

Chapter 1 : Hierarchical Levels of Strategy

Planning is vital to the continued success of small businesses. Business planning is performed at various levels in an organization, often in a hierarchical fashion, with each level drafting plans.

Levels and Stages of Planning Levels and Stages of Planning Levels of Planning In management theory, it is usual to consider that there are three basic levels of planning , though in practice there may be more than three levels of management and to an extent, there will be some overlapping of planning operations. The three levels of planning are discussed below: It encompasses the long-range objectives and policies or organisation and is concerned with corporate results rather than sectional objectives. Top level planning is entirely long-range and inextricably linked with long-term objectives. It deals with development of resources to the best advantage. It is concerned mainly, not exclusively, with long-range planning, but its nature is such that the time spans are usually shorter than those of strategic planning. It is, in fact, oriented to functions and departments rather than to the organisation as a whole. It is confined to putting into effect the tactical or departmental plans. It is usually for a short-term and may be revised quite often to be in tune with the tactical planning. But following are the common steps: In other words first of all objectives will be fixed and then we will make plan regarding how to gets success in achievement of such predetermine objective. While making plan and setting objectives management should make analysis of internal resources available with the business and arrangement of external resources, external environments and corrective measures to face with the environment. List of alternatives to achieve the objective: So business should prepare a list of such ways by considering the merits and demerits of each for which ever is better should be adopted. Considering the merits and demerits of each alternative is also termed as development of premises of each alternative. Choose the best alternative: Formulation of supporting plans: Put the plans into action: In the main time management should see whether we are going towards achievement of objective or not. There may be some changes required before reaching the objective.

Chapter 2 : Levels and Stages of Planning

the second level, functional planning is undertaken for sub-functions within each major function. STRATEGIC PLANNING Strategic Planning is Deciding on objectives of the organization, Deciding on changes on these objectives, deciding on the resources used to attain these objectives, policies that are to manage the acquisition, use and.

June 25, by Kasia Mikoluk Planning is the part of management concerned with creating procedures, rules and guidelines for achieving a stated objective. Planning is carried out at both the macro and micro level. Managers need to create broad objectives and mission statements as well as look after the day to day running of the company. Below, we take a look at the three types of plans in management and how they are used within an organizational framework: Strategic Plan A strategic plan is a high-level overview of the entire business, its vision, objectives, and value. This plan is the foundational basis of the organization and will dictate decisions in the long-term. The scope of the plan can be two, three, five, or even ten years. Managers at every level will turn to the strategic plan to guide their decisions. It will also influence the culture within an organization and how it interacts with customers and the media. Thus, the strategic plan must be forward looking, robust but flexible, with a keen focus on accommodating future growth. The crucial components of a strategic plan are: Vision Where does the organization want to be five years from now? How does it want to influence the world? If there is any room to wax poetic within a plan, it is here. Why does the company exist? What does it aim to achieve through its existence? Like Fab, each organization has its own values. These values will guide managers and influence the kind of employees you hire. There is no template to follow when jotting down the values. As you can see, there are really no rules to writing the perfect strategic plan. This is an open-ended, living document that grows with the organization. You can write whatever you want in it, as long as it dictates the future of your organization. Tactical Plan The tactical plan describes the tactics the organization plans to use to achieve the ambitions outlined in the strategic plan. It is a short range i. Creating tactical plans is usually handled by mid-level managers. That said, there are some components shared by most tactical plans: The tactical plan will break down this broad ambition into smaller, actionable goals. Budgets The tactical plan should list budgetary requirements to achieve the aims specified in the strategic plan. This should include the budget for hiring personnel, marketing, sourcing, manufacturing, and running the day-to-day operations of the company. This should include human resources, IP, cash resources, etc. Again, being highly specific is encouraged. Their scope should be aligned with the goals outlined above. Operational Plan The operational plan describes the day to day running of the company. The operational plan charts out a roadmap to achieve the tactical goals within a realistic timeframe. This plan is highly specific with an emphasis on short-term objectives. Creating the operational plan is the responsibility of low-level managers and supervisors. Operational plans can be either single use, or ongoing, as described below: This can be a one-time sales program, a marketing campaign, a recruitment drive, etc. Single use plans tend to be highly specific. Ongoing Plans These plans can be used in multiple settings on an ongoing basis. Ongoing plans can be of different types, such as: A policy is a general document that dictates how managers should approach a problem. It influences decision making at the micro level. Specific plans on hiring employees, terminating contractors, etc. Rules are specific regulations according to which an organization functions. The rules are meant to be hard coded and should be enforced stringently. A procedure describes a step-by-step process to accomplish a particular objective. These guidelines can be called procedures. Ongoing plans are created on an ad-hoc basis but can be repeated and changed as required. This is where the macro meets the micro. Running a successful company requires paying an equal attention to now just the broad objectives, but also how the objectives are being met on an everyday basis, hence the need for such intricate planning.

Chapter 3 : Multiple Levels of Planning | Agile Certified Practitioner (PMI-ACP)

Strategic plans, provided by top-level managers, serve as the framework for lower-level planning. Tommy is a top-level manager for Nino's Pizzeria. As a top-level manager, Tommy must use strategic.

Reduce staff turnover in call centre because of customer satisfaction The goals of the project are expressed against the strategic drivers, there should only be one primary driver and there might be a number of secondary or tertiary goals. Preparing this as a group activity helps the team to understand the clear and explicit focus for the project. Sliders A tool for showing the priorities for the team across multiple dimensions. The sliders range from Fully On to Fully Off – if an element is On then it will be the strongest factor that drives the decision making as the project continues. Where there is little leeway in the project sliders then the choice becomes deliver everything or deliver nothing, whereas more leeway allows for partial delivery that contributes to the organisations goals. Where something is explicitly out of scope the team will not spend any time or effort on this component. The team will not work on his piece and the product owner or project manager needs to investigate further to identify if the piece of work is in or out of scope. Early in the project the costs will have a large Cone of Uncertainty [5] and as the project progresses this will get narrower and narrower. It is likely that the benefits also have a wide range of uncertainty. Uncertainty in both costs and benefits is not necessarily a problem on a project provided the range is correct. Both costs and benefits should be shown at three levels – optimistic, likely and pessimistic. The figure in each cell is the net of benefit minus the cost. This project should be considered high risk, as there is a distinct possibility that the organisation will lose money on it. There might be other drivers which warrant the investment and the reward profile if things go well is significant. Articulate the Vision These tools can help teams gain a clear understanding of the goals and objectives that have driven the selection of this project to be worked on. Preparing the product vision is a very important starting point for the project. This provides the focus for the work the team will undertake as the project continues. The wallware [6] artefacts produced during the workshop s should form part of the team environment so anyone working on the project can see at a glance the project drivers and goals. It may also be valuable to produce a formal document that summarises the product vision. Remember that the value lies only partly in the document but in the shared understanding that the team has achieved in producing the vision. Team members who join after the vision has been created need to be walked through the project charter by someone who was present at the workshop s to help them understand the drivers behind the work being undertaken. Stewardship of the product vision is the responsibility of the product owner – the person who brings the business need to the project team. Changes in the product vision are frequently evidence of massive change in the organisation ecosystem. The Product Roadmap The product roadmap is a list of the key features and characteristics that the product will need to deliver in order to achieve the vision. The product roadmap is important where the project spans a number of releases of the product. If there is only a single release then the product roadmap and the release plan could be the same thing. The product roadmap is a time-based view of the anticipated delivery lifecycle of the product. It is a high-level plan maintained by the product owner and project manager that is expected to change over time. The product roadmap is regularly validated against the product vision and is used to convey to the team and the outside world the likely release schedule for components of the product. The product roadmap is at the level of features and epics – user stories are not included. A product roadmap should be expressed as a big visible chart that shows important milestones, features and target release dates. As changes are made items are added, moved and removed from the roadmap. The picture below is an example of a product roadmap from a real project, showing two releases over a six month period: Image credit - Livestock Improvement Corporation , New Zealand This roadmap is on the passage in the team environment and acts as an information radiator for all the teams who are working on the program of work, and for anyone else who is interested in the project. The product roadmap provides a context for the teams working on a single release. The Release Plan The release plan shows the features that are to be delivered in the current release of the product. It contains the currently agreed prioritised list of features at the level of epics and stories. The initial release planning activity

is undertaken by the team with the product owner providing the goals for the current release. A release consists of a number of iterations during which the team will undertake work to deliver a set of features that deliver measurable value to the organisation. The set of features and capabilities make up the release criteria – the subset of overall product functionality and capability that is to be delivered in this release. Stories and epics need to be sized in story points [7] or ideal days and prioritised so that the work can be allocated to iterations. Release planning starts with the product owner explaining the goals for the release. The team discusses what is needed to deliver against these goals and expresses any other factors that need to be taken into account when delivering the release. Other factors can include risk and dependency between epics and stories. Dependencies might impact the sequence of delivery if we do this piece first then that piece will be easier to do later. If this is the first release then the velocity needs to be estimated, for subsequent releases then the actual velocity from the previous release should be used unless the team changes significantly between releases. Identifying the estimated velocity is initially a guess – the more accurate the guess needs to be the longer it will take to come to the answer. The simplest approach is to ask the team how many story points they think they can deliver in an iteration and plan based on that number. It will probably be wrong, but it could be a good enough starting point. Once you have the estimated velocity this can be used to plan the iterations as follows: This process can be seen as a flowchart: The release plan is an adaptive plan – it WILL change as the project progresses. Once the release plan has been produced and agreed to it is used to guide the work in the iterations. The release plan is also used to produce the initial target velocity graph for the project. The Iteration Plan At the beginning of every iteration the team is able to completely replan the project based on what has been learned from the work done so far, and changes to the broader project environment. The iteration planning session has two primary activities: Validating and updating the release plan and Making the iteration plan for the current iteration. The first activity is to examine the current release plan and update it based on any changes that have happened since the last update. The beginning of iterations is where an Agile project adapts – changes are made to the plan based around the actuality of the project environment. Specific things that impact the revised release plan are: The product owner explains the current priorities and the reason behind the changes, to ensure that the whole team has a clear understanding of why priorities have changed. Once the list of stories and epics has been reprioritised and everyone on the team understands the revised release plan, the team builds the detailed iteration plan for the work to be done in this iteration. They then pick the stories to be worked on for the iteration based on the capacity to deliver work. Tasks should be very small – from a few hours to a day or so, and are discrete measurable activities. The iteration manager Scrum Master in Scrum confirms that all the tasks are allocated and performs a sanity check on the work being committed to – is it likely that the team will be able to deliver what they are committing to given the reality of the project environment? Once tasks have been identified the team members sequence and estimate them. Estimation is now at the level of hours of work needed to undertake a single task. These tasks could then be written up on task cards and the task cards tracked on the storywall. Tasks are linked to stories, and tracking a story from one state to the next on the storywall should be accompanied by the completion of the task for that activity. Tasks include every piece of work needed to complete the stories in the iteration, and to start preparing for the next iteration. The Iteration Backlog is the list of stories and epics which will be tracked on the story wall for this iteration. An example of a partial list of tasks is shown below:

Chapter 4 : Scaling Agile Processes: Five Levels of Planning

Management Planning- Boeing Management Planning- The Boeing Company The Boeing Company was developed in by William Boeing and has been in existence for over 90 years. "Boeing is the world's leading aerospace company and the largest manufacturer of commercial jetliners and military aircraft combined."

While strategy may be about competing and surviving as a firm, one can argue that products, not corporations compete, and products are developed by business units. The role of the corporation then is to manage its business units and products so that each is competitive and so that each contributes to corporate purposes. Textron has four core business segments: While the corporation must manage its portfolio of businesses to grow and survive, the success of a diversified firm depends upon its ability to manage each of its product lines. While there is no single competitor to Textron, we can talk about the competitors and strategy of each of its business units. In the finance business segment, for example, the chief rivals are major banks providing commercial financing. Many managers consider the business level to be the proper focus for strategic planning. Corporate Level Strategy Corporate level strategy fundamentally is concerned with the selection of businesses in which the company should compete and with the development and coordination of that portfolio of businesses. Corporate level strategy is concerned with: Reach - defining the issues that are corporate responsibilities; these might include identifying the overall goals of the corporation, the types of businesses in which the corporation should be involved, and the way in which businesses will be integrated and managed. Competitive Contact - defining where in the corporation competition is to be localized. Take the case of insurance: The conglomerate Textron was not. For Textron, competition in the insurance markets took place specifically at the business unit level, through its subsidiary, Paul Revere. Textron divested itself of The Paul Revere Corporation in Igor Ansoff introduced the concept of synergy to corporate strategy. Management Practices - Corporations decide how business units are to be governed: Corporations are responsible for creating value through their businesses. They do so by managing their portfolio of businesses, ensuring that the businesses are successful over the long-term, developing business units, and sometimes ensuring that each business is compatible with others in the portfolio. Business Unit Level Strategy A strategic business unit may be a division, product line, or other profit center that can be planned independently from the other business units of the firm. At the business unit level, the strategic issues are less about the coordination of operating units and more about developing and sustaining a competitive advantage for the goods and services that are produced. At the business level, the strategy formulation phase deals with: Michael Porter identified three generic strategies cost leadership, differentiation, and focus that can be implemented at the business unit level to create a competitive advantage and defend against the adverse effects of the five forces. Functional Level Strategy The functional level of the organization is the level of the operating divisions and departments. The strategic issues at the functional level are related to business processes and the value chain. Functional units of an organization are involved in higher level strategies by providing input into the business unit level and corporate level strategy, such as providing information on resources and capabilities on which the higher level strategies can be based. Once the higher-level strategy is developed, the functional units translate it into discrete action-plans that each department or division must accomplish for the strategy to succeed. A Guided Tour through the Wilds of Strategic Management Strategy Safari organizes the seemingly disconnected aspects of strategic management into 10 different schools of thought. Strategy Safari provides an overview of each school and presents a balanced view of each, including advantages and disadvantages. Because of its comprehensive and insightful approach, Strategy Safari presents an excellent overview of the field of strategic management.

Chapter 5 : Levels of Management

Levels of Planning. In management theory, it is usual to consider that there are three basic levels of planning, though in practice there may be more than three levels of management and to an extent, there will be some overlapping of planning operations.

Planning and estimating in the agile world depend on a single key metric: A release plan represents how much scope that team intends to deliver by a given deadline. Agile release cycles should certainly be kept shorter than a year, and are often as short as 6 months or 3 months. A release is, in turn, made up of iterations. For a given project, iteration length will typically be fixed at a length somewhere between a week and a month. If the release is in 6 months and iterations are going to be 2 weeks each, the release will consist of 13 iterations. After an initial feature list has been identified, prioritized, and potentially estimated, the team holds a release planning meeting to establish the overall release schedule and determine which features can likely be delivered. The overall release plan in terms of prioritized features is then used to directly feed individual iteration plans. Only one iteration plan exists at a time. With our chosen collection of important features we can now estimate the amount of effort to implement them. The people who will do the work, namely the developers, have authority to set the estimates. The manager will set the total amount of work that the next iteration can have planned. The customer then chooses a subset of the most important features that will fit into the next iteration. The iteration plan will often be verified by breaking the stories into development tasks and estimating them with finer grain units. At this level use cases could also be created. At the beginning of each iteration to identify the stories that will be developed, and to break each of them down into specific technical tasks and acceptance criteria. Iteration planning meetings generally last from hours, depending on the length of the iteration. The longer the iteration, the more time needed to plan its details. The result is an iteration backlog of stories, defects, tasks, and acceptance tests. Ideally, each iteration has a specified goal the team is attempting to achieve. As an example, an iteration planning meeting for a two-week iteration is typically time-boxed to approximately four hours. One approach many teams take is to separate the meeting into two sections, each with a different objectives. The team holds a daily scrum meeting called the "daily scrum. These scrum meetings are strictly time-boxed to 15 minutes. This keeps the discussion brisk but relevant. During the daily scrum, each team member answers the following three questions: What did you do yesterday? What will you do today? Are there any impediments in your way? By focusing on what each person accomplished yesterday and will accomplish today, the team gains an excellent understanding of what work has been done and what work remains. The daily scrum meeting is not a status update meeting in which a boss is collecting information about who is behind schedule. Rather, it is a meeting in which team members make commitments to each other. Agile Planning Onions Agile does lot more planning and risk mitigation than traditional processes. Agile focuses on planning very often instead of doing comprehensive and assumption based planning once. Each layer of the onion drives the goals of the layers below, sets timeframes, and defines ownership and interaction. Strategy – Strategic vision is at the top of the planning onion because it defines what a company is, and what it wants to become. The Timeframes on this layer are more about the individual strategic goals that are produced here. Typically, companies provide 1 year, and 5 year plans and share strategic vision and objectives with key management to pass down the chain. The layer is owned by C-Level management who define and govern all the execution of the strategic goals. Portfolio – The portfolio layer of the onion represents the overall product offering that consists of application suites and tools and how they interact with each other. While our clients utilize individual products, they typically engage many products that integrate and work together to provide an overall solution. The owner of this layer is typically upper management in the product area and has vision into the various product lines. Product – In our case, the product layer represents product teams who own one or more related products product suite. Each team sets a product vision and outlines the road-map for their products within the product suite. The typical time-box for our products is approximately 12 months out. Product Managers own this layer of the planning onion and validate road-maps for products to the Portfolio and Strategic vision. A product roadmap is a high-level plan

that describes how the product is likely to grow. An agile product roadmap also facilitates learning and change. A great way to achieve these objectives is to employ a goal-oriented roadmap – a roadmap based on goals rather than dominated by many features. Release – A release represents a prioritized backlog of product features that represent smaller plans that drive toward the product vision. A release is time-boxed here into approximately year quarters such that there are four releases per year. This provides a means for prioritizing themes to target the product road-map. Product Managers typically own this layer and work with the Product Managers to prioritize and slot high-level themes into releases to create a plan for iterations. Iteration – An iteration is a time-boxed set of features stories that we plan to deliver in two week increments. There are typically six iterations to a release. When planning, the product manager reviews the release plan and divides it into iterations worth of backlog and prioritizes to deliver key features quickly. Using guidance from the release plan, Product and Product Managers determine approximate priority of themes and epics to meet release goals. Stories are initially created by the Product Manager and shared with the team in story workshops. The team commits to a set of stories each iteration in planning meetings.

A new small business will not require many levels of business planning right away. However, a business owner may begin with an initial business plan and need to use different levels of business planning as the company grows.

The top management is the ultimate source of authority and it manages goals and policies for an enterprise. It devotes more time on planning and coordinating functions. The role of the top management can be summarized as follows - Top management lays down the objectives and broad policies of the enterprise. It issues necessary instructions for preparation of department budgets, procedures, schedules etc. It appoints the executive for middle level. It is also responsible for maintaining a contact with the outside world. It provides guidance and direction. The top management is also responsible towards the shareholders for the performance of the enterprise.

Middle Level of Management The branch managers and departmental managers constitute middle level. They are responsible to the top management for the functioning of their department. They devote more time to organizational and directional functions. In small organization, there is only one layer of middle level of management but in big enterprises, there may be senior and junior middle level management. Their role can be emphasized as - They execute the plans of the organization in accordance with the policies and directives of the top management. They make plans for the sub-units of the organization. They interpret and explain policies from top level management to lower level. They are responsible for coordinating the activities within the division or department. It also sends important reports and other important data to top level management. They evaluate performance of junior managers. They are also responsible for inspiring lower level managers towards better performance. It consists of supervisors, foreman, section officers, superintendent etc. In other words, they are concerned with direction and controlling function of management. Their activities include - Assigning of jobs and tasks to various workers. They guide and instruct workers for day to day activities. They are responsible for the quality as well as quantity of production. They are also entrusted with the responsibility of maintaining good relation in the organization. They communicate workers problems, suggestions, and recommendatory appeals etc to the higher level and higher level goals and objectives to the workers. They help to solve the grievances of the workers. They are responsible for providing training to the workers. They arrange necessary materials, machines, tools etc for getting the things done. They prepare periodical reports about the performance of the workers. They ensure discipline in the enterprise. They are the image builders of the enterprise because they are in direct contact with the workers. As a premium member, you get access to view complete course content online and download powerpoint presentations for more than courses in management and skills area.

Chapter 7 : What, When, How: The 3 Levels of Strategic Agile Planning

Planning is the part of management concerned with creating procedures, rules and guidelines for achieving a stated objective. Planning is carried out at both the macro and micro level. Managers need to create broad objectives and mission statements as well as look after the day to day running of the.

The 3 Levels of Strategic Agile Planning Jeremy Jarrell 3 June When we think of agile, we often think of quick reactionary planning to the realities of a project as it unfolds. For that reason, most discussions of agile planning focus on the short term. Our teams plan and synchronize at the daily level using recurring morning stand-ups. And, for those teams practicing Scrum, we plan at the iteration level using recurring sprint planning meetings. Both of these practices are great for keeping a team on the same page tactically, but what about strategically? Luckily, there are some simple techniques for aligning your team strategically and helping them to think beyond the sprint. Strategic agile planning comes down to three simple questions: What are we doing? When do we need it done? How are we going to get there? The key is to remember that the answers to these questions will likely change as your team progresses through the development of your product. But, by taking an iterative approach, you can keep your teams on track to ensure that you deliver the right product at the right time. What are we building? The most important decision that you need to make as a team is what are you building? But the question is often more complicated than that. Instead, the deeper question is often what need should your product be solving. One of the best ways to answer this question is with a visioning canvas. The example that you see here is how a vision board for a streaming music service, named Ostinato, may look. Notice that the vision board starts at a higher level than the specific needs of the product and instead focuses on the overarching need that the product is trying to fulfill. Although your product vision is unlikely to change daily, you should expect it to evolve as you learn more about your target users, potential competitors and where your product can most effectively fit in the market. For that reason, plan to repeat this exercise periodically to re-evaluate core assumptions that you may be making about the competitive landscape, as well as to take a fresh look to help spot opportunities for growth. To do this, a good rule of thumb is to repeat this exercise annually, though newer and more rapidly evolving products may benefit from a slightly more frequent cadence. When does it need to be done? This combination of answering both when you want to deliver your overall product as well as how and when you want to make small incremental deliveries along the way will become your product roadmap. They show, at a high level, the overall strategic direction that you plan to take your product, as well as the different guide points along the way that will help get you there. Agile product roadmapping has become a hot topic in the past few years with several very nice tools coming on to the market. However, my favorite is still the goal-oriented product roadmap, or GO roadmap, which was created by the very same Roman I mentioned previously. What sets the GO roadmap apart is that rather than focusing on the features required for each release, it instead focuses on the goal of each release. This approach not only frees you from thinking about implementation details and sequencing too early, but it also leaves the responsibility to define the specific features of each release until a time when you know more about them. Notice that any features defined here are very high level and intentionally lack specific detail. Forcing your team to define features too early often creates an unrealistic impression of certainty for your product and can even lock you into a less than optimal feature set too early. Instead, thinking at a higher level about the overarching goals that each release should meet will free you to think strategically not only about the impact of each release, but also how the entire release cycle for the product fits together as a whole. As a rule of thumb, you should be able to draw a diagonal line from the last objective of the nearest release to the last objective of the farthest release showing how each release becomes progressively less defined as you move toward the horizon. How are we going to do it? The final piece of strategic planning is to lay out a plan for how your team will approach the next release. While this release plan contains much of the same information found in your roadmap, it also adds lower level information such as a prioritized list features that will be tackled in each release. These features can be prioritized by whatever means is the most comfortable for your team Expect to revisit your release plan after each minor release, which should occur more frequently than the

major releases detailed on your roadmap. For example, if you follow a release cadence of a major release at the end of each quarter with minor releases at the end of each subsequent month, then you should expect to revisit your roadmap quarterly and your release plan monthly. The goal is to create a plan that represents what your team is currently working towards as well as to give you an idea of what lies in the future. Ideally, your entire team should be involved in this meeting as they will be those who will deliver the work inside of each release. And, as with the roadmapping discussion, you should be focused primarily on the next upcoming release and expect subsequent releases to be progressively less defined as you move out to the horizon. In fact, the guiding principle of drawing a horizontal line from the last feature in the next release to the last feature in the farthest release works just as well for release plans as it does for roadmaps. Seeing the big picture Strategic agile planning is as much of an iterative exercise as anything else that we do in an agile context. By taking an agile approach to your strategic planning, you can significantly increase the odds that the product you deliver will make the impact you envision.

Corporate level: Planning at this level should provide overall strategic direction for an organization, sometimes referred to as the "grand strategy." This is a concise statement of the general direction which senior leadership intends to undertake to accomplish their stated mission or vision.

Iteration Plan Daily Commitment The certainty of undertaking activities addressed in each of the five levels increases as the planning horizon reduces from a year, to a quarter, and then to two weeks see Figure 1. Therefore, the amount of detail addressed, the number of people involved, and the frequency of planning and design activities can increase without running the risk of spending money on features that may not be built or may be built differently. Agile planning activities for large-scale development efforts

Level 1 - Product Visioning The broadest picture that a person can paint of the future is the product vision. In this vision, the product owner explains what an organization or product should look like after the project finishes. She indicates what parts of the system need to change establishing priority and what efforts can be used to achieve this goal establishing estimates and commitments. Lead a Product Visioning Exercise The product vision describes a desired state that is six months or more in the future. Further planning activities will detail the vision, and may even divert from the vision because the future will bring us a changed perspective on the market, the product, and the required efforts to make the vision reality. The principle of both exercises is to create a statement that describes the future in terms of desired product features, target customers, and key differentiators from previous or competitive products. Anyone who has gone through Certified ScrumMaster training is likely familiar with the product visioning exercise.

Level 2 - Product Roadmap The era of large-scale projects that deliver results in years is behind us. Customers demand more frequent changes, and time-to-market is measured in weeks or months. The higher frequency and smaller timeframes force a product owner into thinking in steps - into thinking of a road towards the final product. Just like a journey is planned upfront and shared with fellow travelers, a product roadmap is created and communicated to fellow delivery people. The goals for doing so are for the product owner to: Communicate the whole Determine and communicate when releases are needed Determine what functionality is sufficient for each release Focus on business value derived from the releases The delivery team, on the other hand, will: See the whole Learn about the steps to realize the vision Learn the business priorities Provide technical input to the roadmap Provide estimates for the projected features How To: Develop a Product Roadmap The creation of the roadmap is largely driven by the product owner in a single meeting or a series of meetings. This can be done, quite literally, through a graphical representation of the releases, or more formally in a written document outlining dates, contents, and objectives of the foreseen releases. In anticipation of the next planning stage, a list of desired features also needs to be built - this is the product backlog. In its simplest form, such a backlog is a table or spreadsheet of brief product requirements, so the delivery team can provide estimates for delivery of each feature. Because the success of an agile project depends on the early delivery of the highest priority features, the list must be prioritized. And because the success of a project is measured in business terms, the prioritization of the feature list is the responsibility of the business, i. Interaction with the delivery teams is required. Without a discussion of the features it will be hard for the delivery team to produce estimates that have an acceptable inaccuracy. Characteristics of a product backlog include: One product backlog for all teams see the whole Feature priority based on business priorities Technology features sometimes called non-functional features limited to those that have direct impact on the success of the product in the market

Level 3 - Release Planning In small projects, the product backlog alone can provide enough project overview. The size, duration and deliverables are easily recognized, and there is no need to synchronize or group deliverables or teams. All of this changes when applying agile concepts to programs. The first moment to start grouping activities and allocating them to teams occurs during release planning. A release is what the name implies: Some characteristics of a release are: Releases are defined by date, theme, and planned feature set Scope, not date or quality, is the variable, which highlights the need to use a prioritized product backlog as the basis of a planning event All teams must commit to the same rhythm of iterations. When all teams work to the

same rhythm, the discovery and management of dependencies occurs automatically during the planning activities. There are fixed release dates across all teams of the program with a typical interval of two to four months. Release vs. Iteration A release is defined at the system or program level, usually in product owner vocabulary. The release theme, release date, and prioritized features together form a release as defined by the product owner. When releases are seen in the perspective of the roadmap, the highest level of visibility and confidence are in the current and next release. Near-term releases have more detail in the feature descriptions and have smaller individual features. A release can stretch over six to nine months, although two to four months is more common. An iteration, on the other hand, is defined at the feature level. The delivery team and product owner have agreed on the number of iterations in a release. Features delivered in an iteration are determined by the priority, and the number of features delivered is set by the velocity of the team and the team estimates of the features. Iteration lengths vary from one to six weeks, with two weeks as the most frequent duration.

Conduct Release Planning A release planning session typically takes place over a full day or sometimes two, if the program is very large hundreds of team members. All team members participate in the session, including product owner, full delivery team, and stakeholders. Release planning should be highly collaborative and interactive. Tools used are typically sticky notes, flipcharts, and whiteboards, and results will be managed and communicated in an Agile project management tool. Before or during the session, detail is added to the features by decomposing them into tasks. The actual capacity of the individual teams is known with more certainty than during the release planning session. The combination of these increased accuracies helps the team commit to delivering a number of features during the iteration with a high degree of certainty.

Plan an Iteration The structure of the iteration planning session resembles release planning, with the prime distinction of the planning horizon - only a single iteration. Although the teams work individually to produce their iteration plan, synchronization between teams provides an effective mechanism to detect and resolve dependencies. The core of activities of iteration planning is carried out on a team-by-team basis:

Level 5 - Daily Plan The stand-up meeting is part of everyday life for agile teams. This daily meeting is not often seen as a planning session, but it certainly is. The people look a day ahead, have learned from the earlier days in the iteration, and tell each other what they plan on doing. Issues are raised, possibly addressed, and the success of delivering the desired features within the iteration can be determined after the meeting.

Have a Stand-up Meeting Like other planning activities, daily plans need to be synchronized between teams. The three questions answered are the same as in the individual stand-up meetings: How are all the teams progressing? What are the cross-team impediments? Who is taking the actions to remove them? For example, all the IT delivery teams have a daily coordinating stand-up, as do the training teams, finance teams, pre-production teams, and so on. On a weekly schedule or daily if it is late in the release cycle, representatives of each team meet to report progress, plans and impediments. Added levels of planning are not artificial or time consuming, and they help focus the right group of people on the product with the right level of detail, thus avoiding spending large amounts of time and money before the actual delivery of features begins. When any member of the team desires to hang on to details of work specification and planning, then agile implementation is on its way back to waterfall methods.

Chapter 9 : Planning in Management: Strategic, Tactical, and Operational Plans

Each level of the company has different objectives when it comes to planning. Corporate planning is responsible for making decisions for the whole company and makes strategic goals for the long term.