From #NoPlanning
(or the tyranny of fixed schedule and scope)
toward a more agile approach

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May I have another Plan?

- All activities for 3,000+ person IT delivery org centrally managed by a PMO:
  - Deployments set 2-4 years in advance
  - “Scope locked” 18 months in advance
  - Work estimates provided by external Systems Integration partner
  - Activity and milestone schedule dictated to those doing the work
  - Gate reviews to inspect and veto progress based on binary data points

- Silos in IT and Business:
  - Each had an organization focused on new products/functionality, and another for supporting deployed stuff
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My Goal in 5 Minutes:

If any of this sounds familiar to you, I hope to provide a few useful insights into the more successful bits of our efforts related to changing our approach to planning.
“Agile” with some constraints

- IT-led journey to agile. Or, “agile for IT stuff as long as it still adhered to the program gates and milestones”
- Established Dojo for immersive team learning and mobilization
- Good team-level agility
- ...but the PMO still reigned
- ...teams were too disconnected
- ...and the business wasn’t fully engaged
What worked for us?

- Measure and challenge incumbent beliefs
  - >70% of “fixed scope” changed by the time we deployed to production
  - 40% of what made it to production was never used

- Experiment, pilot, try
  - Don’t worry about not going “all in” with every approach the first time
  - Use small successes to build credibility and expand

- No ivory tower coaches
  - Must be willing to roll up your sleeves and link elbows with those you’re guiding
What worked for us?

• Watch your f#@!ure language
  • Connect your stories to strategic initiatives
  • Establish common language and sizing guidelines
  • Trace everything to this backlog

• Align your cadence
  • Especially in tightly coupled systems
  • When the organization is learning together, this prevented confusion
  • Align ≠ “make everything identical”
    • System Teams’ PI was 180° out of phase with Product Teams
Hierarchy of Work

**Strategic Themes and Initiatives**
- Establish a common global backlog aligning our priorities
- Each layer further refines the desired outcomes and measurement criteria

**Features** are at the intersection of Strategy and Execution
- They originate in Strategy. Once prioritized, they track execution for the associated delivery work.

**Epics, Stories, and Tasks** reside on a Product Team’s ONE Backlog
- Each team has autonomy in how the work is organized, with global standards for traceability, Definition of Done, and Release and Automation “meta-data”
What worked for us?

• Big Room Planning
  • Nobody wanted to be left out
  • Most effective way for us getting IT and Business to really talk...
  • ...and former support organizations to adapt to new ways of supporting
  • Don’t forget to pilot it first!
  • Don’t be afraid to go big → 600+ people across 75+ teams creating or refining 4000+ backlog items!
  • Mobilize a small but active and influential group to keep it on track
  • Don’t skimp on fun and food
  • Let teams get creative
# Big Room Planning Process

<table>
<thead>
<tr>
<th>INPUTS</th>
<th>BIG ROOM PLANNING EVENT</th>
<th>OUTPUTS</th>
</tr>
</thead>
</table>
| Solution Roadmap  
Product Roadmap  
Technology Roadmap  
Deployment Roadmap | Vision & Context  
Executive Briefing  
Product, Technology and Deployment Vision | Team Breakouts  
Capacity Planning  
Backlog Sequencing  
Risk Identification |
| Clear Priorities  
Force Ranked  
Aligned to Strategic Initiatives | Cross-Functional Feature Planning  
Release Planning  
Dependency Mapping  
Management Review and Problem-Solving | Plan Confirmation  
Confidence Check  
Planning Retrospective  
Risk Management |
| | Program Increment Plan  
Feature and Epic Delivery Targets  
Detailed Dependency Maps  
Risks Identified and Mitigation Plan  
Upcoming Releases Planned | Commitment  
Teams committed to delivery  
Leadership support and scope containment |
Caution!

- Don’t forget to Coach your Product Owner on how to stand behind their team’s commitments
- Be cautious of the Senior VP that pops in to see how it’s going without context
- It’s not a “Big Room” if it doesn’t include the team members delivering the work
- Make sure the right leadership knows what you’re doing in Big Room and won’t change the agenda 12 hours prior to kick-off
Let’s Talk!

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