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Plan to Plan

PART 2: YOUR PLAN FOUNDATION

Written by: Kirk Hoaglund, Chief Executive Officer

As we continue to recover from the most remarkable year, our planning muscles are slowly getting back into shape. As I alluded to in my prior post, this has felt much like training for a marathon after time away from the sport. The experience and knowledge are still there but applying planning rigor feels a little harder right now. So, just like planning to train for a marathon, we have a Planning to Plan...Plan.

One of the most effective ways we've found is to establish a well-documented, well-understood project cadence. This has worked so well for us; a number of our clients have used our help to make the same happen in their projects. If you follow agile methods, you already have the skeleton of this available: the four agile ceremonies. I am not a huge fan of the moniker, but the elements themselves, whatever you call them, are important:

Start of Iteration: Iteration Planning Session

The team, the product owner, and the project manager (or scrum master) work together to agree on the set of work to be accomplished in this iteration. Our iterations are two weeks long. It is common to see iterations in the range of 2-4 weeks. At the end of the meeting, you must have a defined set of concrete objectives for this iteration. This session must occur at the start of every iteration.

During Iteration: Daily Standup

The team, the product owner, and the project manager meet to discuss the work completed in the prior day, the work planned for today, and any material deviations which need handling. This should be a rather tactical meeting confirming progress, to-dos, and challenges. This meeting kick-starts the day for the team. While some rare exceptions are allowed, this should happen at the start of every day.

At Iteration End or During Iteration: Review

A review allows the team to demonstrate to the product owner and stakeholders completed work. Along with the team, product owner, and project manager, pertinent stakeholders

should attend. There are two schools of thought concerning the review: an iteration review is performed at the end of an iteration showing all features completed during that period -or- shorter, focused reviews are added during the iteration demonstrating single (or few) items of progress. Our teams follow the second pattern. These sessions may be the most important of all.

At Iteration End: Retrospective

The team, the product owner, and the project manager meet to discuss the just-finished iteration. Observations are offered concerning the good, the bad, and the ugly: what went well, what needs fixing, and what failed. Transparency is key in this discussion. This session must end with a clear, documented set of actions that address deficiencies identified in the discussion.

You will find many discussions of these four, key agile ceremonies. There is plenty of information that will help you execute these effectively. Our teams create a planning grid for every iteration with days across the top and hours down the side. Each of these sessions is placed into the grid in a fixed location and that grid drives the cadence of the project going forward.

In my upcoming posts I will describe some additional grid elements that we add as needed by the peculiarities of the project, by outside dependencies, by related teams, or by reaction to unknowns. Plan to Plan, then Plan to Change.

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