

# Building agile tools using agile at scale: an inside look at how we plan work for Agile Central

Scott Nusz & Val Zolyak - Directors, Product Management  
CA Agile Central

# Business Agility



# Project to Product

## Legacy Mindset

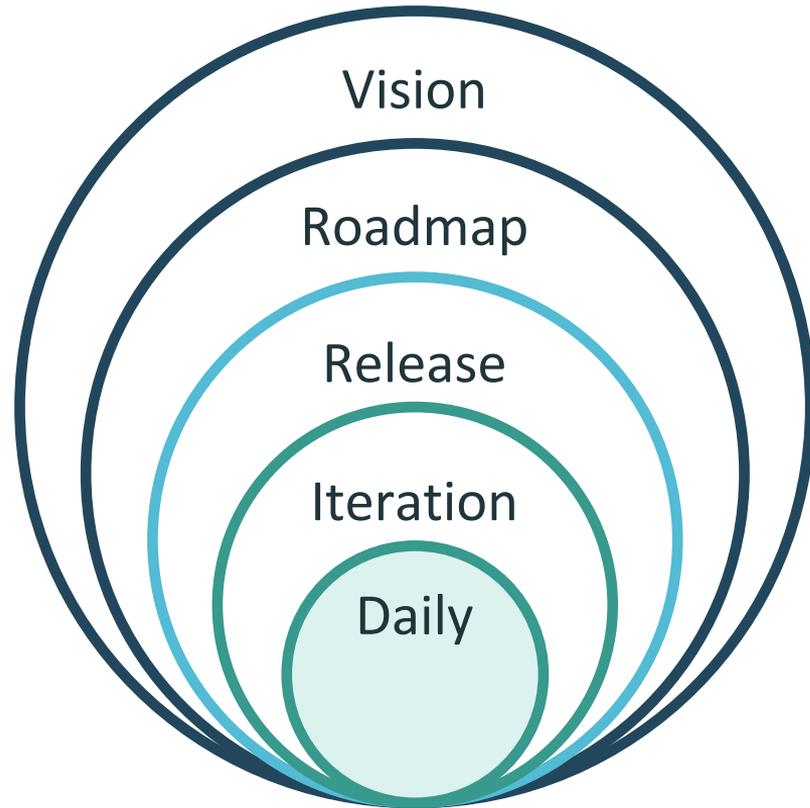
- Schedule-focused
- Yearly budgets
- Large upfront planning
- Track to plan
- Individual capacity
- Elastic resource pool
- Assign FTEs to projects
- Program = group of Projects
- Plan-Based

## Lean Thinking

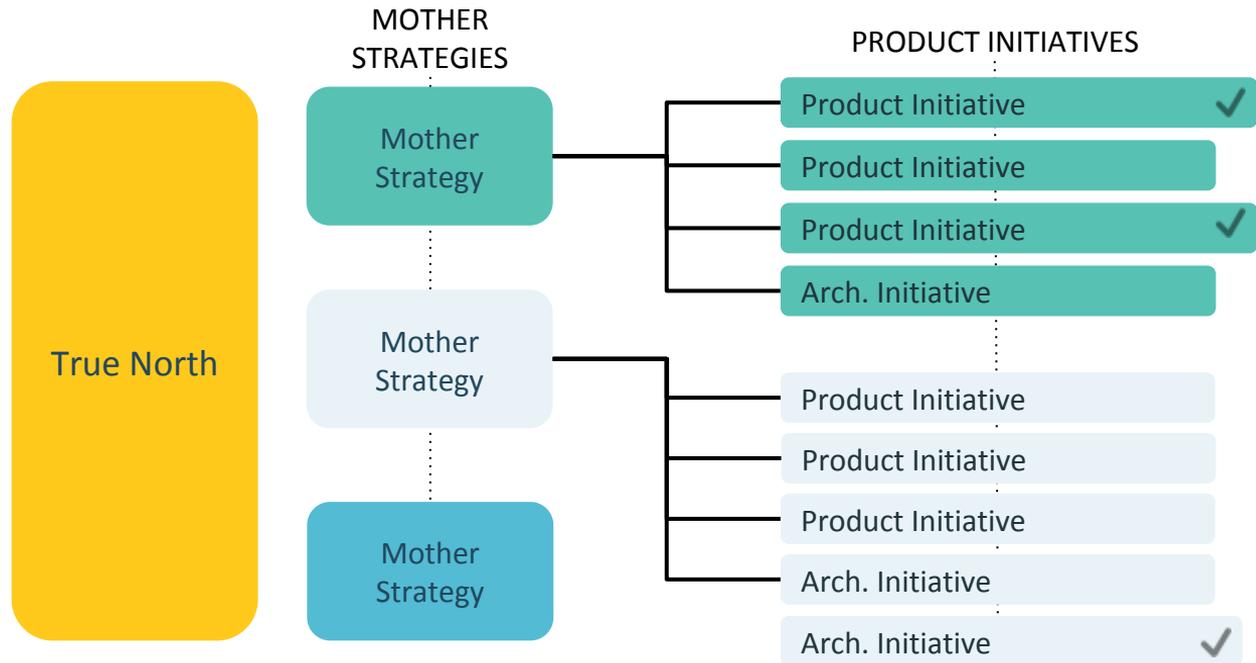
- Value-focused
- Incremental funding
- Continuous steering
- Plan to replan
- Team capacity
- (mostly) Fixed capacity
- Flow features thru teams
- Program is a group of Teams
- Adaptive

# Agile Product Management: **Iteratively working on the right thing at all levels**

# Multi-level Planning

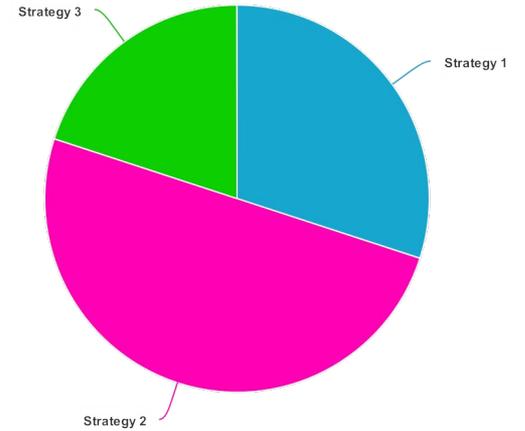


# Strategy



# Funding

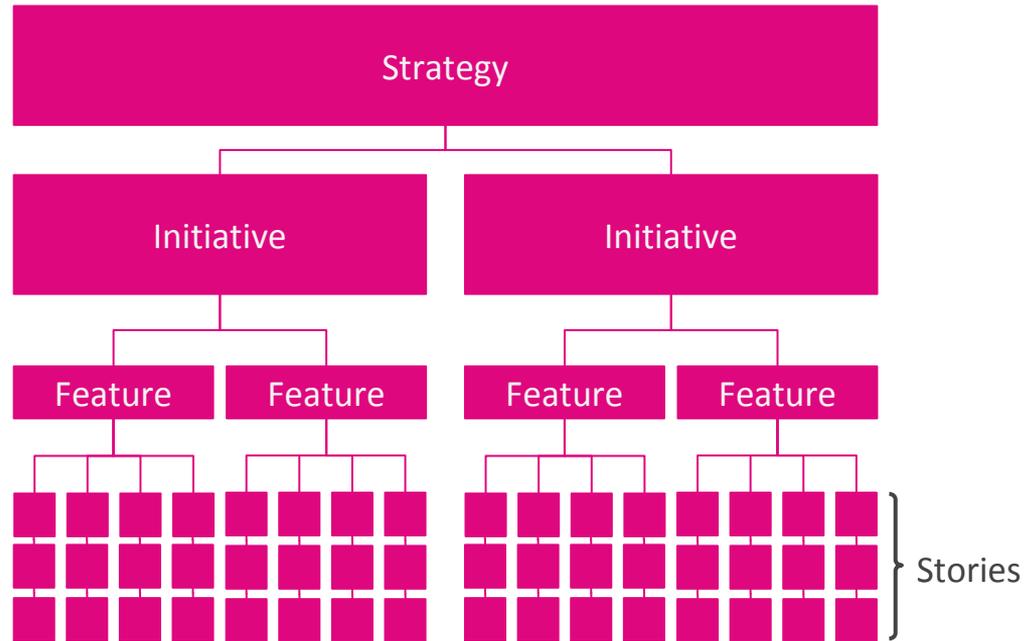
Executive Leadership



Product Leadership

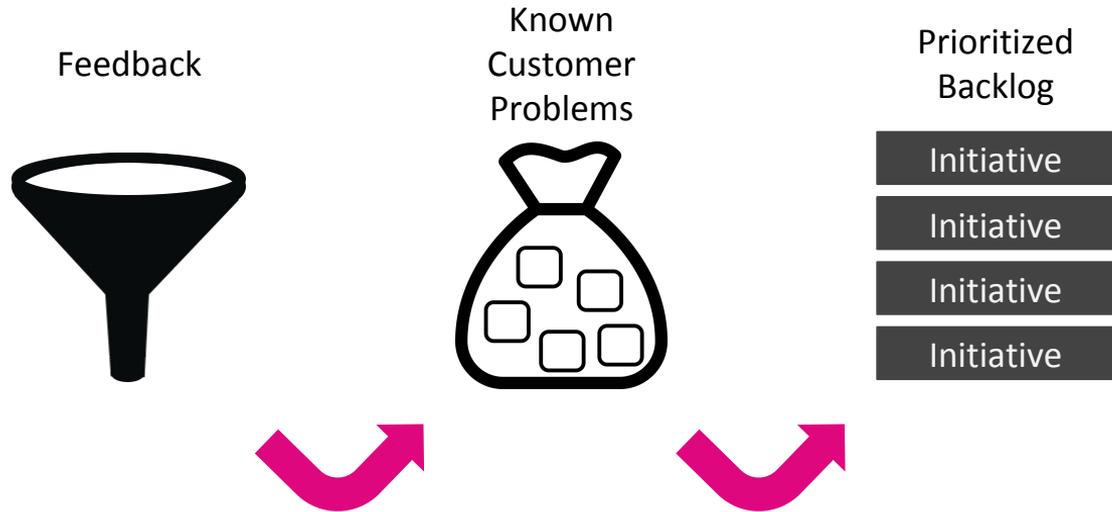


# Work hierarchy



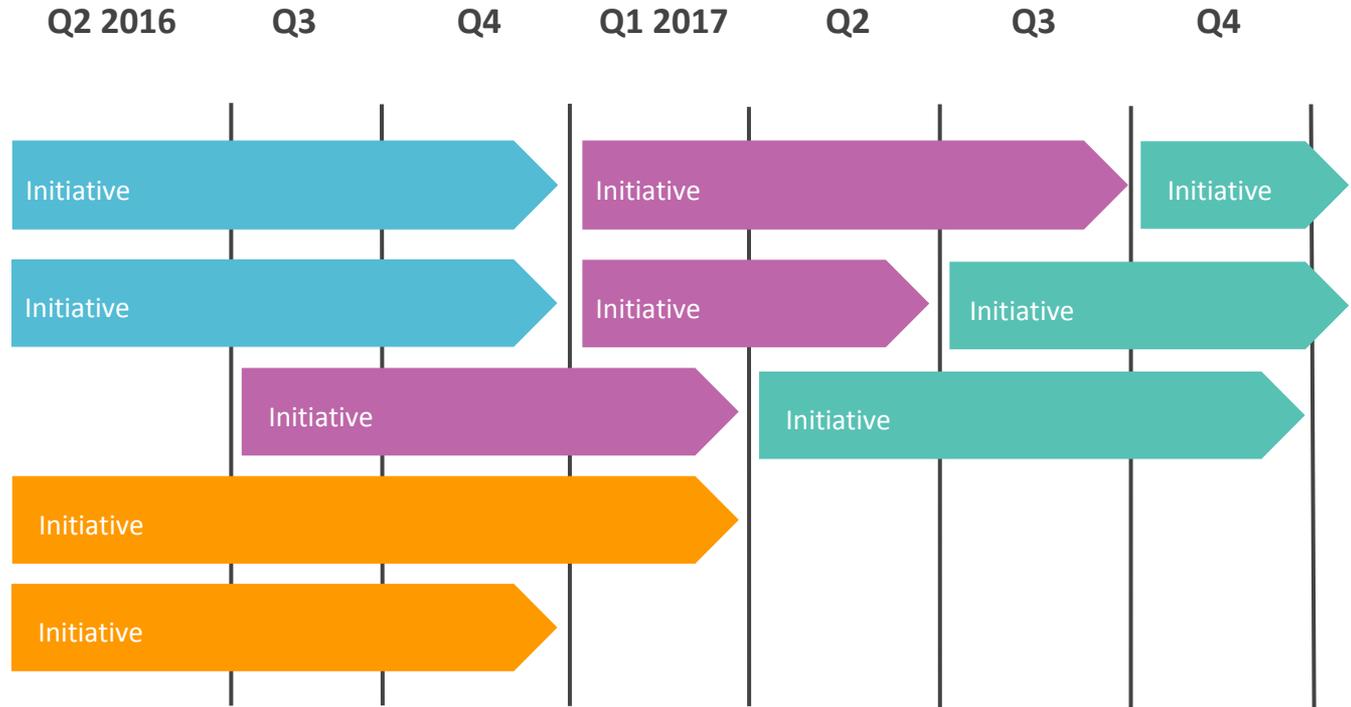


# Continuous feedback loops



# Initiative roadmaps

- Strategy 1
- Strategy 2
- Strategy 3
- Strategy 4

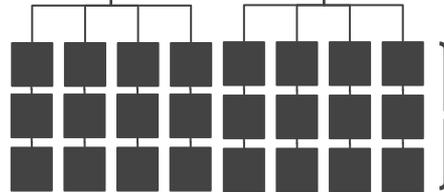


# Release planning

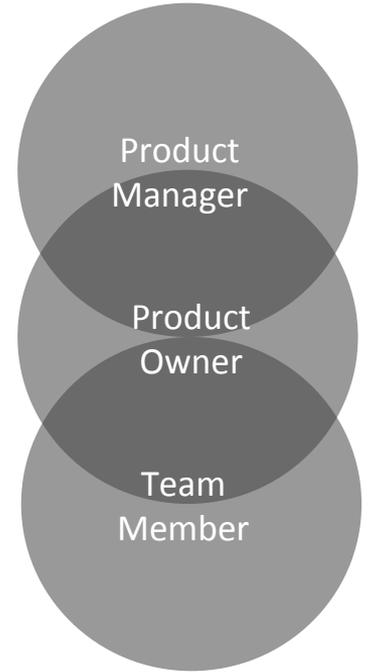
Pre-Big Room Planning



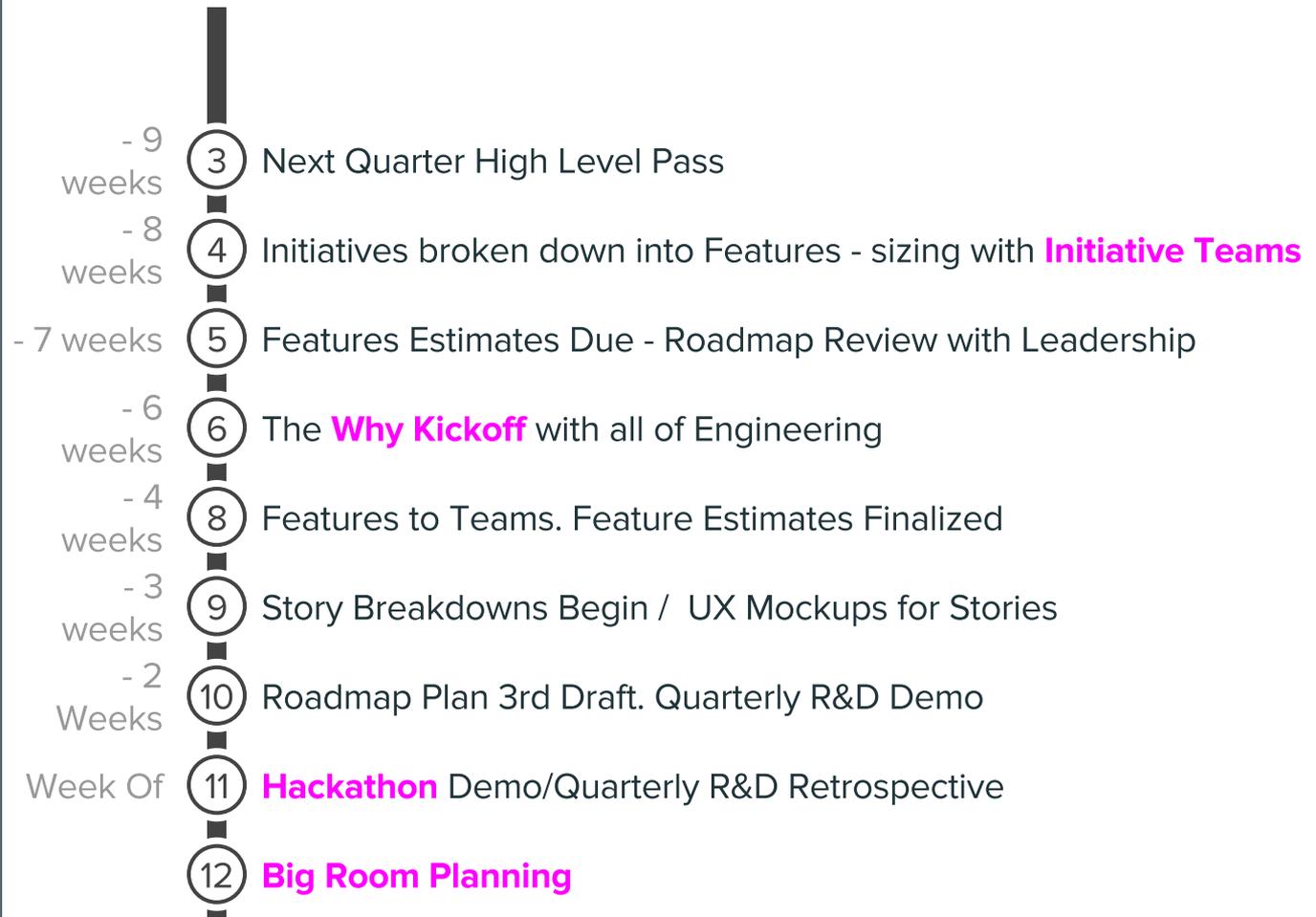
Big Room Planning



} Stories



# Calendar



# Portfolio Items

Consumer Site

Portfolio Items BETA Initiative

+ Add New

	RANK	ID	NAME	RELEASE	STATE	PROJECT	OWNER
	1	I1	Minimal online shopping site	--	Build	Consumer Site	Rachel
	2	I3	Personalized online shopping experience	--	Build	Consumer Site	Rachel
	3	I4	Modernize customer service portal	--	Build	Consumer Site	Rachel
		F2	Support write API	R2	Develop	API Team	Aaron
		US116	As a user I would like to update tickets	R2	--	API Team	
		US115	As a user I would like to update data	R2	--	API Team	
		US114	As a user I would like to post tickets	R2	--	API Team	
		US113	As a user I would like to post attributes	R2	--	API Team	Peter
		US112	As a user I would like to delete data	R2	--	API Team	Peter
		F5	Online chat support	R2	Develop	API Team	Aaron
		US41	As a user I would like to search for chat history	R2	--	API Team	
		US40	As a user I would like to delete a chat	R2	--	API Team	
		US39	As a user I would like to create a chat	R2	--	API Team	Dudley
		F12	Order Status 2.0	R2	Develop	Shopping Team	Peter
		F13	Rearchitect User Management	R2	Discover	API Team	Aaron
		F26	Realtime chat support	R3	Discover	API Team	Aaron
	4	I5	Maintain legacy purchasing system	--	Build	Consumer Site	Rachel
		F3	Extended Email-to-case integration	R2	Develop	API Team	Aaron
		F7	Email-to-case integration	R2	Develop	API Team	Aaron
		F8	Outbound SMS messages for support case updates	R2	Develop	API Team	Aaron
	5	I7	Integrate in-store and online experience	--	Prioritize	Consumer Site	Rachel
	6	I8	Integrate into Facebook	--	Prioritize	Consumer Site	Rachel
	7	I9	Integrate social into shopping experience	--	Prioritize	Consumer Site	Rachel
		F6	Realtime notifications	R2	Develop	API Team	Aaron

SHOW 25

First Prev 1-7 of 7 Next Last

# Capacity Planning

**Consumer Site** Search... ? 😊

R2 Done

PORTFOLIO ITEM TYPE: Feature | START RELEASE: R2 | END RELEASE: R2 Feedback

### PORTFOLIO ITEMS

ID	NAME	ESTIMATE
F1	Shopping Cart	M
F4	Saving profile	M
F9	Credit card payments	L
F10	Purchase path	L
F11	Priority shipping	L
F12	Order Status 2.0	M
F14	Creation of cart	M
F15	Special Offers	M
F16	Shopping history	L
F17	Online refunds	M
F18	Integrate with Paypal	M
F19	Integrate with WePay	M
F20	Refund management	M

### GROUP ALLOCATIONS DRAFT

Select Teams Summary Publish

GROUP	CAPACITY	DEPENDENCIES	LEAF STORY ROLLUP	GROUP EST	PRELIM EST	REFINED EST
Shopping Team	25					120%
F1	Shopping Cart	0	52 Points (13)	2	M	0
F4	Saving profile	0	21 Points (5)		M	0
F12	Order Status 2.0	0	79 Points (19)		M	0
F14	Creation of cart	0	22 Points (4)		M	0
F15	Special Offers	0	13 Points (4)		M	0
F16	Shopping history	0	22 Points (6)		L	0
Fulfillment Team	15					73%
Payment Team	20					40%

# Cutlines

**Consumer Site** Search... ? 😊

R2 Done

PORTFOLIO ITEM TYPE: Feature | START RELEASE: R2 | END RELEASE: R2 Feedback ?

**SELECTED PORTFOLIO ITEMS** Edit Items ↔

ID	NAME	PARENT	DEPENDENCIES	LEAF STORY ROLLUP	GROUP EST ROLLUP	PRELIM ESTIMATE	REFINED ESTIMATE
F1	Shopping Cart	I1: Minimal online shopping site		52 Points (13)	5	M	
F4	Saving profile	I3: Personalized online shopping experience		21 Points (5)		M	
F9	Credit card payments	I1: Minimal online shopping site		82 Points (17)		L	
F10	Purchase path	I1: Minimal online shopping site		0 Points (0)		L	
F11	Priority shipping	I1: Minimal online shopping site		23 Points (7)		L	
F12	Order Status 2.0	I4: Modernize customer service portal		79 Points (19)		M	
F14	Creation of cart	I3: Personalized online shopping experience		22 Points (4)		M	
F15	Special Offers	I3: Personalized online shopping experience		13 Points (4)		M	
F16	Shopping history	I3: Personalized online shopping experience		22 Points (6)		L	
						95% (-3)	0% (-60)
F17	Online refunds	I1: Minimal online shopping site		0 Points (0)		M	
F18	Integrate with Paypal	I1: Minimal online shopping site		0 Points (0)		M	
F19	Integrate with WePay	I1: Minimal online shopping site		0 Points (0)		M	
F20	Refund management	I1: Minimal online shopping site		0 Points (0)		M	

# Big room planning



# Roughly Right

The screenshot displays a dashboard for 'Consumer Site' with the following components:

- Header:** 'Consumer Site' title, search bar, and user profile icons.
- Release Info:** 'R2' release label, 'Done' button, and 'Feedback' button.
- Filters:** 'PORTFOLIO ITEM TYPE' (Feature), 'START RELEASE' (R2), and 'END RELEASE' (R2).
- PORTFOLIO ITEMS Table:**

ID	NAME	ESTIMATE
F1	Shopping Cart	M
F4	Saving profile	M
F9	Credit card payments	L
F10	Purchase path	L
F11	Priority shipping	L
F12	Order Status 2.0	M
F14	Creation of cart	M
F15	Special Offers	M
F16	Shopping history	L
F17	Online refunds	M
F18	Integrate with Paypal	M
F19	Integrate with WePay	M
F20	Refund management	M
- GROUP ALLOCATIONS Table:**

GROUP	CAPACITY	Progress	Percentage
Shopping Team	25	[Progress bar]	88%
Fulfillment Team	15	[Progress bar]	73%
Payment Team	20	[Progress bar]	80%
- Item Allocation Table:**

ID	NAME	DEPENDENCIES	LEAF STORY ROLLUP	GROUP EST	PRELIM EST	REFINED EST
F9	Credit card payments	0	82 Points (17)		L	0
F16	Shopping history	0	22 Points (6)		L	0

# Feature Breakdown

**Fulfillment Team**

Team Planning **BETA**

RELEASE: < R2 2016-10-22 - 2016-12-16 >

**FULFILLMENT TEAM BACKLOG**

Group by Feature in Release

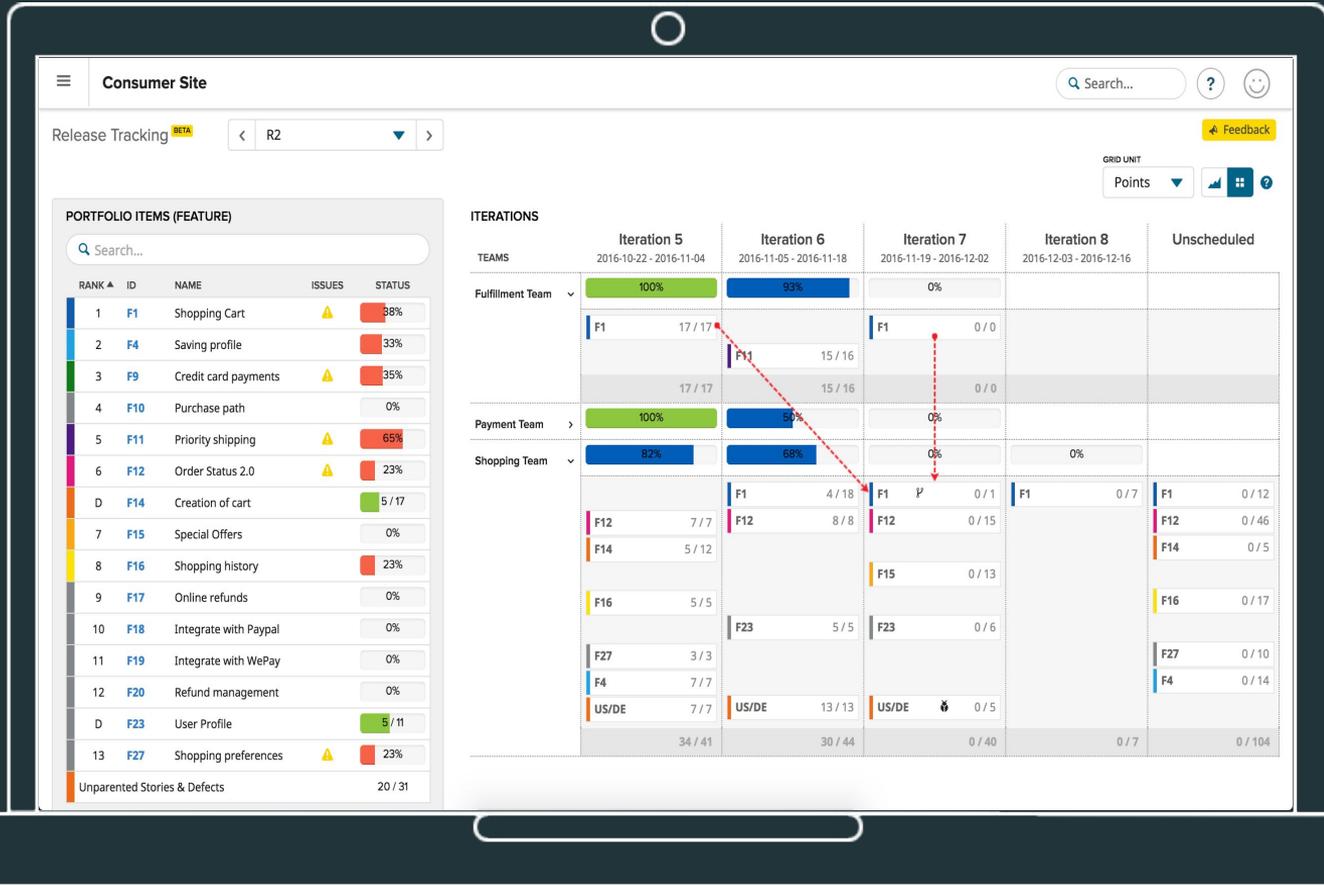
- F1 Shopping Cart
- F11 Priority shipping
  - ID NAME EST
  - US66 Ship Single-Site Order 5
  - US63 Data fields for Shipping information 2

**FULFILLMENT TEAM PLAN**

ITERATIONS	DATES	ISSUES	VELOCITY
Iteration 5	10-22 - 11-04	20	85%
Iteration 6	11-05 - 11-18	20	80%
Iteration 7	11-19 - 12-02	22	0%
Iteration 8	12-03 - 12-16	22	0%

Release Backlog (0 items)

# Program View



# No More Spreadsheets...



# No More Stickies...



# No More Strings

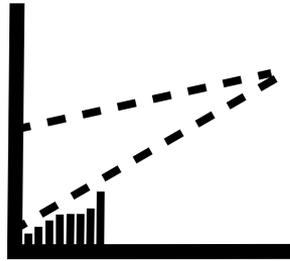


# Feature roadmaps



**Execute  
within the  
release**

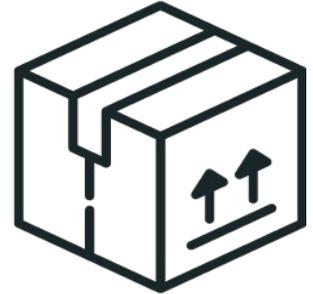
Track



Steer



Ship



# Repeat!

