

A close-up photograph of a person's hand resting on a red running track. The hand is positioned on a white starting block. The track has white lane markings and arrows. The background is slightly blurred, showing more of the track and the person's arm.

# RefineM

## Developing an Agile Plan

NK Shrivastava, PMP, RMP, ACP, CSP, SPC4  
CEO/Enterprise Agile Coach - RefineM

# Agenda

## 1. Introductions and Expectations

## 2. What is an Agile Plan?

1. Agile Plan vs. Waterfall Plan
2. Agile Planning Onion
3. Product Planning
4. Release Planning

## 3. Summary / Q&A

Download the slide deck: <http://bit.ly/refinem-may-2021-slides>

# Your Expectations

- What are your expectations from this webinar?
  - Why are you here today?



Helping organizations  
turn their project  
management capability  
into a *competitive  
advantage*

# NK Shrivastava

## PMP, RMP, ACP, CSP, SPC4

- CEO/Enterprise Agile Coach since Dec 2011
  - Agile Transformation/Coaching/Adoption
  - Project Management/Process Improvement Consulting
  - Project Management and Agile Training
    - ✓ PMP Exam Prep - <https://refinem.com/pmp-exam-prep-course-public/>
    - ✓ PMI-ACP Exam Prep - <https://refinem.com/pmi-acp-exam-prep-course-public/>
    - ✓ Agile Leadership - <https://refinem.com/agile-leadership-course/>
    - ✓ Self-Paced Online Training - <https://refinem.com/self-paced-online-trainings/>
  - Products for Project and Agile Professionals
    - ✓ Essential Gear for Project Managers - [RefineM.com/products/essential-gear-for-project-managers/](https://RefineM.com/products/essential-gear-for-project-managers/)
    - ✓ PMP Exam Simulator - [RefineM.com/pmp-exam-prep-practice-test/](https://RefineM.com/pmp-exam-prep-practice-test/)
    - ✓ Agility Assessment Tool - [Agility.RefineM.com/](https://Agility.RefineM.com/)
    - ✓ Videos – PMP and Agile - <https://vimeo.com/search?q=RefineM>
- 20+ years of successful Agile & Project leadership
  - ✓ Successfully led hundreds of projects of all sizes using Waterfall and/or Agile
  - ✓ Recovered many projects, saved millions of dollars
  - ✓ Implemented numerous process improvements
  - ✓ Coached/mentored hundreds of PMs and executives
  - ✓ Board member of SWMO PMI Chapter (2008-2014)

# What's New at RefineM

Upcoming Webinars / Events	Date
<b>New WOWs for Remote Agile Teams</b> <a href="https://refinem.com/refinem-april-2021-webinar-new-wows-for-remote-agile-teams/">https://refinem.com/refinem-april-2021-webinar-new-wows-for-remote-agile-teams/</a>	Jun 2
<b>PMP® Exam Prep over Eight Consecutive Saturdays</b> <a href="http://refinem.com/pmp-exam-prep-course-public/">http://refinem.com/pmp-exam-prep-course-public/</a>	Jun 19-Aug 07

RefineM Products	Self-Paced Online Training
<a href="https://refinem.com/products/">Essential Gear for Project Managers</a> <a href="https://refinem.com/products/">RefineM.com/products/</a>	<a href="https://refinem.com/course/agile">Agile Fundamentals Self-Paced Course</a> <a href="https://refinem.com/course/agile">RefineM.com/course/agile</a>
<a href="https://examprep.refinem.com">PMP® Exam Prep Test Simulator</a> <a href="https://examprep.refinem.com">Examprep.RefineM.com</a>	<a href="https://refinem.com/course/project-management-fundamentals/">PM Fundamentals Self-Paced Course</a> <a href="https://refinem.com/course/project-management-fundamentals/">Refinem.com/course/project-management-fundamentals/</a>
<a href="https://agility.refinem.com">Agility Assessment</a> <a href="https://agility.refinem.com">Agility.RefineM.com</a>	<a href="https://vimeo.com/ondemand/refinembusreq">Agile BusReqs Self-Paced Course</a> <a href="https://vimeo.com/ondemand/refinembusreq">https://vimeo.com/ondemand/refinembusreq</a>
<a href="https://vimeo.com/ondemand/refinempdus">PDU Bundle</a> <a href="https://vimeo.com/ondemand/refinempdus">https://vimeo.com/ondemand/refinempdus</a>	<a href="https://udemy.com/course/backlog-grooming-for-agile-requirements/">Backlog Grooming Self-Paced Course</a> <a href="https://udemy.com/course/backlog-grooming-for-agile-requirements/">Udemy.com/course/backlog-grooming-for-agile-requirements/</a>

# Survey Question 1

**What type of planning do you have more experience with?**

- A. Agile Planning
- B. Waterfall Planning
- C. Hybrid Planning

**Vote now – 1 minute**



## What is an Agile Plan?

1. Customer-driven
2. Product/value-focused
3. Iterative and Incremental
4. Feature- vs. Task-committed
5. Built-in Quality

# Agile Plan vs. Waterfall Plan

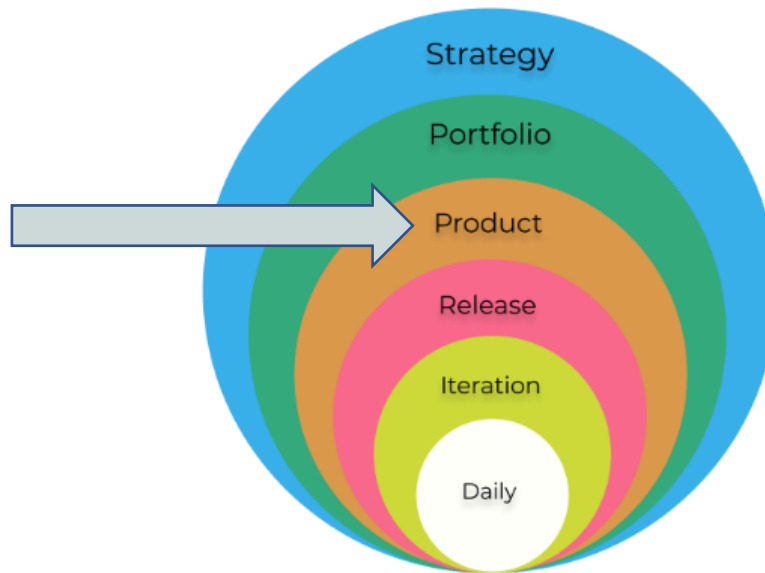
Agile Plan	Waterfall Plan
Customer-driven	Milestone-driven
Product/value focus	Milestones/Tasks focus
Iterative/Incremental	Predictive
Feature-committed	Task-committed
Quality built in	Quality usually a separate phase



# Agile Planning Onion



# Product Planning Iteration



# Product Planning



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# Product Vision

1. What is the product's purpose?
2. How does it add value?



***For [customer] who has [need/opportunity], our [product] is a [product category] that provides [key benefit/solution] by [differentiator]***

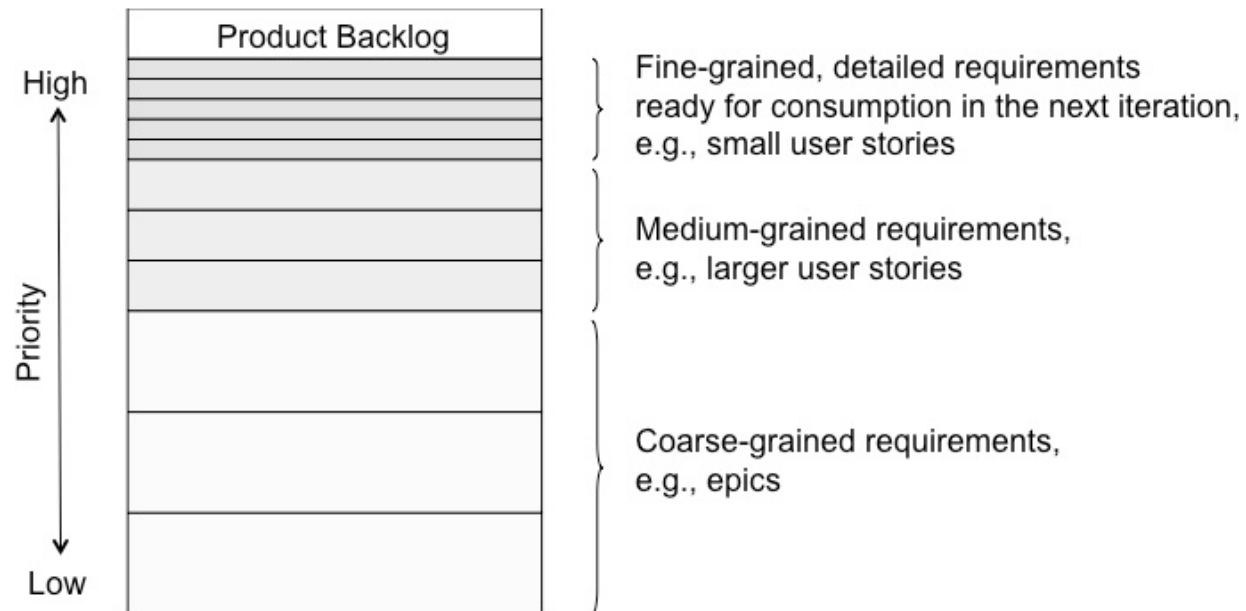
*Example: For education administrators who need to be able to track student progress district-wide, our tracking tool is a cloud-based software tool that provides real-time tracking by utilization of faster servers than any of our competition.*

# List of Customers and Stakeholders

1. Who are the customers?
2. Who are the stakeholders?
3. What are their expectations?  
What they care about?

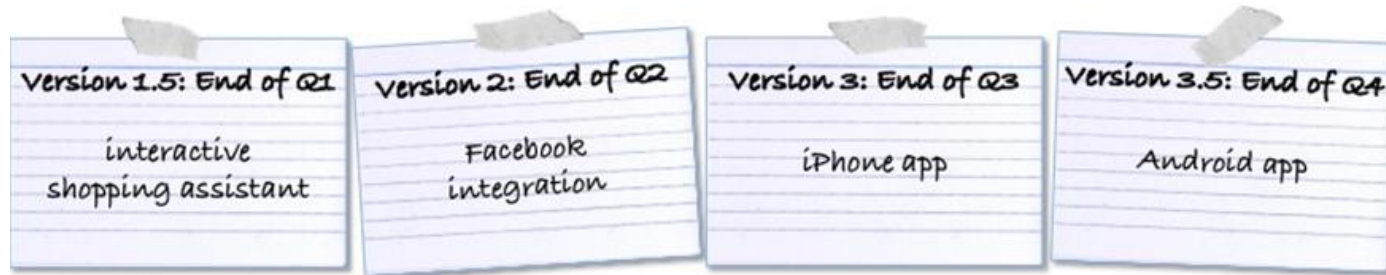


# Product Backlog

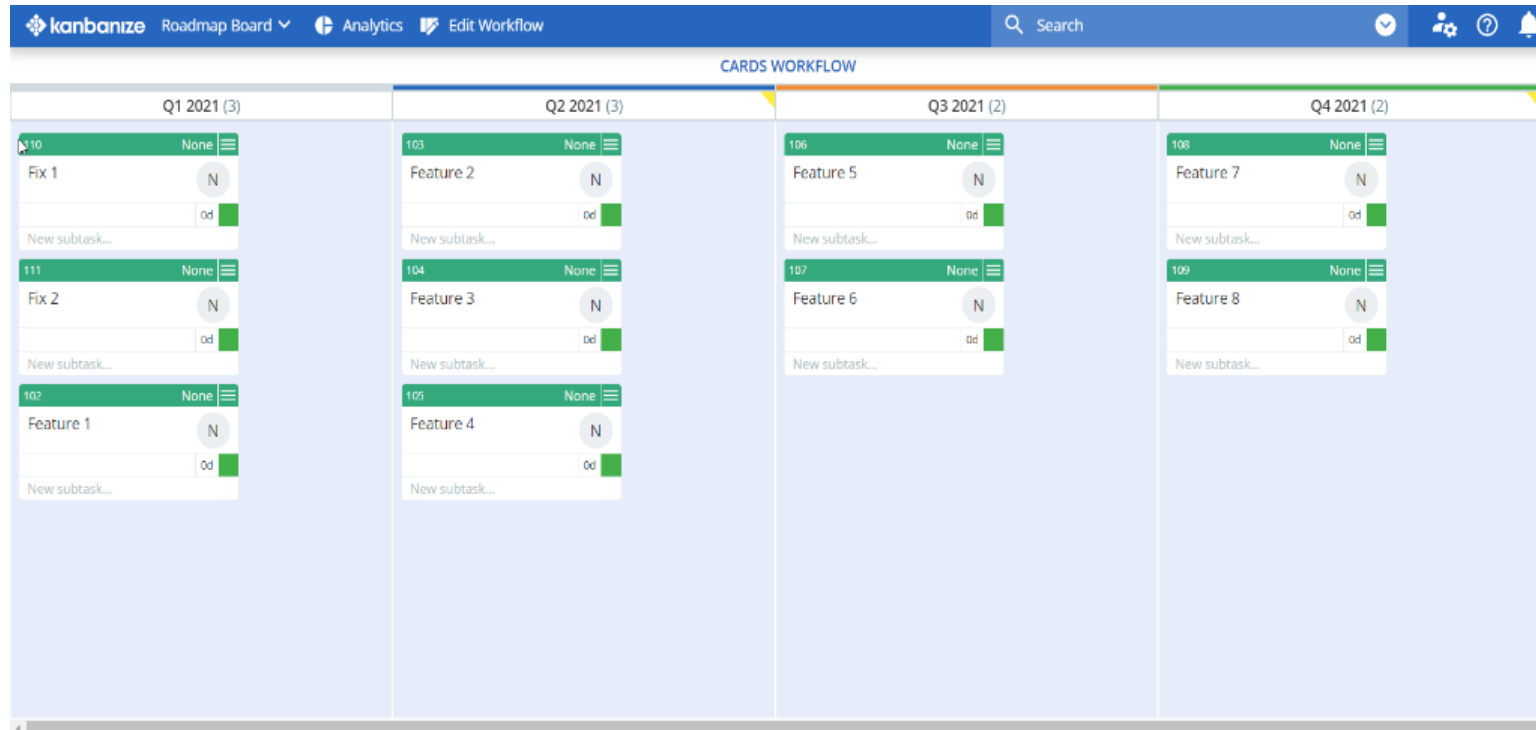


# Product Roadmap

1. A high-level plan that describes how the product is likely to grow
2. Allows you to express what features / functions should the customer expect when?



# Example of a Product Roadmap





# Transparency & Collaboration

1. How is the customer involved and how frequently?
2. How transparency and communication will be achieved for maximum collaboration



# Key Agile Metrics

1. Customer Satisfaction (NPS)
2. Time to Market/ Customer Lead Time
3. Revenue/ Profitability/ Market Share
4. Throughput/ Velocity
5. Process Efficiency
6. Quality (Defects, Rollbacks, Performance)



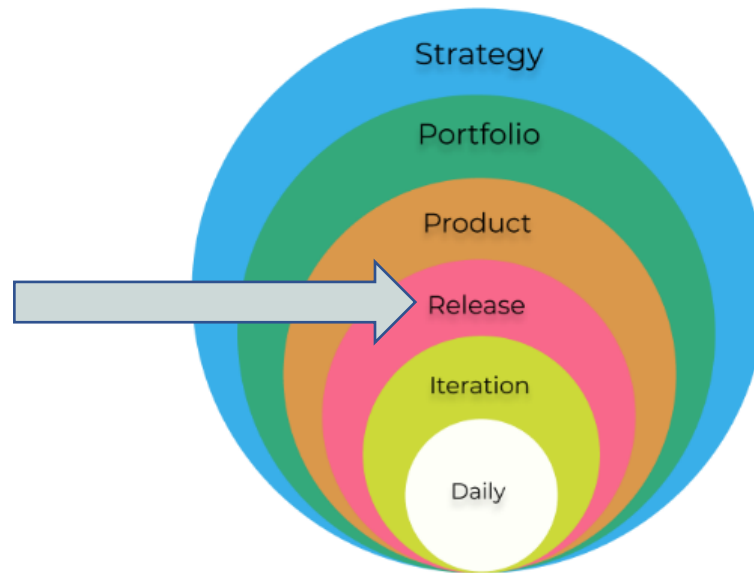
# Blockers and Risks

1. What is impeding us now and how to fix?
2. What could be a problem in the future (risk)?
3. Make sure backlog is risk-adjusted

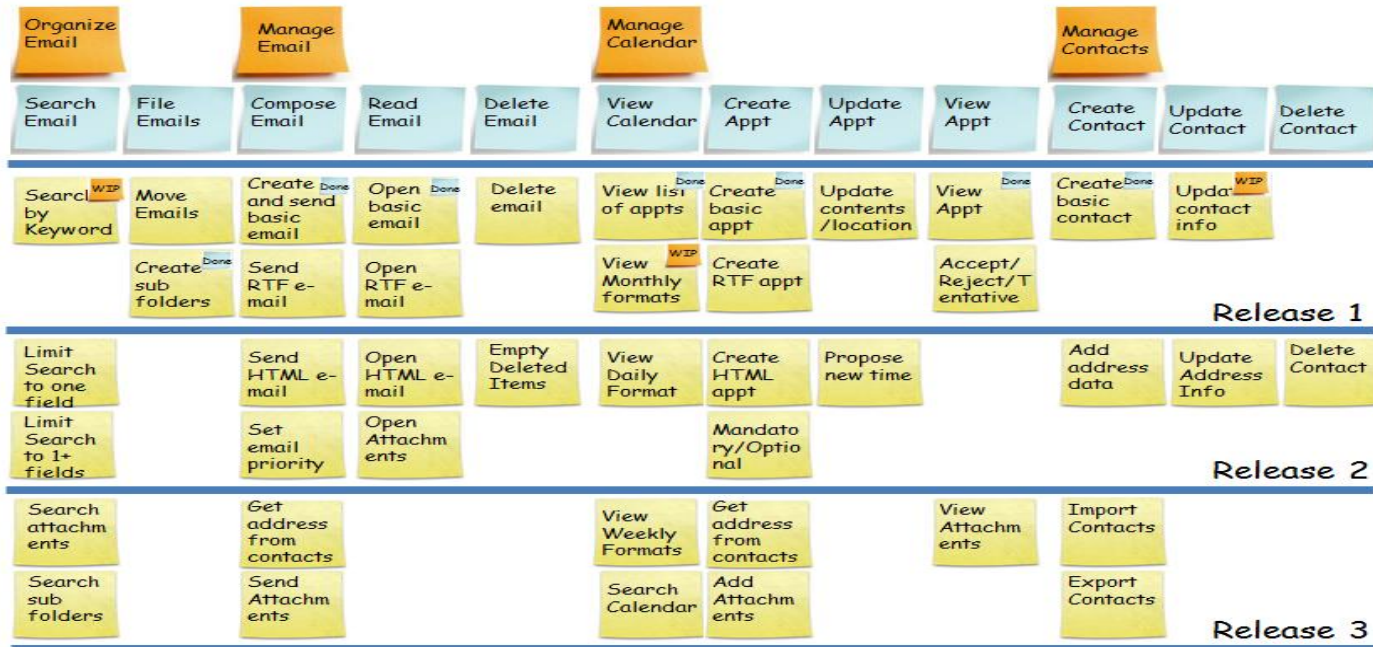


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# Release Planning Iteration



# Release Planning: Story Mapping



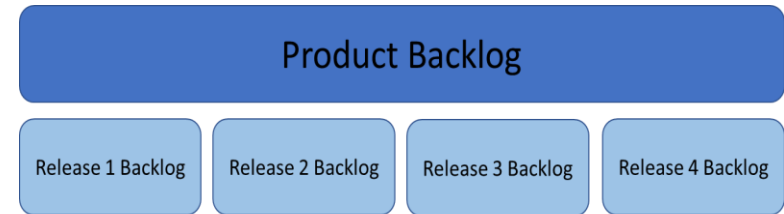
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2  
1








# Release Backlogs from Product Backlog

1. How many releases will there be?
2. What are the highest-priority increments for each release?



# Plan for First Release

1. Determine number of iterations
2. Determine duration for each iteration
3. Define goal for each iteration
4. Keep time for planning the next release, and refining the rest of the product plan

1	2	3	4	5	6	7
						

# Agile Planning Template

RefineM Agile Planning Template						
Iteration / Sprint / Release	1	2	3	4	5	6
Dates	MMDDYYYY	MMDDYYYY	MMDDYYYY	MMDDYYYY	MMDDYYYY	MMDDYYYY
Code Drop 1 (Story Points = ?)	Theme - This code drop will provide this functionality that will help the user in this way					
Story 1	Develop and Test	▲	▲			
Story 2		Deployed in Production	Released to User			
Story 3						
Bug fixes (5)						
Code Drop 2 (Story Points = ?)	Theme - This code drop will provide this functionality that will help the user in this way					
Story 4		Develop and Test	▲	▲		
Story 5			Deployed in Production	Released to User		
Story 6						
Story 7						
Bug fixes (7)						
Code Drop 3 (Story Points = ?)	Theme - This code drop will provide this functionality that will help the user in this way					
Story 8			Develop and Test	▲	▲	
Story 9				Deployed in Production	Released to User	
Story 10						
Bug fixes (4)						
Code Drop 4 (Story Points = ?)	Theme - This code drop will provide this functionality that will help the user in this way					
Story 11				Develop and Test	▲	▲
Story 12					Deployed in Production	Released to User
Story 13						
Story 14						
Bug fixes (2)						

Download the template: <http://bit.ly/refinem-agile-plan-template>



# Survey Question 2

**Which of the concepts covered today do you think will be most beneficial for you to adopt?**

1. Product Vision
2. Product Roadmap
3. Agile Metrics
4. Blockers and Risks
5. Story Mapping
6. Release Planning
7. Agile Planning Template

**Vote now – 1 minute**

# Conclusion

1. Agile planning requires a different mindset
2. Keep focus on the customer
3. Start with the product planning
4. Incorporate release planning
5. Iterate / improve as necessary



*It answers the basic question - What the team will deliver and when?*

# Questions?

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