Agile Release Planning by Example

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  - Both as an employee and consultant
  - From small startups to large multinationals
  - Trained and coached ~200 Scrum teams
- Background in Process Improvement, Technology Project Management, and Organizational Change
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- Consultant and Agile Coach at SolutionsIQ
- Experienced ScrumMaster and facilitator
- Led two-year effort with corporate PMO to enable agile adoption for 14+ teams
- Background in IT Project Management, Process Analysis, Management
- Scrum Alliance Certified Scrum Professional
- Certified Six Sigma Green Belt
- PMI Certified – PMP
Putting it together

- Purpose
- Outcome
- Roles
- Tracking
- Why do it?
- Preparation
- Feels Like
- Timing
Putting it together
Release Planning

Expect something different:

• An event, not a meeting
• Will seem chaotic at times
• May seem slow at other times
• There is a “method to the madness”
Release Planning Is Important

• Conveys expectations about what is likely to be developed and in what timeframe
  – Feeds into other strategic planning activities
• Helps the Product Owner and whole Team to determine how much **MUST** be developed, and how long that will take before they have a releasable product
• Serves as a guidepost towards which the project team can progress
  – Allows iterations to combine into a satisfying “whole”
  – Shows a team’s current expectation of what is probable
What Are The Goals?

• Resolve discrepancies between the product roadmap (top down) with a team commitment (bottom up) on what they can deliver in a release
• Extend visibility past a single sprint, so executives can make informed budget and schedule decisions
• Give Scrum teams a chance to understand the complete set of functionality in the product
• As a forcing function
Exit Criteria for Agile Release Planning

Create a Release Plan that provides the information:

• For us to be able to agree, and to make and update our commitments
• For external teams to understand our needs, goals and objectives
• For risk factors to be identified
• So that the organization can make informed decisions in support of our plan
What Will We Have When We Are Done?

- Backlog readiness
- Team better comprehends the whole
- Shared understanding of what it takes to release
- The start of an ongoing conversation between teams, management and stakeholders
- Actions needed to solidify the plan
- Baseline that has confidence of stakeholders because of the inclusive approach used to define it
- Collective ownership of a plan and the need to re-plan and to communicate
When to Do Release Planning?

• When do teams have a release planning meeting?
  – Whenever you need greater than one sprint’s worth of visibility into your project plan
  – After you’ve established your velocity, typically after 3-4 sprints
  – Will take 1-2 days to conduct, and maybe 2 weeks to prepare for
  – Ideally preparations begin 1-2 months in advance
Iterative Planning Cycle

Plan or Update (Release Plan)

Do (Sprint)

Check (progress vs. plan)

Act (inform &/or escalate)

Release?

Adapted from Deming Cycle.
Considerations

• What is the purpose you hope to accomplish with Agile release planning?
• Do you have a release theme or themes?
• What is the current state of the team?
• Do you have a velocity?
• Do you have a good Definition of Done?
• Do you have a Product Backlog?
• Is the Product Backlog Prioritized by the Product Owner?
• Is the Product Backlog Estimated by the whole team?
• Will the Product Owner(s) and whole team be in attendance?
• Will key members be in attendance (Architects, Operations, QA, Product Marketing, PMO, etc)?
• What have I not asked that is important to know?
Preparing the Backlog
Product Vision

• Essential for teams to be able to see the forest for the trees
  – At least one vision for the product
  – Also, where teams are delivering together, they may develop specific vision statements

• Helps when making tradeoff decisions later in the meeting.

Adapted from Elevator Statement in Geoffrey A. Moore’s "Crossing the Chasm"
Product Roadmap

- Represents the vision along a time-scale
  - This is mid-range planning—a year at most.
- Considers the team(s) that will be doing the work
- Organizes themes of features
- Updated 3-4 times per year
Trade-Off Matrix

- What is the critical aspect of the release?
- Work with project stakeholders to:
  - Choose one row as fixed
  - And then one row as firm
  - All else as flexible

Jim Highsmith, “Agile Project Management”
Meeting Purpose

• Is the “acceptance test” for your meeting
• When it is met, you are done

MEETING PURPOSE

CREATE A RELEASE PLAN WITH
SUFFICIENT INFORMATION ABOUT
EXPECTATIONS FROM THE PRODUCT
OWNER AND OTHER TEAMS SO WE
UNDERSTAND DEPENDENCIES,
CAN COMMUNICATE PROGRESS
AGAINST A HIGH-QUALITY “DEFINITION
OF DONE” TO OTHER TEAMS,
AND CAN MAKE AND SCHEDULE
INFORMED BUDGET DECISIONS
IN SUPPORT OF OUR PLAN
Agenda

• Sets the stage for collaboration
• Agenda is created based on earlier meetings with key participants in support of the meeting purpose
Working Agreement

- Guides the group for successful collaboration
- Often the first opportunity larger groups have to create a collaborative environment
Team Forecasts Velocity

- Historical data is used
  - Team specific
- Be realistic, not optimistic
- Helps to first review the Definition of Done

![Project B Velocity Chart](image)
Who Attends Release Planning?

• Should be: Anyone who needs to be there who has critical information or could potentially torpedo the plan

• Who Needs to Attend?
  – Scrum Team
  – Product Owner
  – Sponsor(s)
  – Management
  – Subject matter experts
  – Architects
  – OPS
  – QA...

Ask: “Who do we need to achieve commitment and decisions?”
How Does Release Planning Fit in a Larger Planning Context?

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**Responsible ( R )**
The individual charged with accomplishing the task. This person has primary responsibility for completing the task.

**Accountable ( A )**
The individual ultimately accountable for verifying completion of the task. The buck stops with this person.

**Consulted ( C )**
A key contributor to the successful completion of the task. This person may have a vested interest or a specific expertise.

**Informed ( I )**
A stakeholder or participant who should be kept informed about events related to the task.
You Can’t Prep for Everything

• Additional work will emerge during the event
  – Missing Stories
  – Acceptance Criteria
  – Estimates

• Solutions will be created with minimal delays by the people at the event

• Prepare to be surprised
  – If the group is large, don’t facilitate alone

• Politics often emerge
  – Best to take care of this in advance

• You can prep to have subject matter experts available with short notice

• You can prep to have the best supplies
Opening the Meeting

- Welcome participants
  - May include Executive Leadership comments
- Review meeting purpose
  - Why are we here?
  - How to know we are done?
- Review Agenda and Schedule
  - Walk the room, logistics
- Review working agreement
Team Reviews Definition of Done

Feels Like
Group Identifies Key Dates

- Start with a “work-back” schedule
- Don’t forget about holidays
Organizing the Backlog(s)

• Line up stories along the wall in priority order
• Clarify acceptance criteria
• Confirm velocity

Note: stories need to be estimated, printed and prioritized before the teams get to this meeting
Product Owner and Team members discuss acceptance criteria
Identifying (Potential) Sprint Boundaries

Line up stories in priority order. Mark sprints by forecasted velocity.
Implications Emerge

• You will have stories that do not fit in the release plan
  – Fail fast

• We see reality vs. plan conversations take place amongst all participants
  – These conversations may be difficult to have

• As a team, the business and development team needs to make tradeoff decisions about these stories
Combine Release Plans with Separate Work Streams

Feels Like

Team A

Team B: Depends on Team A

Team C: Depends on Team A

Sprint Boundary
Single Team: Final Backlog

Feels Like
Multi Team: Final Backlog
Issues and Risks

- Record the issues
- Record the risks
- Make an action plan to address the high probability and high risk items
Decisions Made

• Create a list of decisions that have been made
• Useful to revisit later when there is doubt
Action Items

- Collect Action Items
- Assign Owners
- Decide when they are due
- Assign who will follow up and when with these actions
Seek Team Commitment
Closing: Walking the Walls

• Clear the Parking Lot
• Identify Action Items
• Review Decisions Made
• Make a communication plan for those not in the meeting
• Create a Forum/Mechanism for Maintaining the Release Plan
• Close
  – Have a short meeting retrospective to help your next large meeting
Communication Plan

Feels Like
Retrospective on the Meeting

- Can help future meetings of this size
- Congratulate everyone on a successful meeting!
Maintaining the Release Plan

- Uncertainty continues to exist that results in impacts to the plan
- Metrics and charts to track release progress
- Agile planning is about making and updating commitments
- Transparency can lead to improved trust
- MetaScrum – a forum for decisions and communication re: changes in releases/planning
Tracking to the Release Plan (sample)
# How to Support Release Planning

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<tr>
<th>Roles</th>
<th>Teams</th>
<th>Product Owner</th>
<th>Management</th>
<th>All Participants</th>
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</table>
|       | • Collaborate with the Product Owner on activities in the room  
|       | • “Pull” help from management for information and directions | • Collaborate with your teams on the work in the room  
|       |                          | • Seek to understand the coming challenges  
|       |                          | • Collaborate with management to see how this release connects to the business strategy | • Observe how the teams interact / work when face to face  
|       |                          |                          | • Watch body language  
|       |                          |                          | • Seek to understand the coming challenges | • Trust yourself and others in the room that we are working toward a united goal  
|       |                          |                          |                          | • Accept coaching feedback from the facilitator  
|       |                          |                          |                          | • Make a plan everyone can own  
|       |                          |                          |                          | • Look for early release opportunities |
Questions?
Appendix: Resources and Tools

• Chapter 13 in Mike Cohn’s book “Agile Estimating and Planning”

• “Establishing Transparency with Meta-Scrum: How to maintain top-to-bottom transparency from roadmap to release plan with Scrum”