Planning is Agile, Planning is Traditional, Planning is Hybrid, Planning is Planning

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Outline

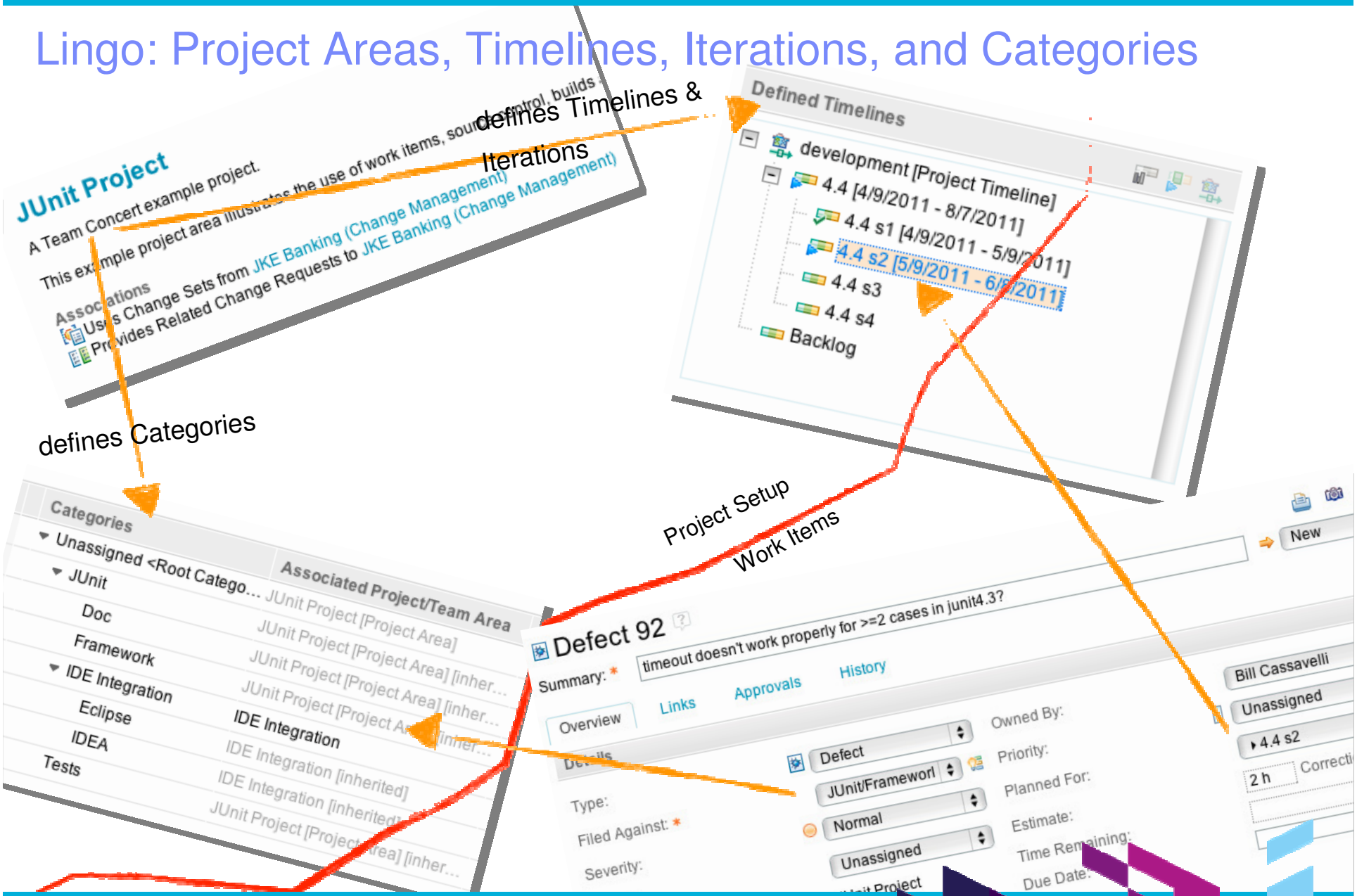
- Basics: RTC Planning
- Agile, Traditional, Hybrid
- Compare, Mix & Match

Basics:
RTC Planning

Team Concert's Planning Support

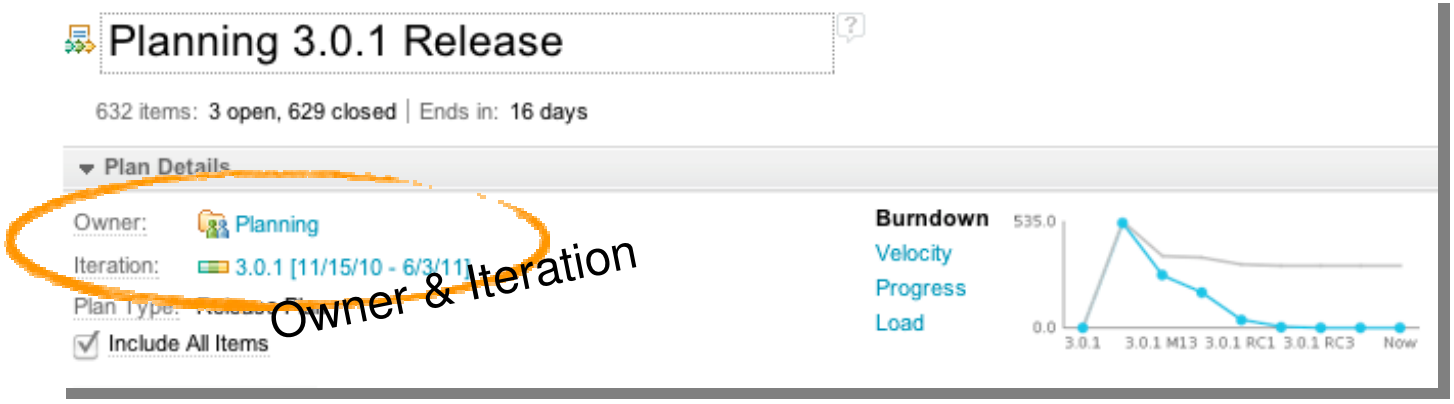
- Team Concert's Planning support has the following key characteristics:
- Process neutral (works with Scrum, OpenUp, Formal Project Management, …), but assumes
  - supports two level planning: plan items and execution items
  - supports monitoring releases, phases, iterations/milestones
- No separation between planning/implementing of features and bug fixing
  - Both planning and defect management share a common data model
  - They are supported in the same tool and are highly integrated
  - Plans are in fact a query for work items
- Supports:
  - Top down planning (project manager, product owner, team leads, …) **AND**
  - Bottom Up (team members) **AND**
  - Plan consolidation (Sprint planning meetings, stand-ups, …)

Lingo: Project Areas, Timelines, Iterations, and Categories



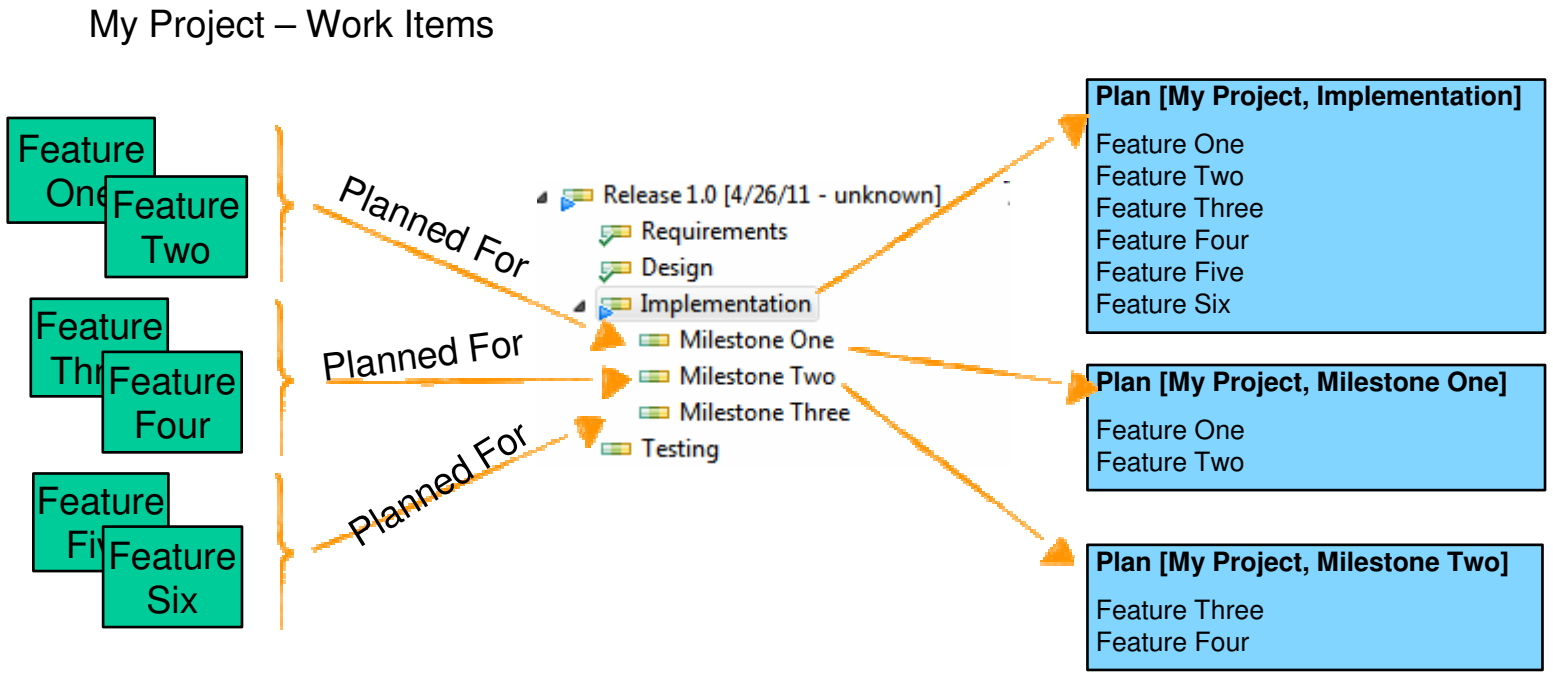
Plans: Creating & Populating

- Plans are owned by a Team or Project and are associated with an Iteration
- Plan content is derived from this:
  - All work items which have a Filed Against value set to a category associated with the plan's owner and which are planned for the plan's iteration.
  - If the plan's project area / team area has child-team areas work items of the child-team areas are included as well.
  - If the iteration has child-iterations work items of the child-iterations are included as well.



Plan Slicing

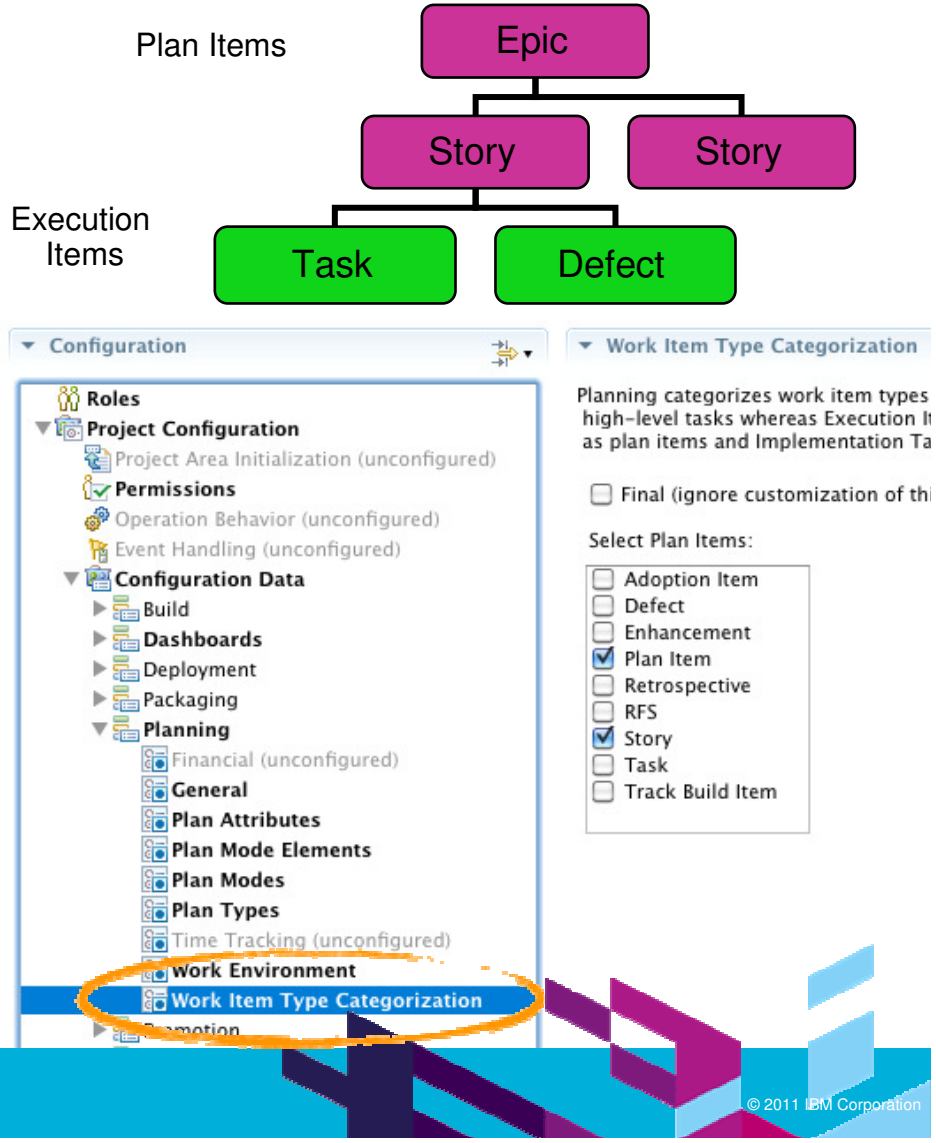
- Plans include items from child-team areas and child-iterations. This allows to slice larger plans into smaller once.



Plan and Execution items

- Work items have two flavors:
  - Execution Items - Work items which have work assigned. In Scrum these are Task and Defect
  - Plan Items - Work items that are relevant for the planning. In Scrum these are Epics and Stories

- RTC allows to customize which work item types are plan items and which types are execution items.



Agile Estimation and Sizing

- Planning separates **estimating the size** from **estimating the effort**
- The **size** is often estimated in relative values. Scrum uses **Story Points**
- The **effort** is typically estimated in **Ideal Hours/Days**
- **Velocity** measures a teams rate of progress
  - Completing 2 Stories of 5 story points in one iteration gives a velocity of 10
  - Good guess is to assume the same velocity for the next iteration
  - team velocity is what matters

- It is not so different for traditional planning. They usually size in man days (ideal effort). RTC Planning component can use man days for sizing as well.

One Plan, Many Views

- Plans offer multiple views depending on what you're doing
  - Ranked List aka Backlog
  - Work Break Down Structure (WBS)
  - Roadmap / Gantt-Chart
  - Schedule Variance
  - Task Board

Characterize: Traditional & Agile

Traditional: PMBOK Guide

- Traditional project management is based on the principals described in the PMBOK Guide(1)

Five Process Groups:

- Initiating
- *Planning*
- *Executing*
- *Monitoring and Controlling*
- Closing

Nine Knowledge Areas:

- Integration Management
- *Scope Management*
- *Time Management*
- Cost Management
- *Quality Management*
- Human Resource Management
- Communications Management
- *Risk Management*
- Procurement Management

(1) A Guide to the Project Management Body of Knowledge (PMBOK Guide) - Project Management Institute

Agile: The Manifesto

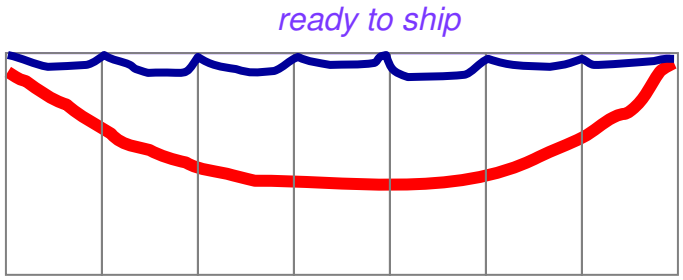
Individuals and interactions over processes and tools
Working software over comprehensive documentation
Customer collaboration over contract negotiation
Responding to change over following a plan

(see http://agilemanifesto.org/)

Short iterations – the main driver

- Allows feedback / quality checks any n weeks
- Each milestone is a miniature development cycle
  - plan, execute, test, ship, retrospective
- The iteration outcome (library, product, …) must be shippable / consumed
  - Other teams, betas, demos, …

∅ Short iterations reduce stress !!



Agile Methods

- There are several Agile Methods available, however from a bird's eye view they share a common set of tooling relevant properties:

- Short development cycles (1 – 6 weeks)
- Self organizing development teams
  - Joint planning meetings
  - Stand-up meetings
- High personal responsibility of team members
  - Developers "manage" their work
  - Developers / Teams estimate
- Progress tracking
- Ongoing customer involvement
- Retrospectives
- Use of historical data to improve planning

Mix & Match - Planning

"We do Scrum, but..."

- Most of the RTC customers are neither 100% agile nor 100% traditional (even IBM isn't ☺)
- Goal is to support projects that mix agile and traditional concepts.
- The overall process is traditional the development execution happens agile.
  - Need for an overview Gantt – which feature is delivered in which iteration
  - Visualization of the dependencies between features
- The overall process is agile but the execution of a single iteration happens traditional
  - Need for a traditional scheduler (schedule dependencies & constraints)
  - Need for traditional resource management

RTC/Planning is a tool, not a methodology

Taskboard

Agile Scheduler

Operate on Live Data

load & progress

Ranking

Kanban-style board

Gantt charts

Traditional Scheduler

process templates

CALM Integration

Burndown

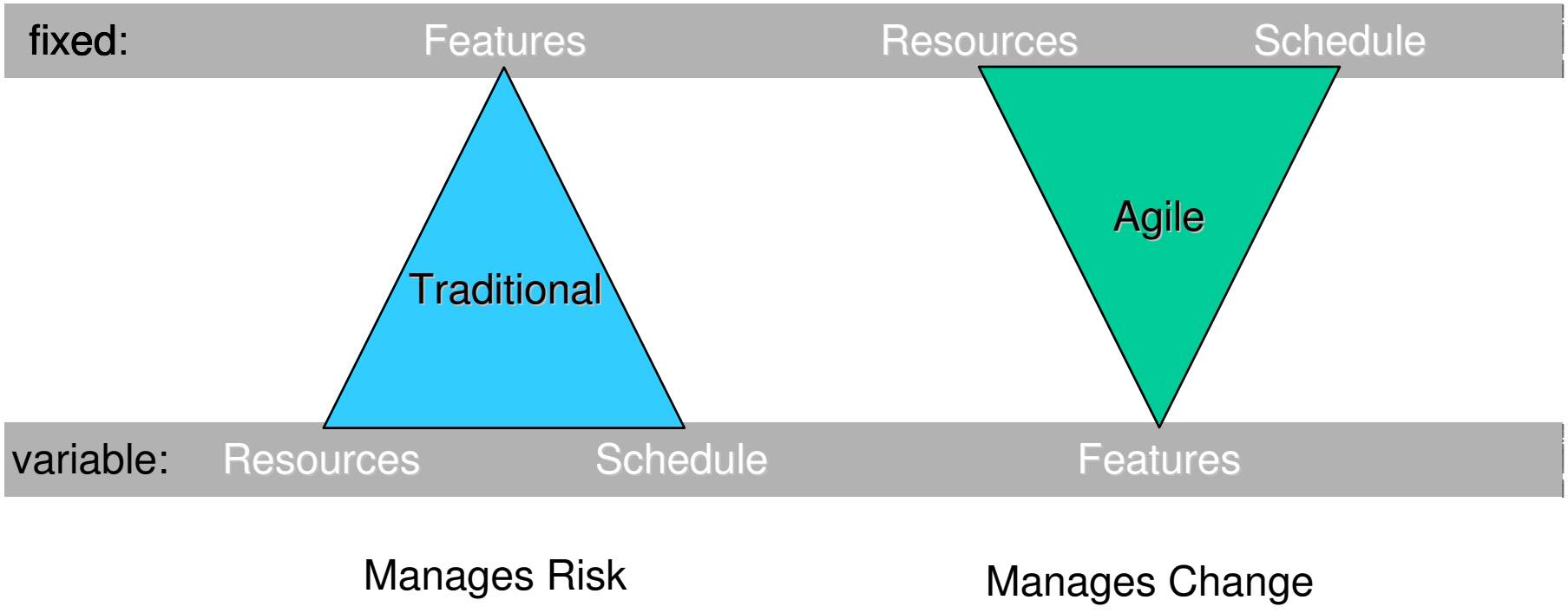
My Work

Plan Links

Snapshots

Compare:
Traditional & Agile

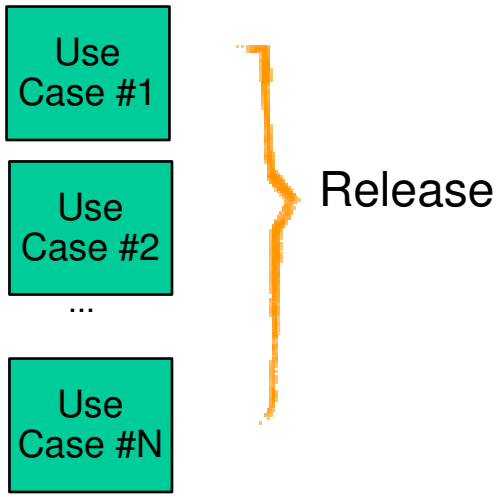
Comparison between Traditional & Agile



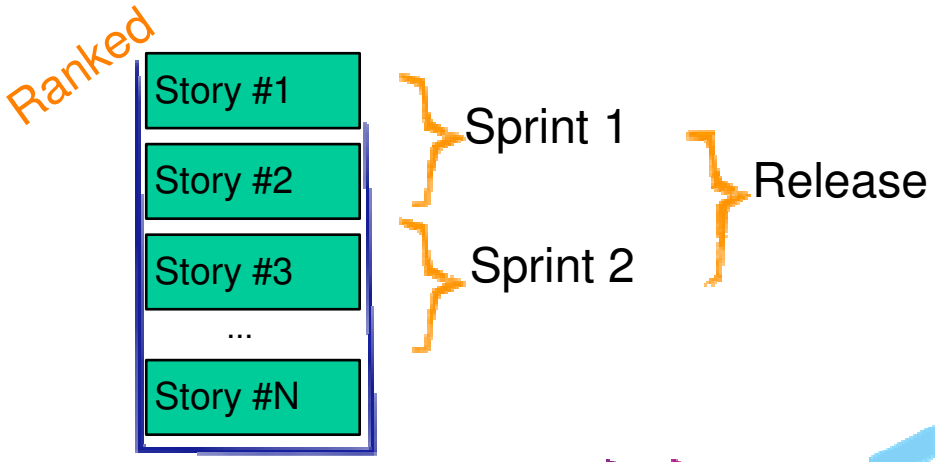
(1) The Software Project Manager's Bridge to Agility

Different Management of Features

- Traditional
  - Manage a single release plan
  - Requirements (committed)
  - Won't Change
  - Sized in Hours, Man-Days

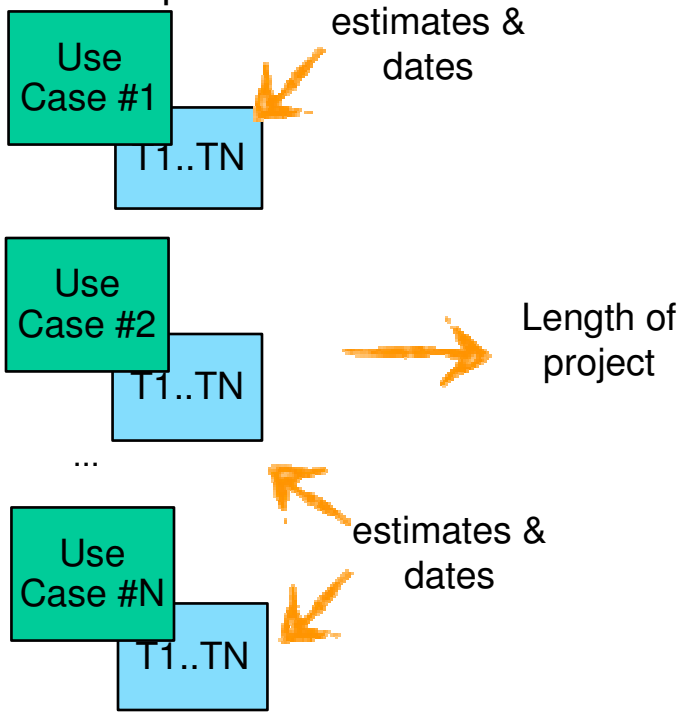


- Agile
  - Ranked Backlog (wish list, stack ranked)
  - Tentative Release Backlog/View
  - Sprint Backlog (commitment)
  - Sprint is immutable, Backlog isn't
  - Sized in Complexity Unit
  - Two Level Planning

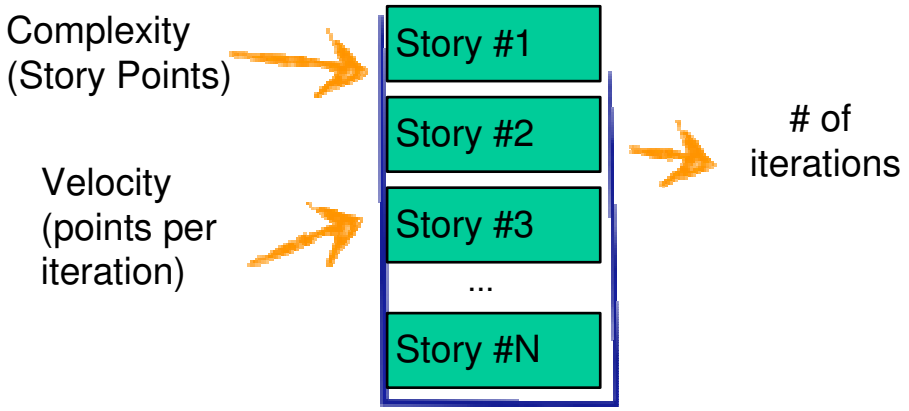


Differences in Scheduling (high level)

- Traditional
  - Requirements & Use Cases
  - Phases
  - Estimated in Hours & Computed Dates

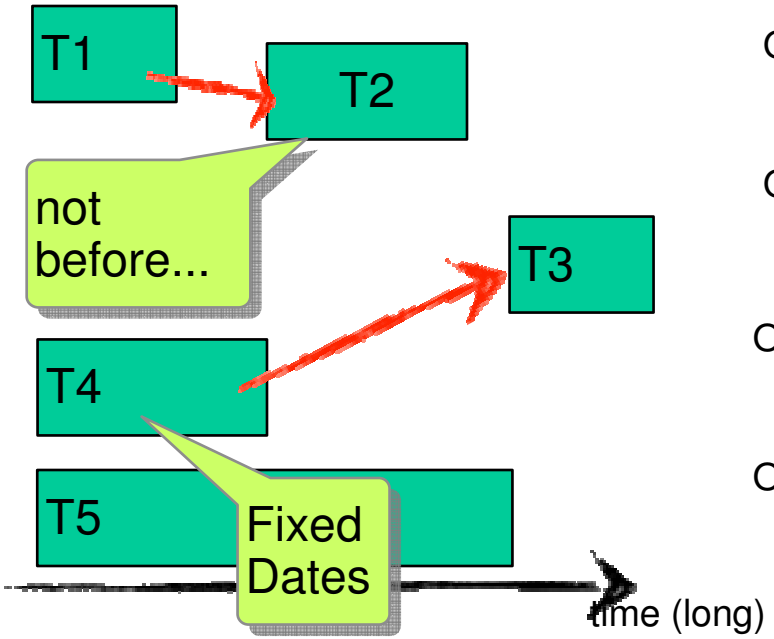


- Agile
  - Ranked Backlog
  - Complexity & Velocity
  - Release Iteration (optional, as view)
  - Many Sprints

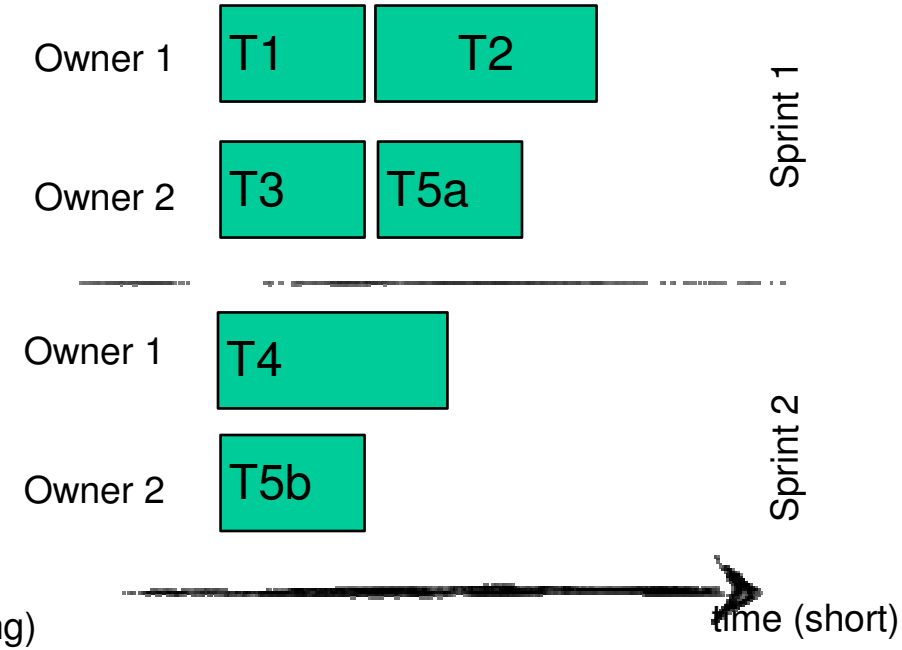


Differences in Scheduling (intra iteration)

- Traditional
  - Dates (start/end)
  - Dependencies
  - Long Phase
  - Long Tasks

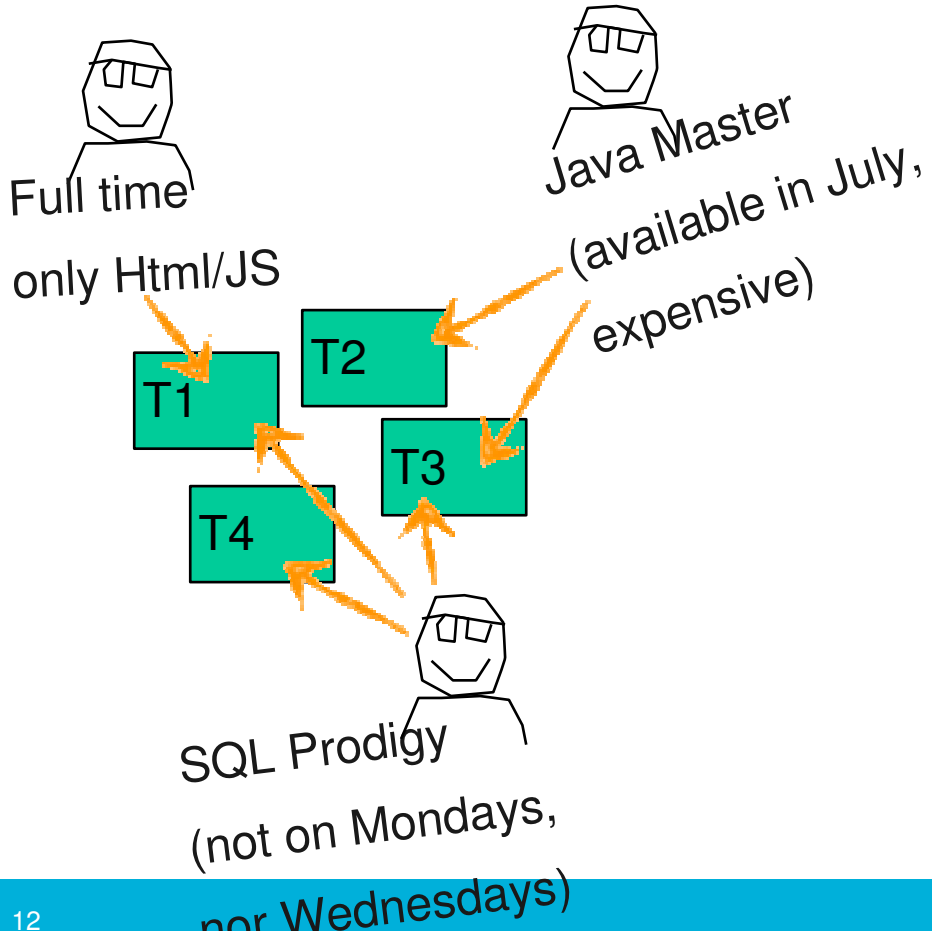


- Agile
  - Sequences
  - Dependencies (lightweight)
  - Short Sprints
  - Short Task (<1day)

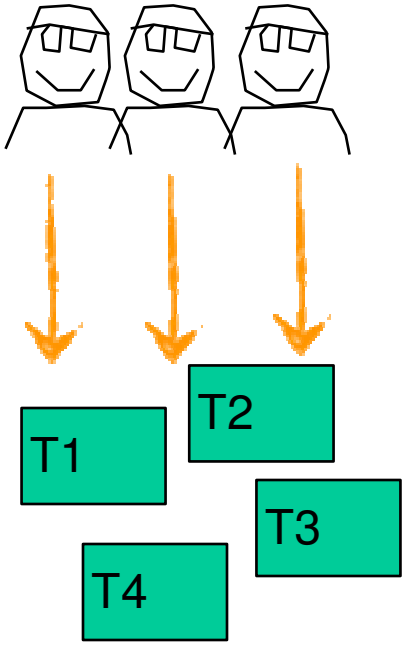


Different Handling of Resources

- Traditional
  - Specialists & Contractors
  - Time & Price constraints

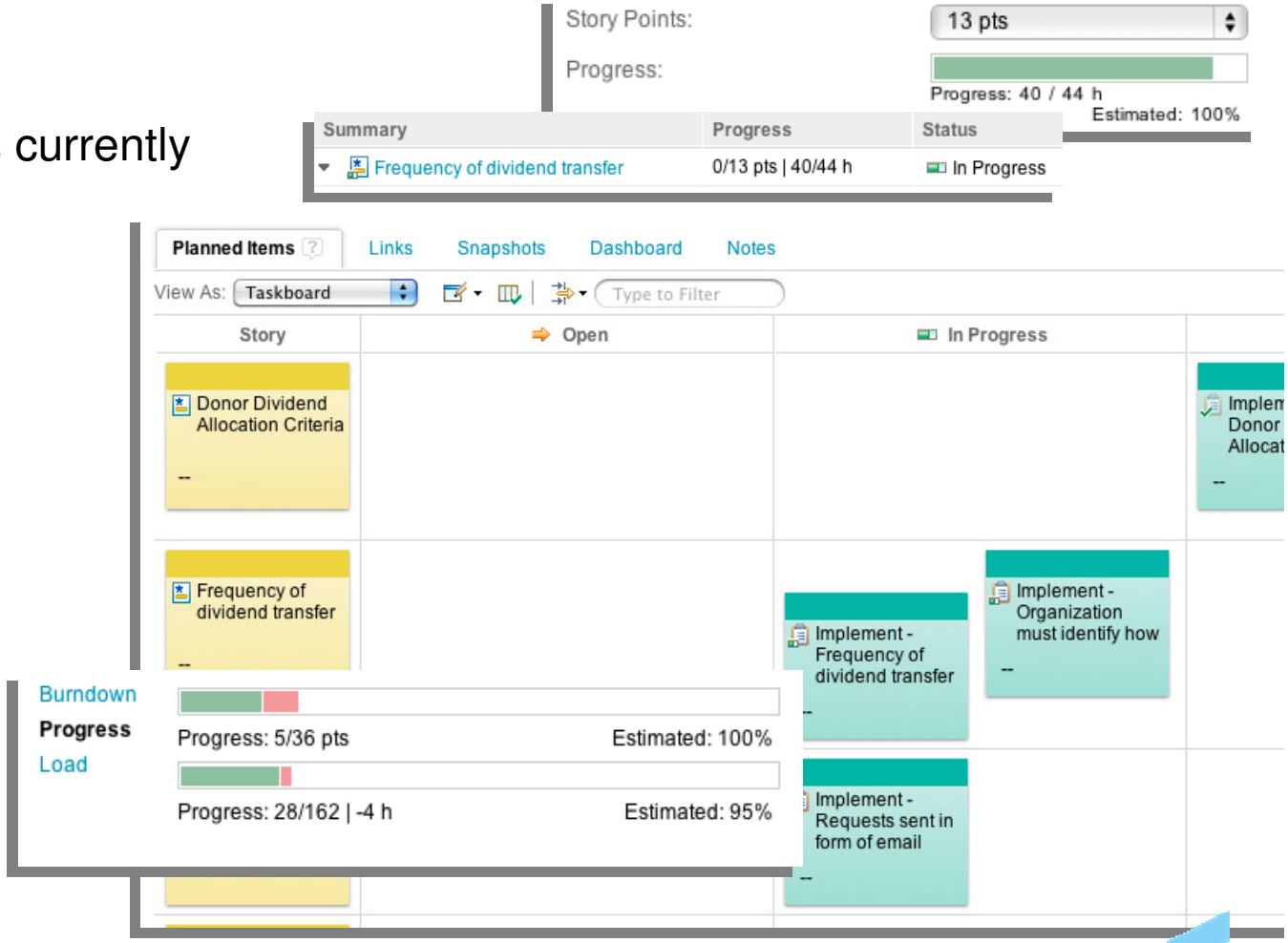


- Agile
  - Fixed team of all-rounders
  - Load & Progress



Mix & Match: Tracking Progress

- Taskboard
  - Lets you know what's currently being worked on
- Progress Bars
- Burndown charts
- Progress on Items



Mix & Match: Track Change

- Plan Snapshots
  - Capture the state of a plan
  - Compare the plan state
- Planned Time
  - Planned Time Variance

Planned Items | Links | **Snapshots** | Dashboard | Notes

Back to Snapshots

	Comparison - May 10, 2011 4:28:27 PM	Current Plan - May
Overview		
Iteration Start Date	0	Feb 7, 2011
Iteration End Date	0	Feb 25, 2011
Scheduled Start Date	0	Feb 3, 2011
Scheduled End Date	6 weeks 4 days 23 hours	Feb 25, 2011
Work Items Total	27	90
New	-48	0
In Progress	-4	0
Closed	79	90
Not Accessible	--	--

Planned Items | Links | **Snapshots** | Dashboard | Notes

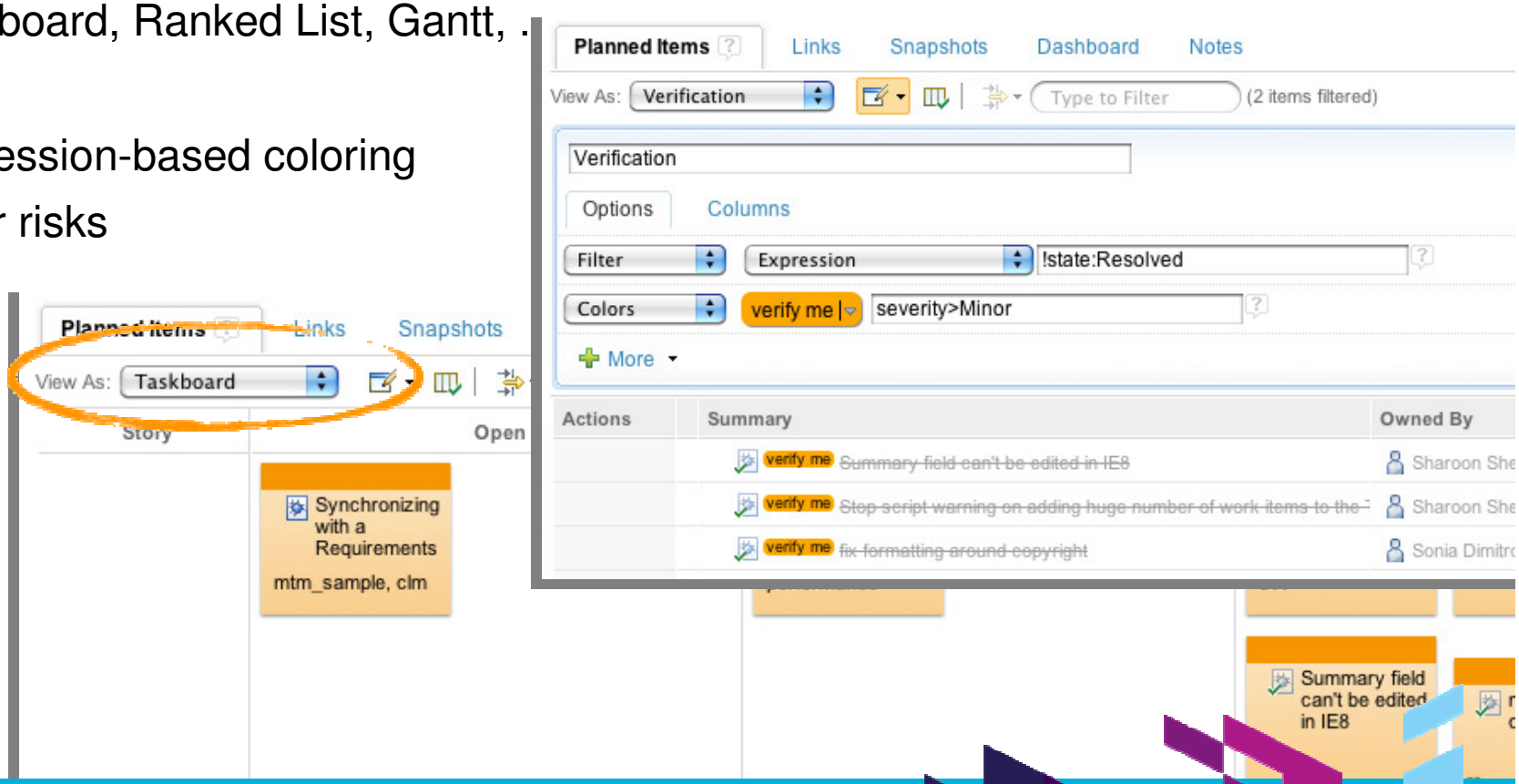
To perform a comparison, select two items from the list

	Name	Type	Modified Date	Created By
☑	Current Plan	--	--	--
☑	Almost the beginning of the Sprint	Regular	Feb 8, 2011	Johannes Rieken

Sounds traditional but helps Agile projects to answer 'How stable is my sprint?'

Mix & Match: Highlights & Task-oriented work

- View Modes
  - 'View As' your current tasks demands
  - Taskboard, Ranked List, Gantt, ..
- Colors
  - Expression-based coloring
  - Color risks



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