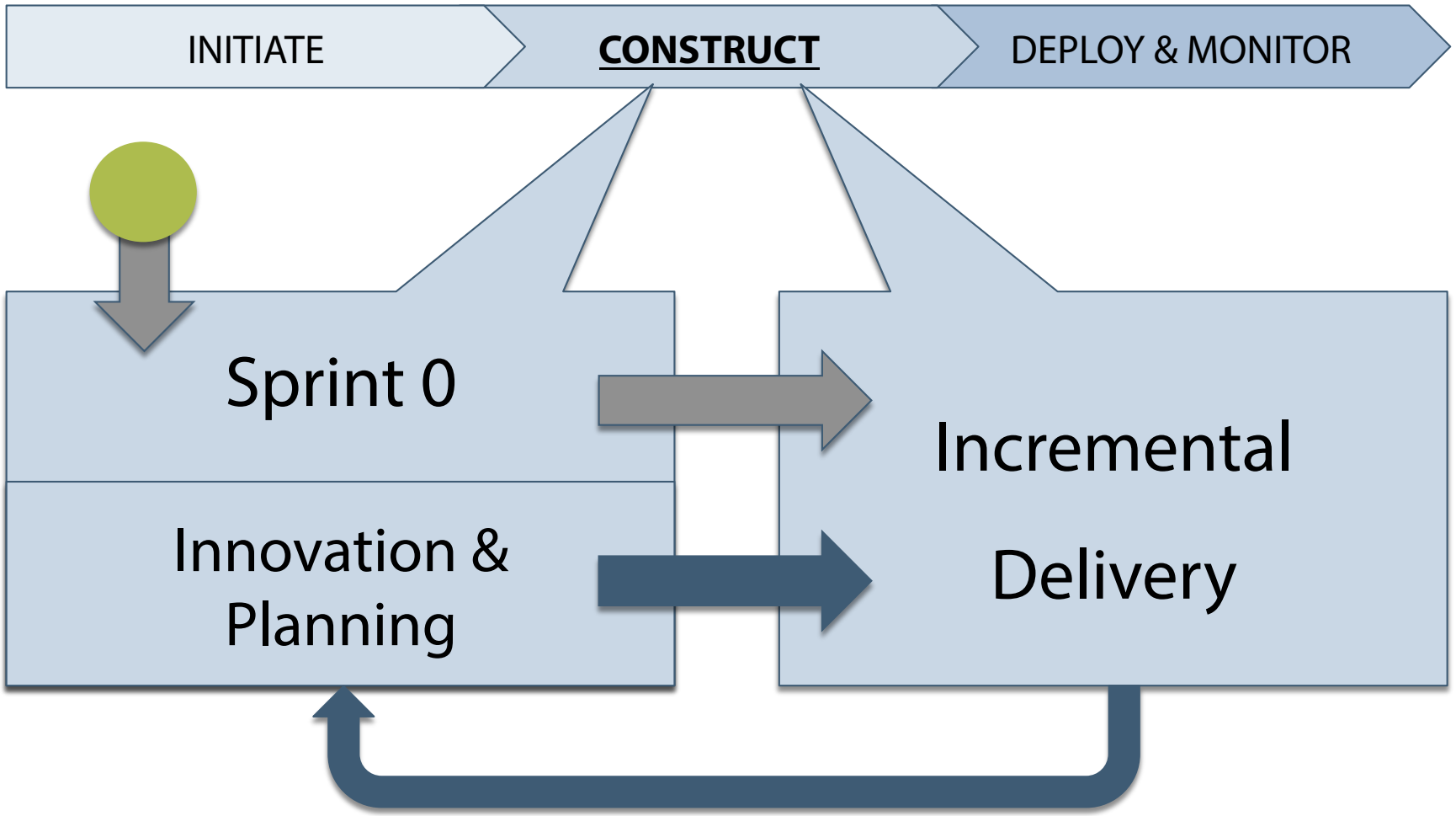
The 5 Levels on the Value Stream



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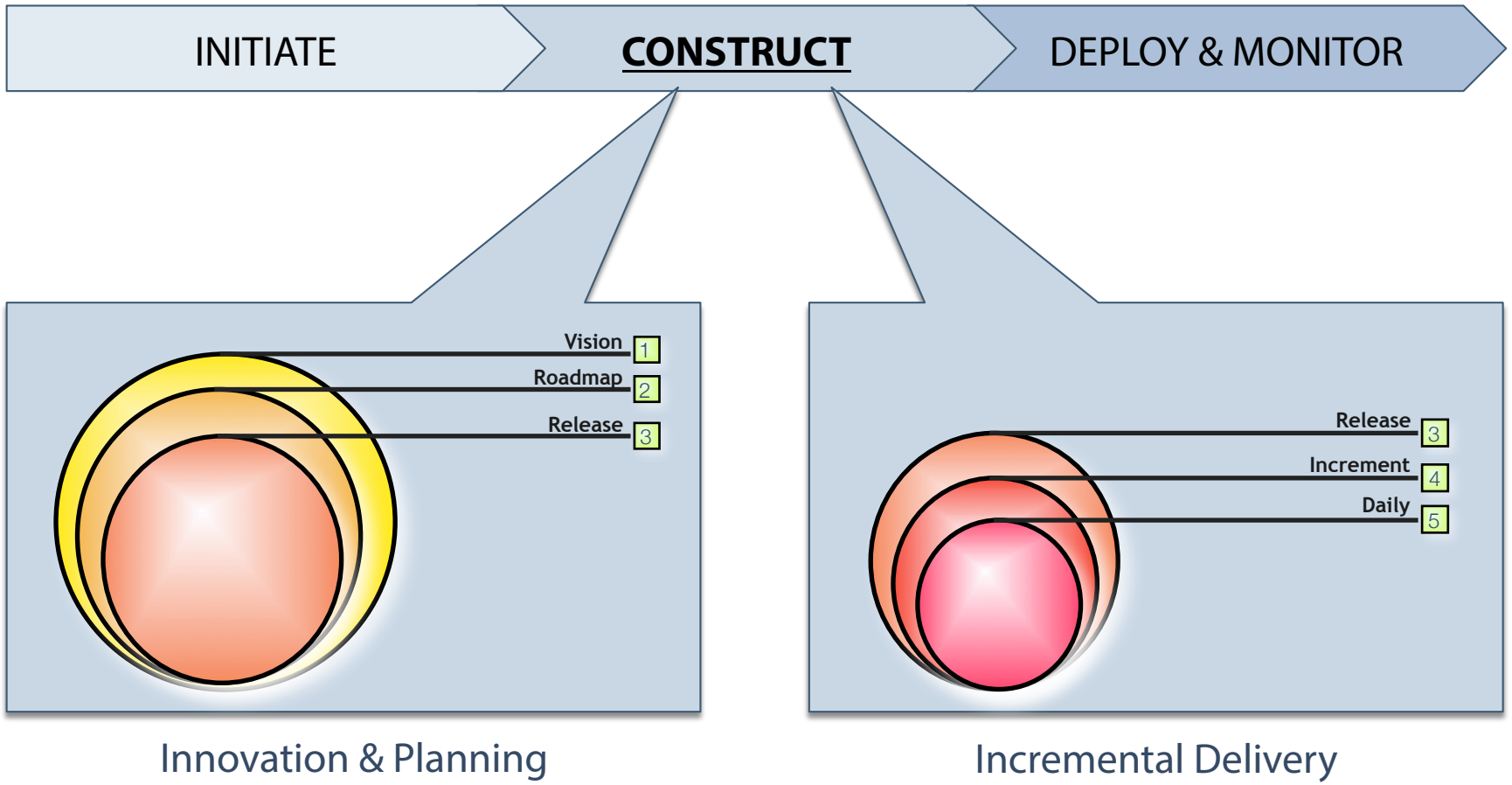
The 5 Levels on the Value Stream



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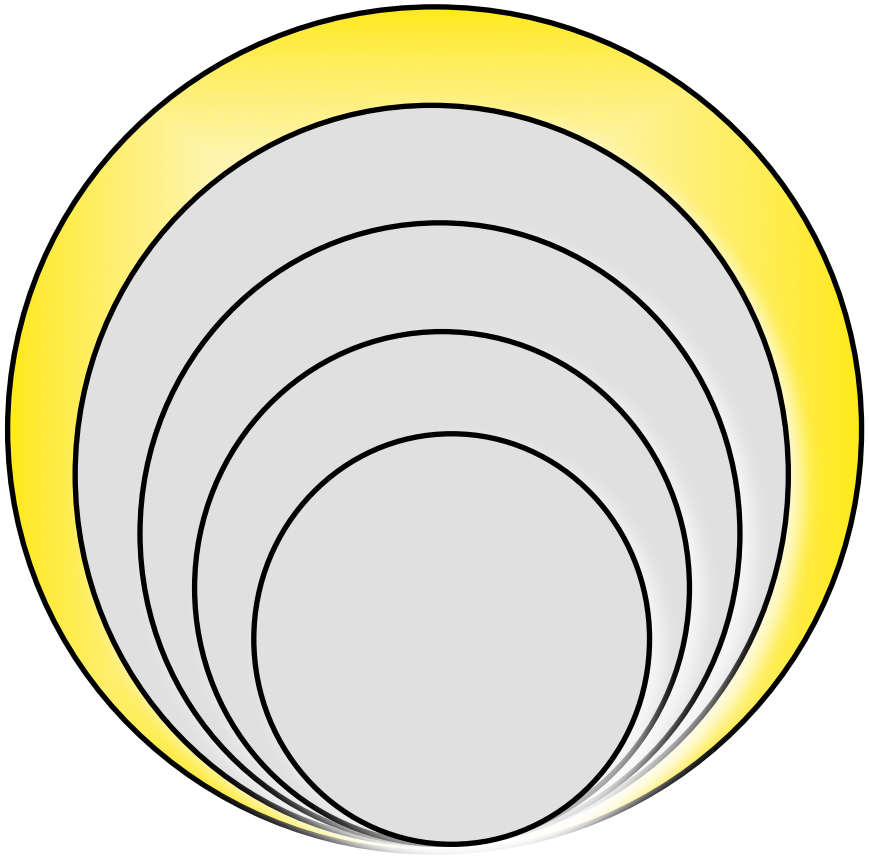

3 Approach & Techniques: Vision Planning

Always **accurate**, varying levels of precision

Elevator Pitch

For <description of the users>

Who <description of what the users need>

The <name of product/service>

is a <description of type of product/service>

That <compelling benefit>

Unlike <description of the competitive alternative>

Our product <primary differentiator>

Technique from Geoffery Moore

Design the Box

Bill Shackleford

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THE PRODUCT CANVAS

4

NAME
The name of the product.

GOAL
Your overarching goal.

METRICS
The measures to determine if the goal has been met.

TARGET GROUP
The users and the customers with their needs.

Personas are a great way to describe the target group.

BIG PICTURE
The desired user experience (UX): the user journeys, the product functionality, the visual design, and the nonfunctional properties.

Epics, scenarios, storyboards, workflows, design sketches, mock-ups, and constraint stories are helpful techniques.

PRODUCT DETAILS
The goal of the next iteration and specific actionable items to reach the goal.

The items are ordered from one to n, and may be captured as detailed user stories.

www.romanpichler.com
Template version 03/14

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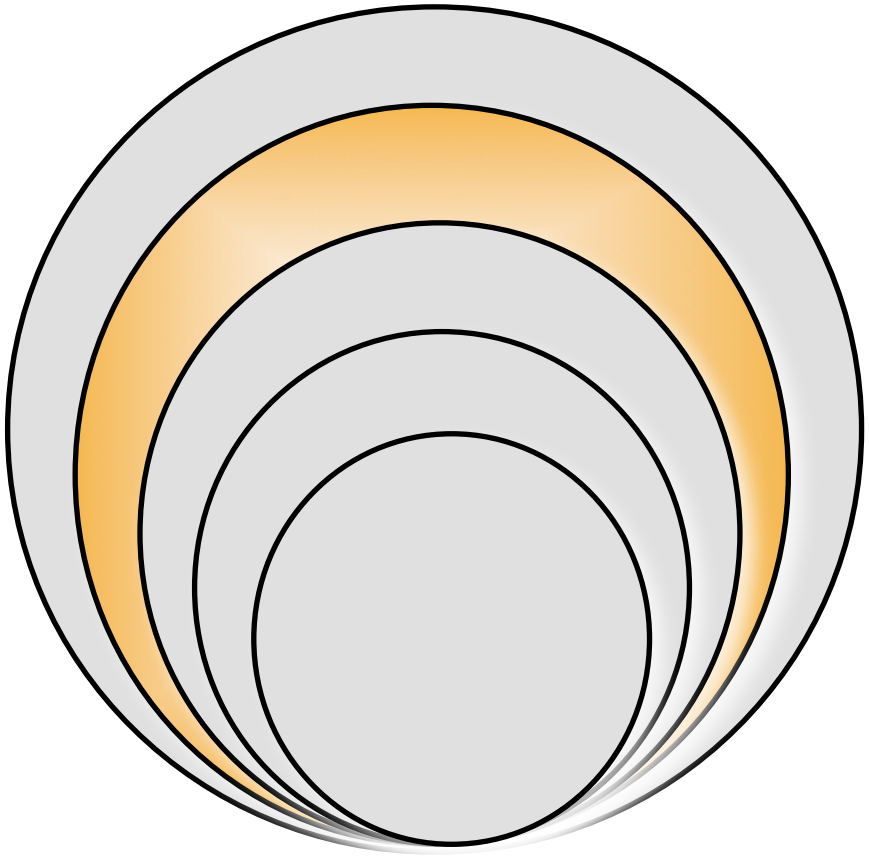
Vision Workshop

The goal is…

SHARED UNDERSTANDING,

not Shared Documentation



3

Approach & Techniques: Roadmap Planning

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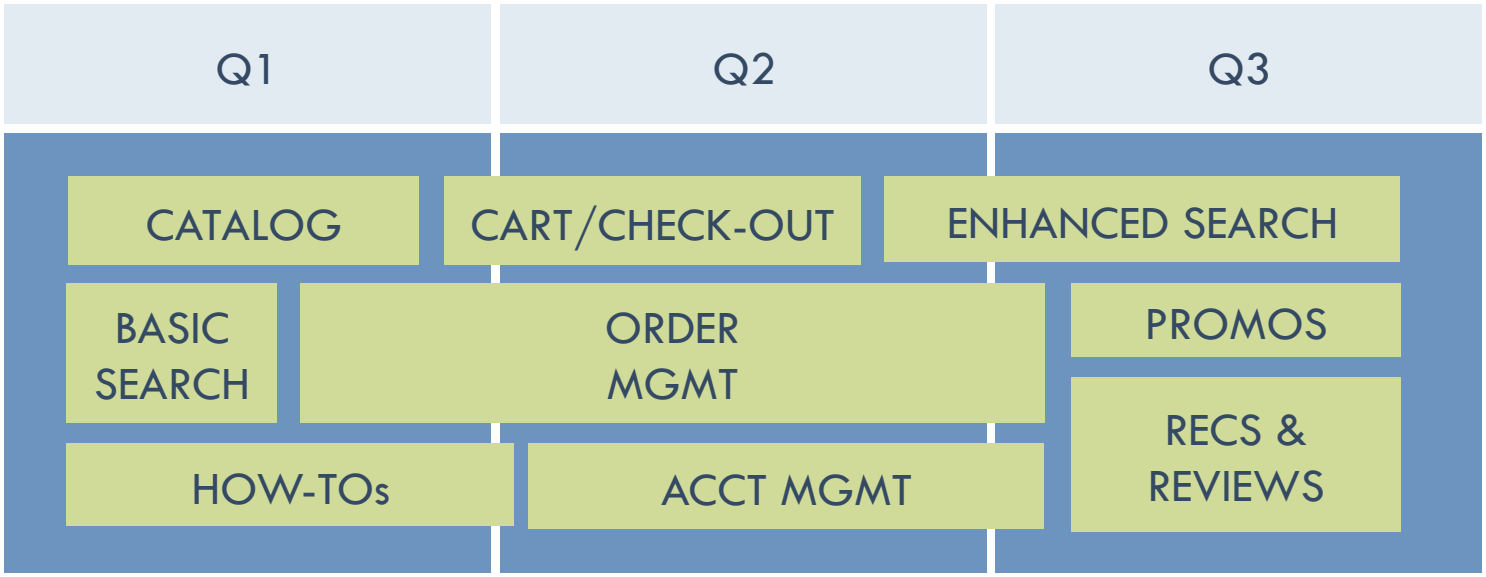
Product Roadmap



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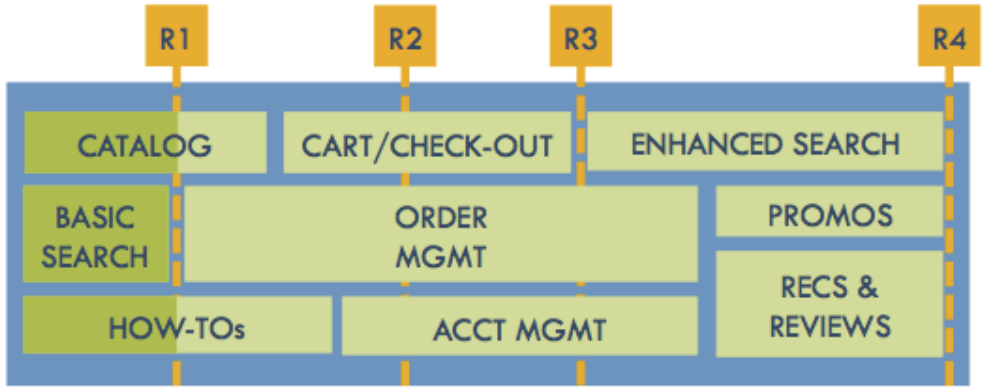
Feature Roadmap



R1	R2	R3
• Feature A • Feature B • Feature C • Feature D • Feature E • Feature F • Feature G	• Feature H • Feature I • Feature J • Feature K • Feature L • Feature M	• Feature N • Feature O • Feature P • Feature Q • Feature R • Feature S

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Weighted Shortest Job First

$$\frac{\text{Business Value} + \text{Time Criticality} + \text{Risk Reduction (or) Opportunity Enablement}}{\text{Job Size}} = \textbf{Cost of Delay}$$

Reinertsen

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Kano Analysis

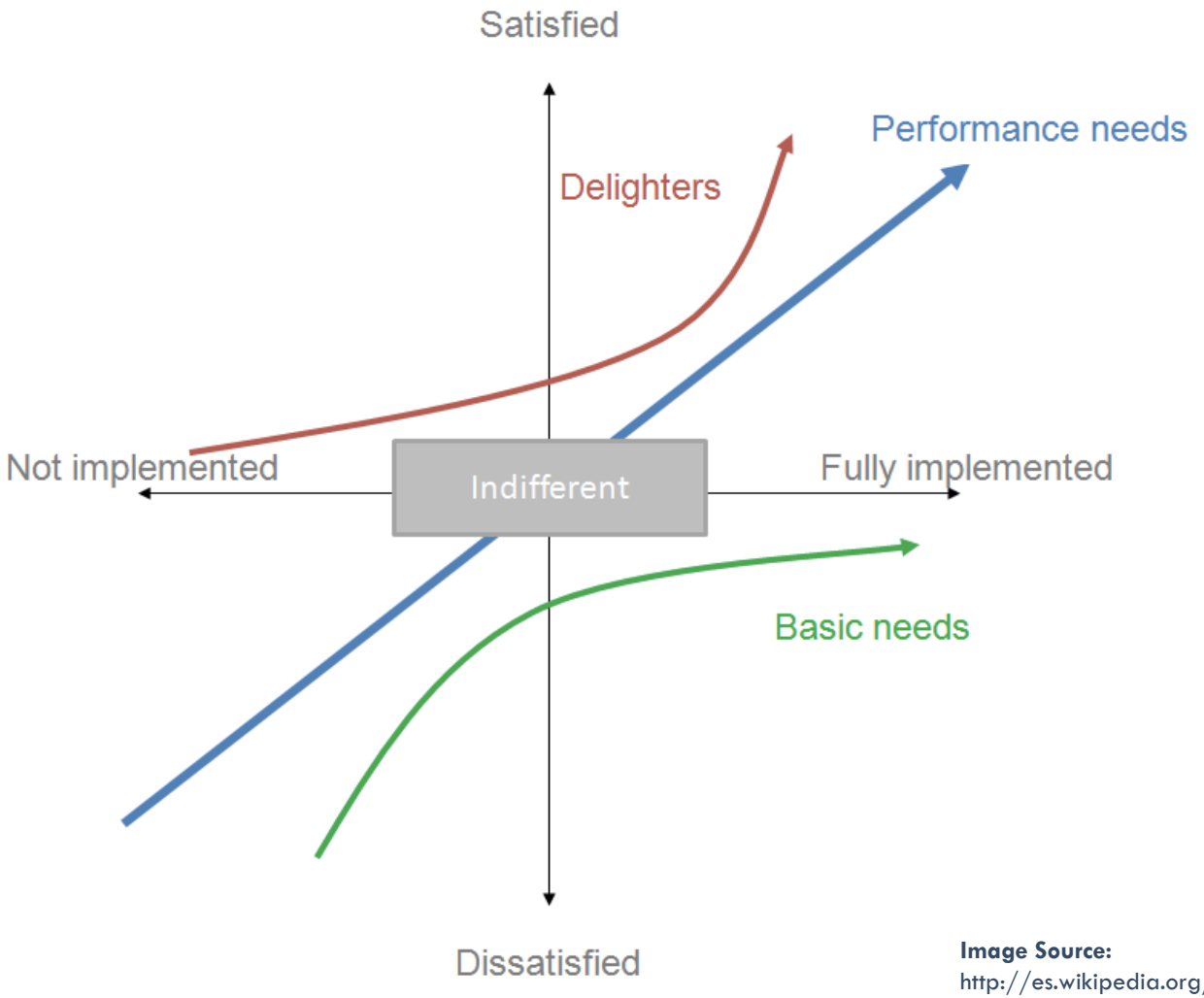

Image Source:
http://es.wikipedia.org/wiki/Modelo_de_Kano

Kano Analysis

		Dysfunctional Questions				
		Like	**Expect**	**Neutral**	**Live with**	**Dislike**
Functional Questions	**Like**	?	D	D	D	S
	Expect	X	I	I	I	M
	Neutral	X	I	I	I	M
	Live with	X	I	I	I	M
	Dislike	X	X	X	X	?

M = Must-Have
S = Satisfier
D = Delighter

X = Dissatisfier
I = Indifferent
? = Questionable

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Kano Analysis

		FEATURE = PRODUCT COMPARISON				
		Dysfunctional Questions				
		Like	**Expect**	**Neutral**	**Live with**	**Dislike**
Functional Questions	**Like**	?	D	D	D	S
	Expect	X	I	I	I	M
	Neutral	X	I	I	I	M
	Live with	X	I	I	I	M
	Dislike	X	X	X	X	?

M = Must-Have
S = Satisfier
D = Delighter

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Kano Analysis

FEATURE = PRODUCT COMPARISON

Functional Questions	Dysfunctional Questions: Like	Expect	Neutral	Live with	Dislike
Like	?	D	D	D	S
Expect	X	I	I	I	M
Neutral	X	I	I	I	M
Live with	X	I	I	I	M
Dislike	X	X	X	X	?

How would you feel if the site allowed you to compare products?

X = Dissatisfier
I = Indifferent
? = Questionable

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Kano Analysis

FEATURE = PRODUCT COMPARISON					
	Dysfunctional Questions				
Functional Questions	Like	Expect	Neutral	Live with	Dislike
Like	?	D	D	D	S
Expect		I	I	I	M
Neutral		I	I	I	M
Live with		I	I	I	M
Dislike		X	X	X	?

How would you feel if the site did not offer the ability to compare products?

X = Dissatisfier
I = Indifferent
? = Questionable

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Kano Analysis

FEATURE = PRODUCT COMPARISON

Functional Questions \ Dysfunctional Questions	Like	Expect	Neutral	Live with	Dislike
Like	?	D	D	D	S
Expect	X	I	I	I	**M**
Neutral	X	I	I	I	M
Live with	X	I	I	I	M
Dislike	X	X	X	X	?

M = Must-Have
S = Satisfier
D = Delighter

X = Dissatisfier
I = Indifferent
? = Questionable

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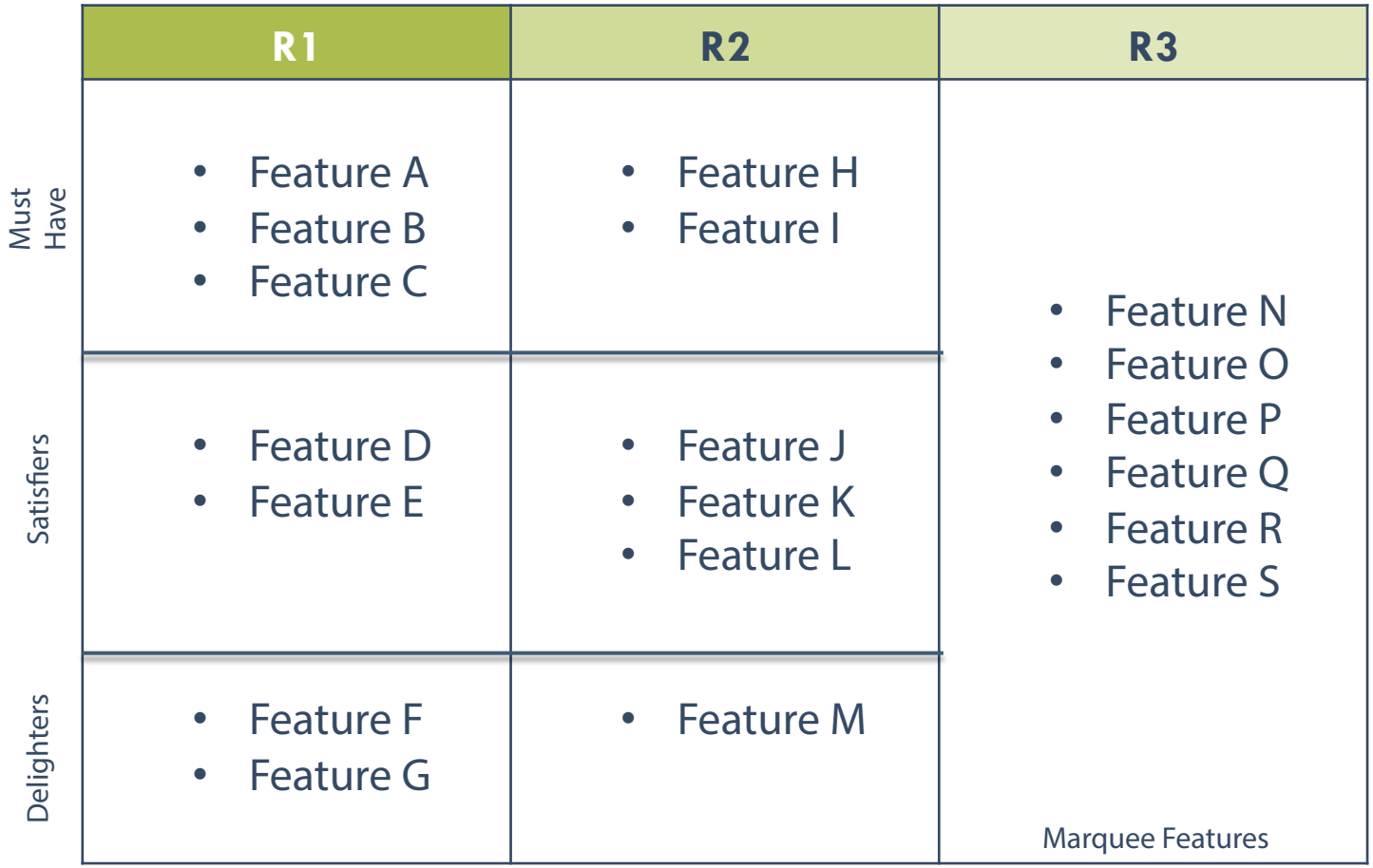
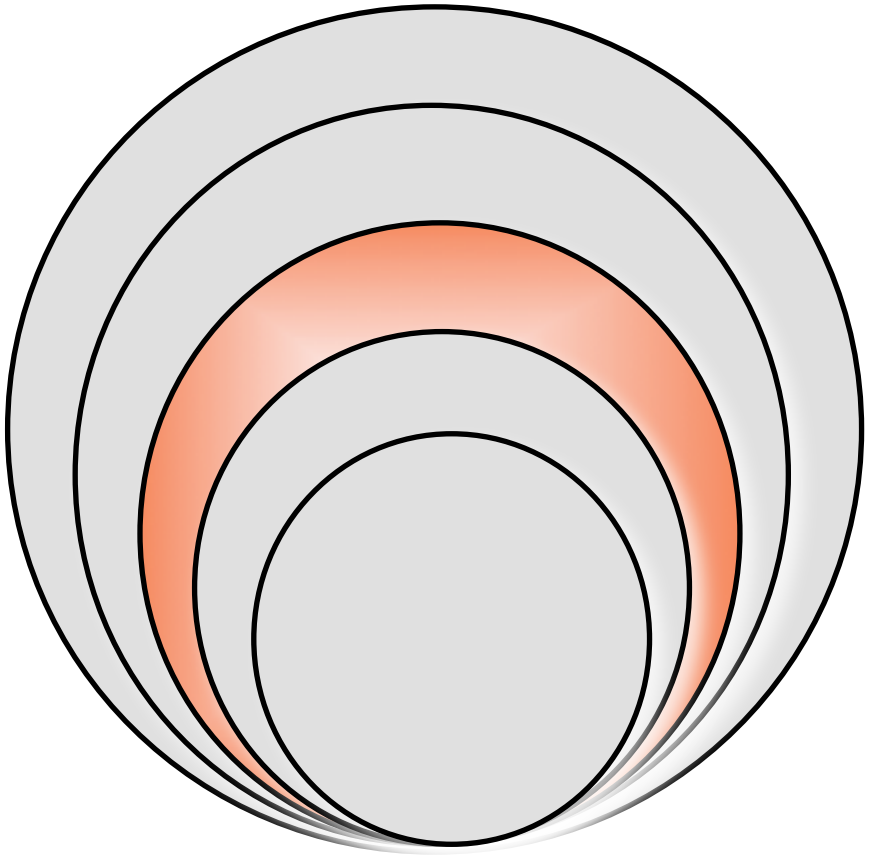
Kano on the Roadmap





6 Approach & Techniques: Release Planning

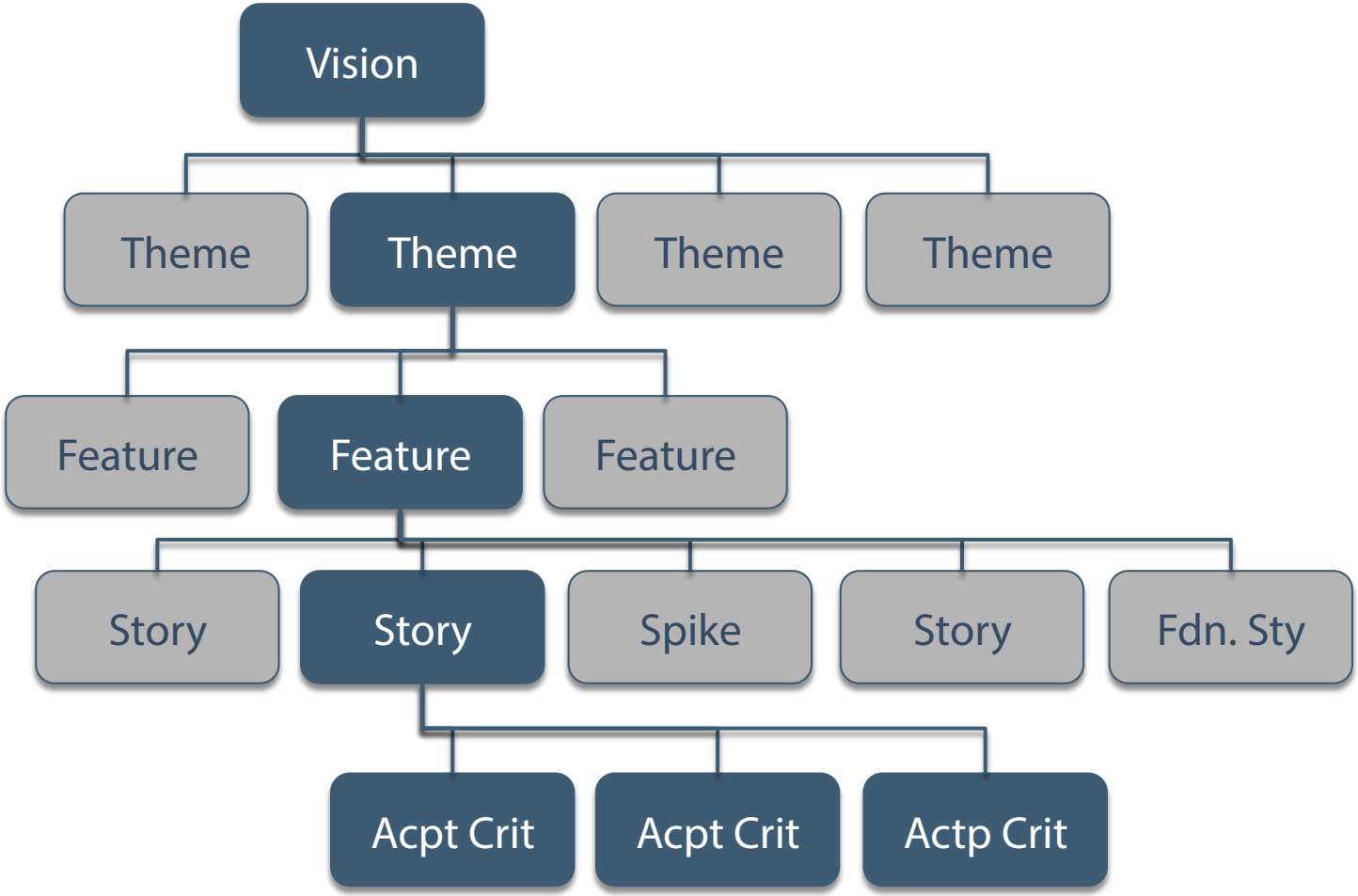
Always **accurate**, varying levels of precision

Release Plan / Sprint Forecast

A prediction of which backlog items we will complete, and when we will complete them.

S1	S2	S3	S4	S5
• Story A • Story B • Story D • Story F • Story G	• Story C • Story E • Story I • Story J	• Story H • Story K • Story L • Story O • Story P • Story Q	• Story M • Story N • Story R • Story S • Story T	• Story U • Story V • Story W • Story X

Hierarchy


Vision
Theme
Theme
Theme
Theme
Feature
Feature
Feature
Story
Story
Spike
Story
Fdn. Sty
Acpt Crit
Acpt Crit
Actp Crit

User Stories

User Roles Analysis

©2015 Leslie

Card
Conversation
Confirmation

Ron Jeffries

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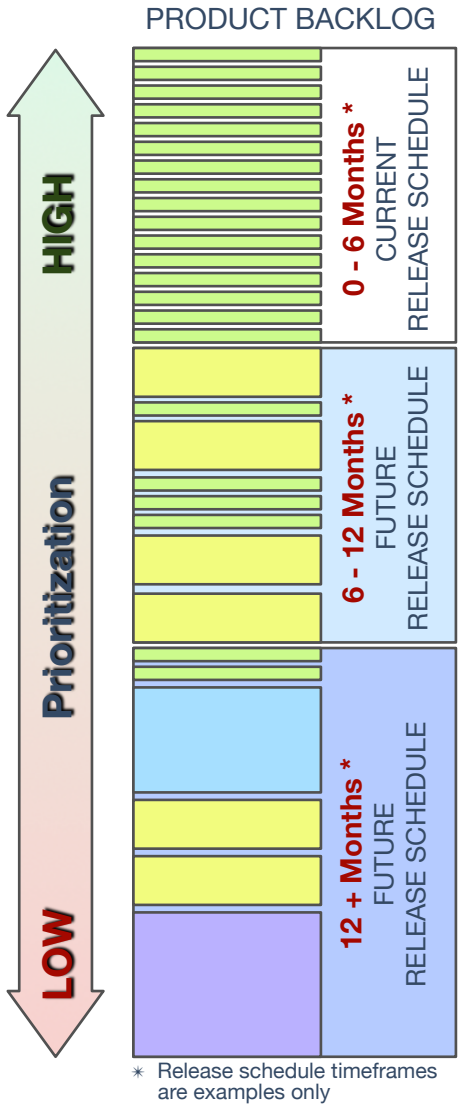

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INVEST

BILL WAKE

Independent
Negotiable
Valuable
Estimable
Sized appropriately
Testable

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Backlogs have more…

Foundation stories

Spikes

Defects

Nonfunctional Reqts

Story Mapping

View Product	Add to Subscriptions	Manage Subscription Preferences	Subscription Delivery Initiated
1.Subscription Available 2.Subscription Pricing	1.Subscribe for Item 2.Quick-Set Frequency 3.Quick-Set Next Delivery	1.View Subscriptions 2.Cancel Subscription	1.Delivery Coming Soon 2.Delivery Sent Notification 3.Delivery Confirmation
3.Subscription Promotions 4.Subscription Item Search		3.Change Frequency 4.Change Payment Details 5.Change Delivery Address	
		6.Change Delivery Date 7.Group Subscriptions 8.Set Subscription Defaults	

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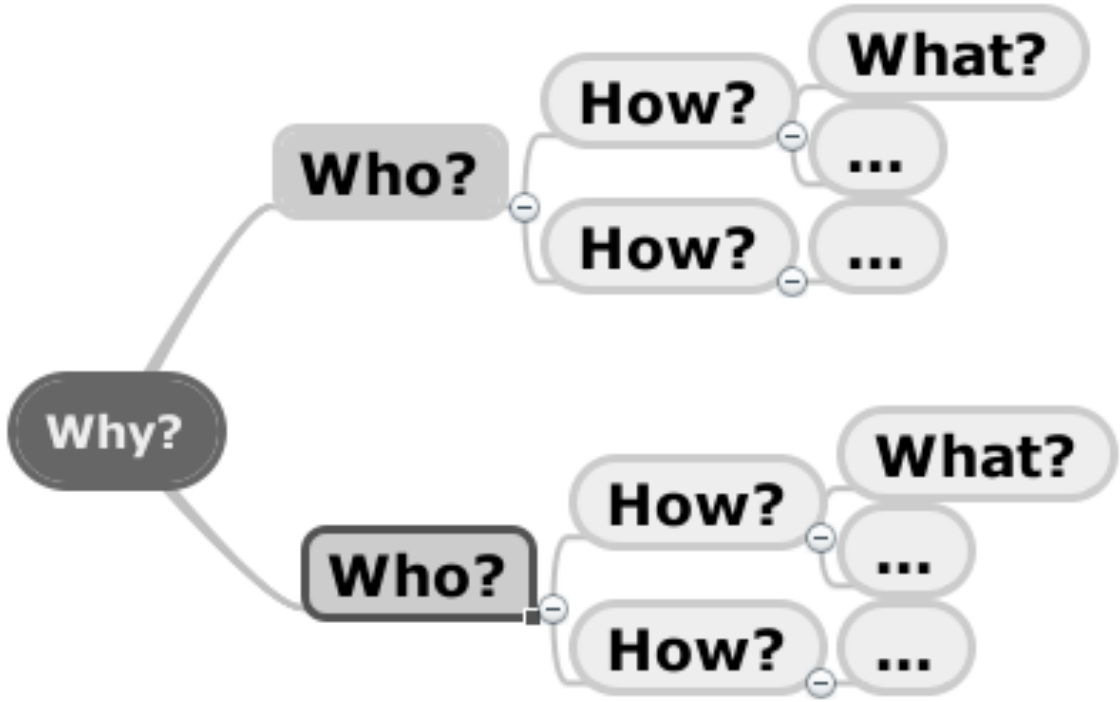
Impact Mapping

GOAL



http://www.impactmapping.org/drawing.php

The 7 Product Dimensions

User	Interface	Action	Data	Control	Environment	Quality Attribute
Users interact with the product	The product connects to users, systems, and devices	The product provides capabilities for users	The product includes a repository of data and useful information	The product enforces constraints	The product conforms to physical properties and technology platforms	The product has certain properties that qualify its operation and development

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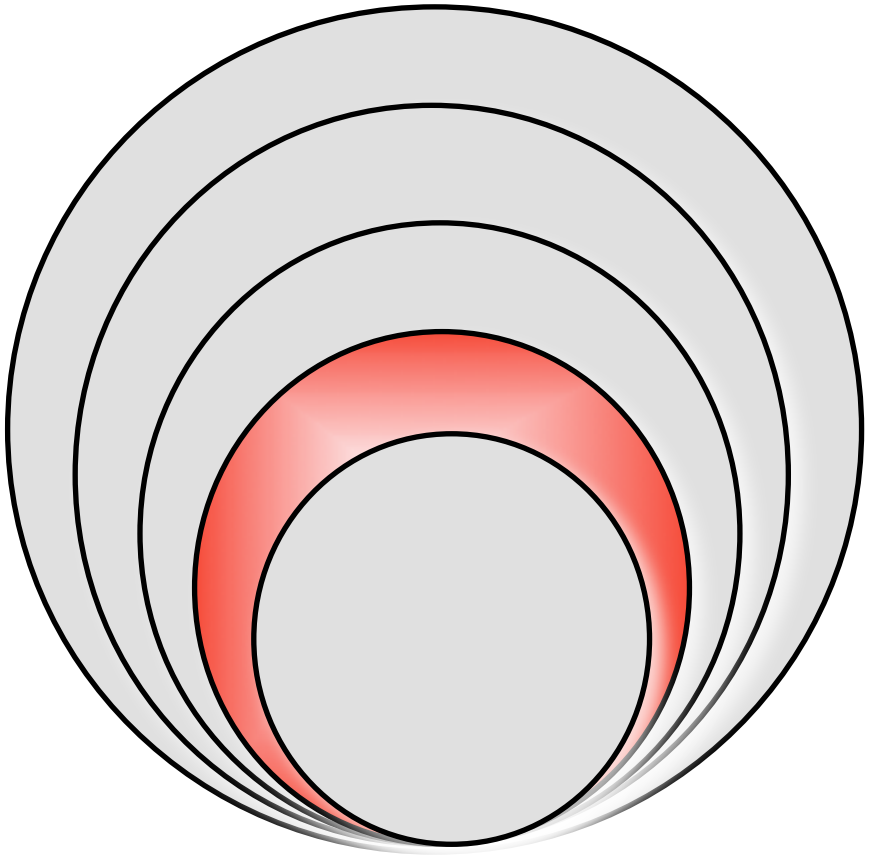

4

Approach & Techniques: Increment Planning

Always **accurate**, varying levels of precision

User Stories are…

not enough.

User Stories lack…

all preconditions

all actor actions

all system responses

?
30%
15%
7%
48 %
Analysis

use cases

versus

user stories

Given [context]
When [event occurs]
Then [outcome]

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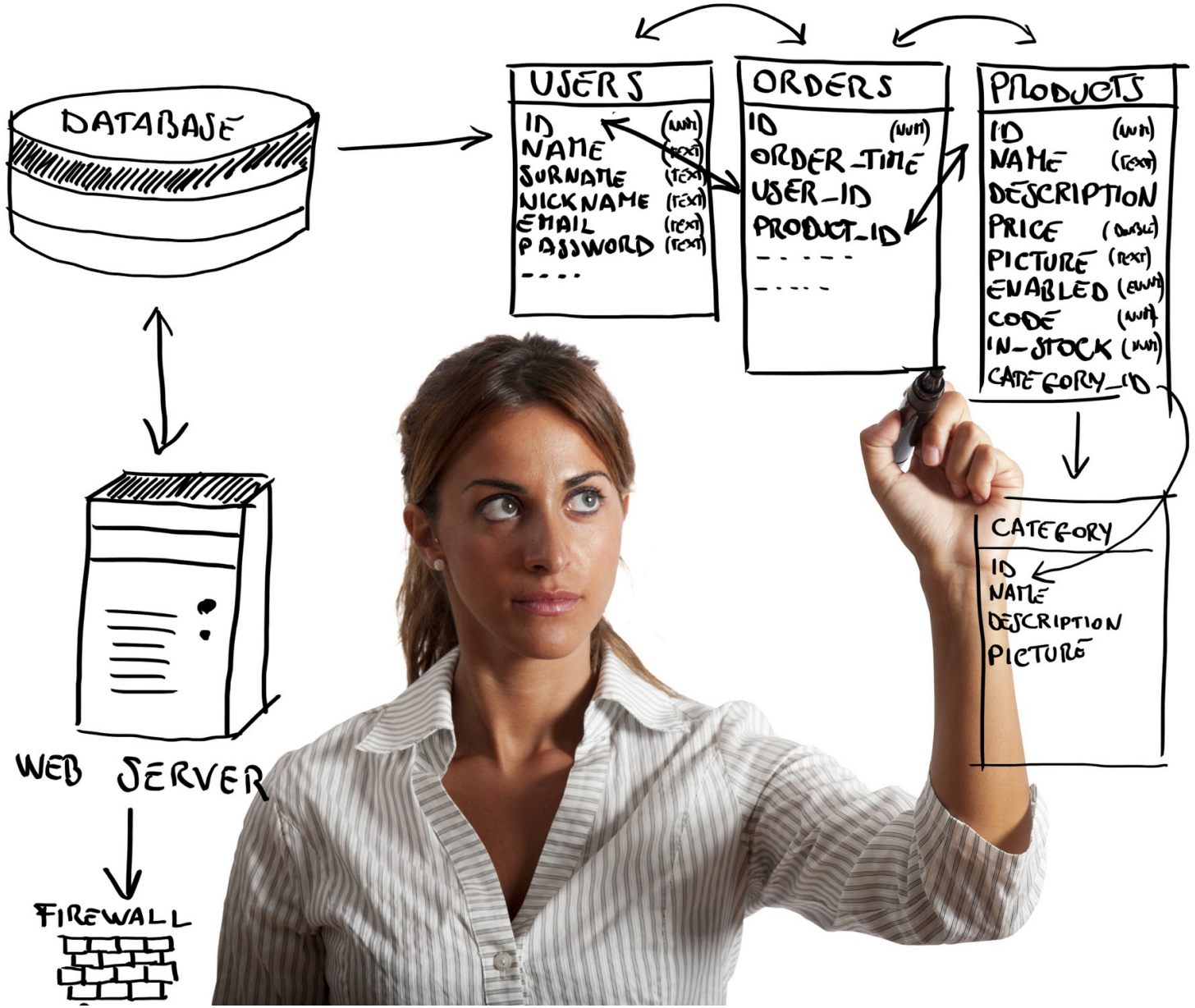
Given [a shopper is not logged in]

When [they proceed to checkout]

Then [they are prompted to create an account]


DATABASE
USERS
ID
NAME
SURNAME
NICKNAME
EMAIL
PASSWORD
ORDERS
ID
ORDER_TIME
USER_ID
PRODUCT_ID
PRODUCTS
ID
NAME
DESCRIPTION
PRICE
PICTURE
ENABLED
CODE
IN_STOCK
CATEGORY_ID
CATEGORY
ID
NAME
DESCRIPTION
PICTURE
WEB SERVER
FIREWALL

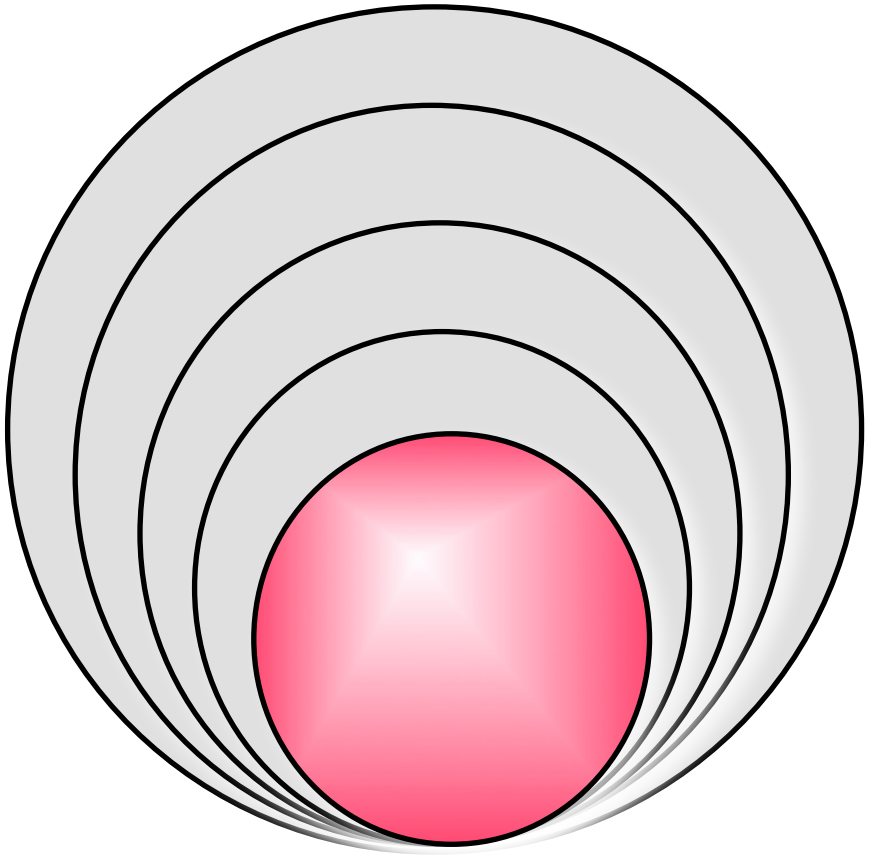
Definition of Ready

Shared Understanding

Sized Correctly

Know "Enough"

Dependencies Fulfilled



2 Approach & Techniques: Daily Planning

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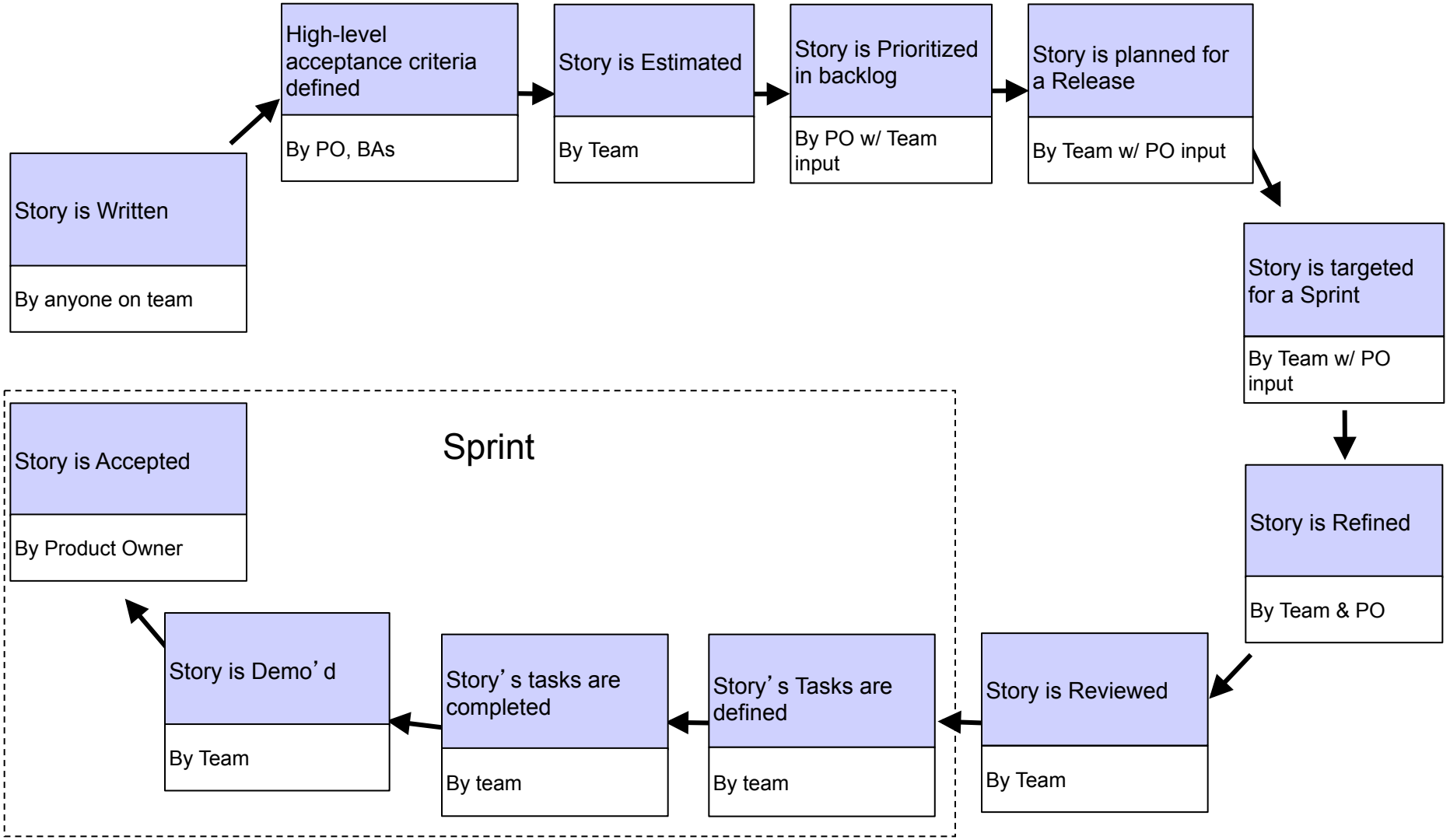

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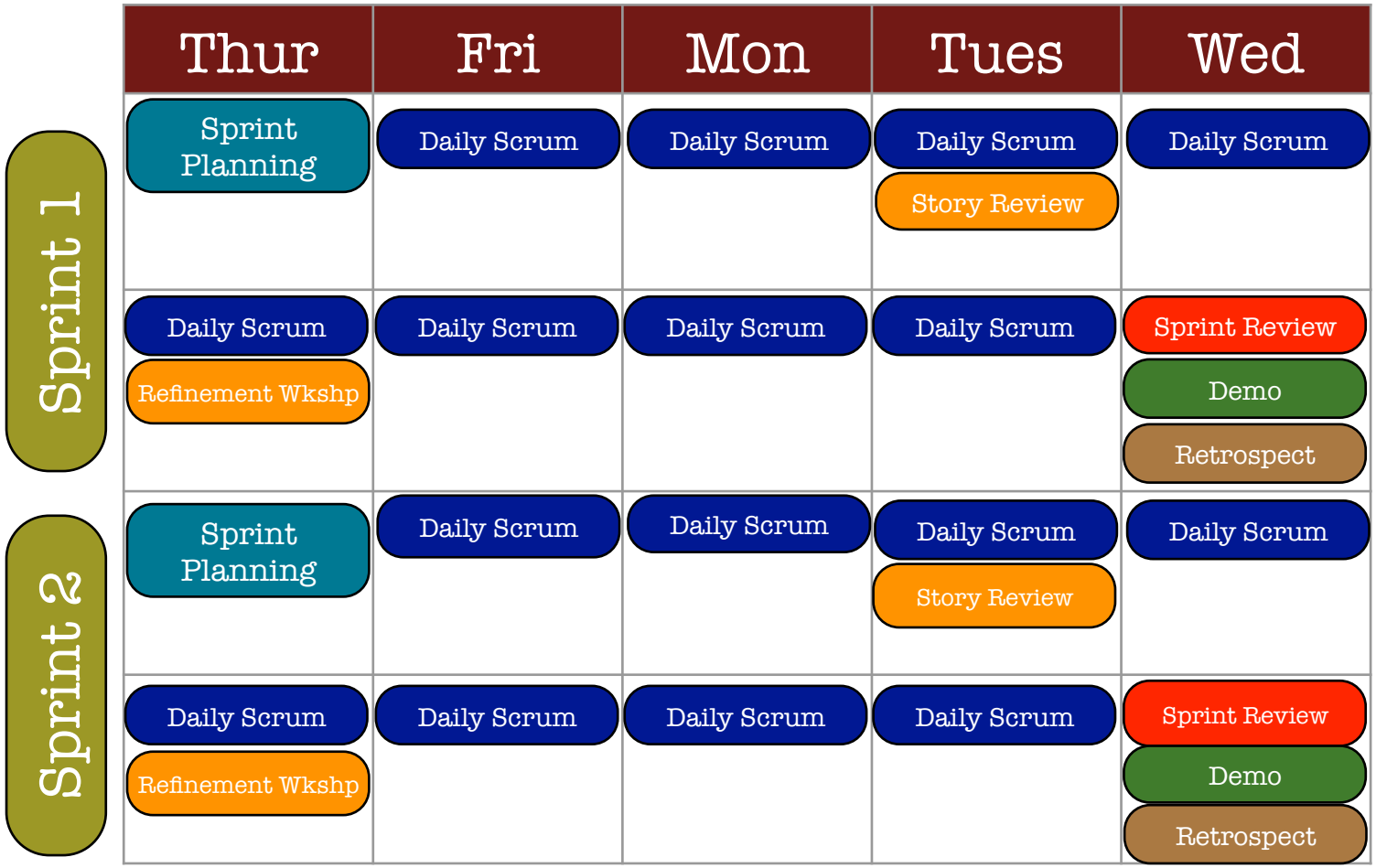

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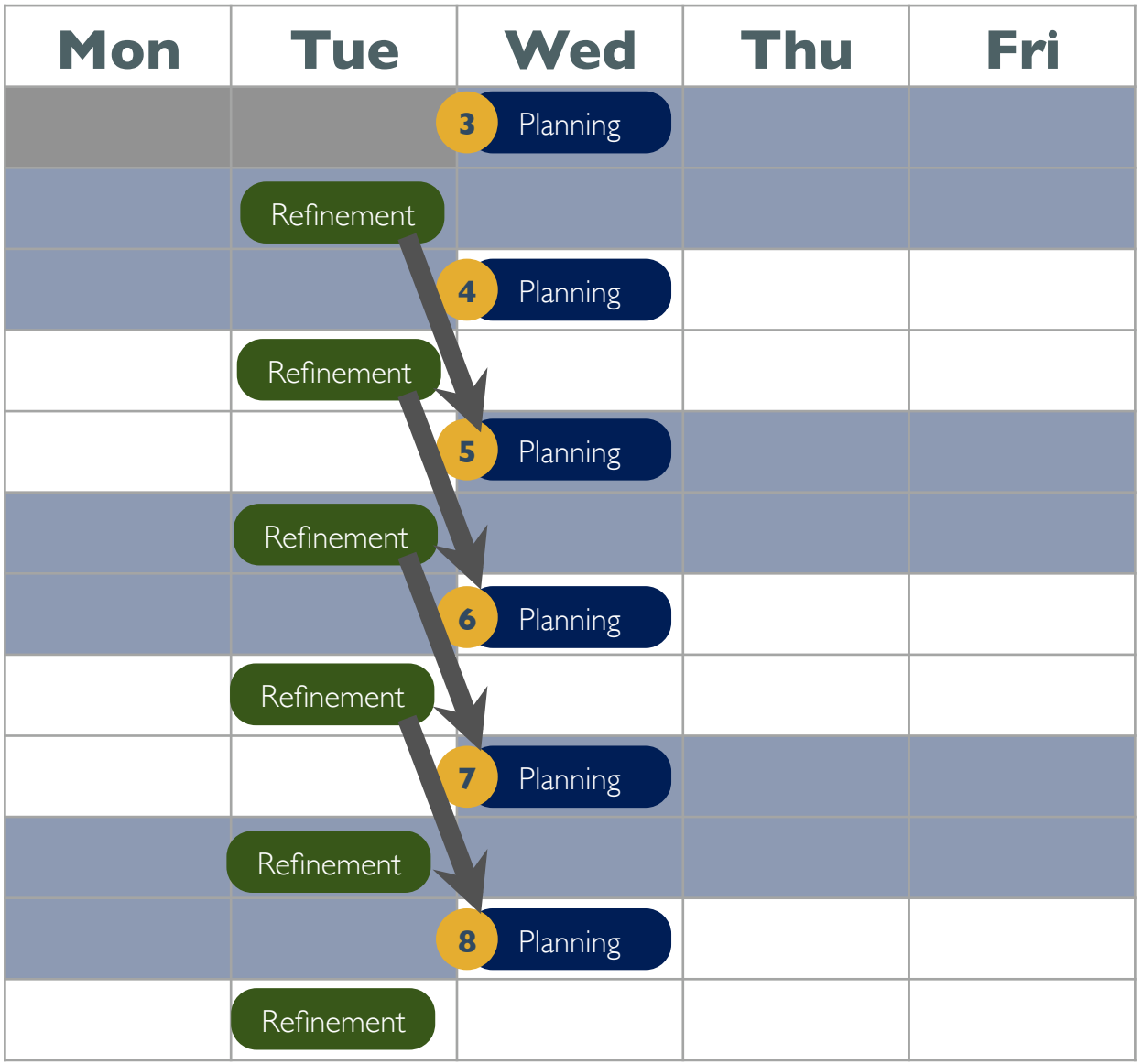

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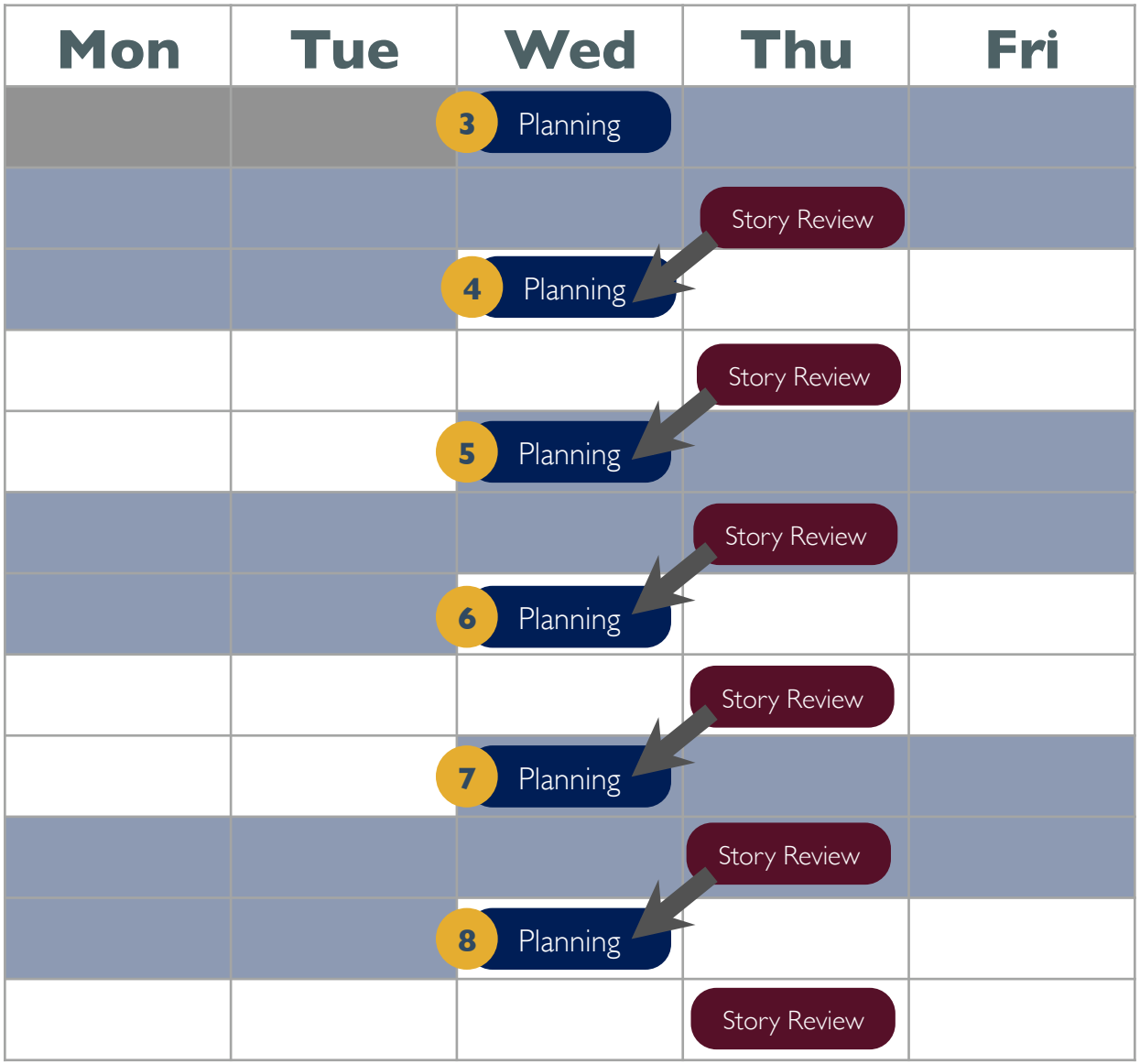

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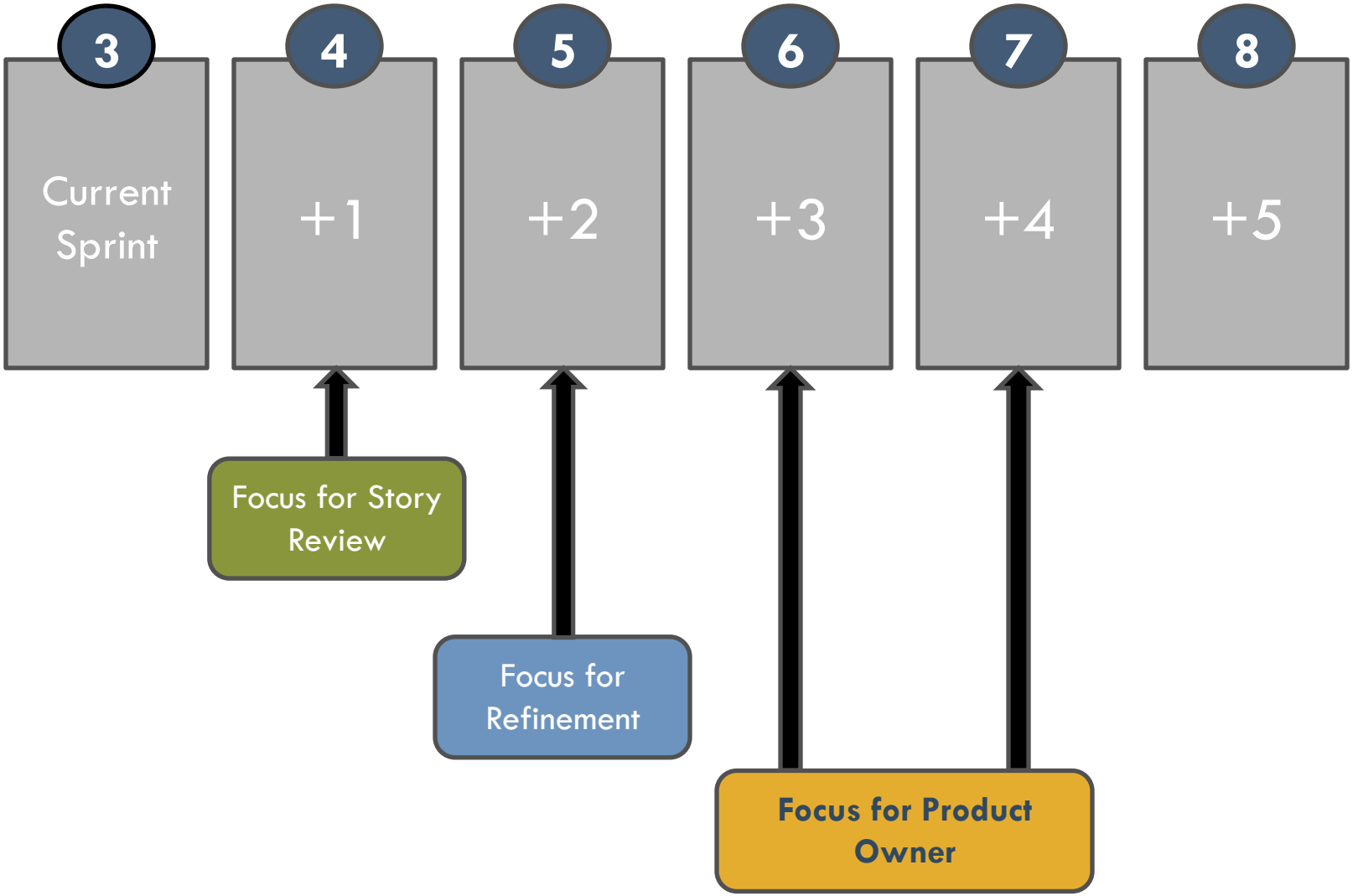

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3 Potential Pitfalls

Short Term
work products

Long Term
deliverables

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