

Key Ideas Behind Agile Planning

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Iterative and Incremental

September 8, 2020

When we start the work (and the plan) we do not know everything.

As I have suggested, if we know half of everything we need to know (to have a perfect plan) that, in my experience, would be a better-than-average start.

So, we start.

And we start with the notion that the plan will never be perfect, but all the time (every sprint) we can try to learn. Then we use that learning to improve the plan. Make it less inaccurate.

So, we revise the plan iteratively and incrementally.

What is the plan? It is essentially the product backlog, laid out into Sprints and releases.

So, what do we do to improve it?

Well, anything that we think will help.

This might include:

- More research (I assume that some research was already done)
- Breaking down stories (or epics)
- Learning from Demos
- Getting the up-to-date Velocity
- Innovating on product design
- Getting to know the customer, the situation, the journey, the problem – better

The work might be led by the Product Owner, but anyone on the Team or even Business Stakeholders or others might do the work. That is, learn, and share that with the Team.

The Team (all 7 of them plus the Business Stakeholders) should easily learn enough in 2 weeks to improve the plan significantly.

By learning about (among other things):

- The Future (part of which is not the past)
- The Customers
- The problem
- The technology
- The Team itself

- The needed features
- Business Value
- The competition
- The market
- The legal-regulatory environment
- The user experience and what it might be
- Lean Start-up (or similar ideas)
- Risks and Impediments
- Who else might help
- The expected help that is not now coming

Then, iteratively and incrementally, every sprint, we can revise the plan.

Planning, Not the Plan

August 13, 2020

There are people in Agile that call themselves the “no-estimates” group. They hate “planning” that used to crush people. And, at least, this is how planning is perceived sometimes. But they overreact.

Yes, they are right that planning should never be used to put people under a lot of pressure—certainly not to crush people—but life always includes time-boxes. So, something must be done (delivered) with a specific time-frame, often.

So, we *favor* planning. (And we have a number of more specific ideas and suggestions around that.)

The Dwight Eisenhower quote is: ***“In preparing for battle I have always found that plans are useless, but planning is indispensable.”***

That is the context of war and battles, but I think the metaphor translates well for our work. It is much more about what comes out of the planning process (many things) than about the plan (which, even if revised, is still certain to be notably wrong).

Openness

August 13, 2020

One of the key ideas behind planning is **Openness**.

What does that mean? Many things. Let's list a few.

- Everyone can see it... the current state of our planning.
- Everyone can voice an opinion... within a reasonable time-box. "It's too long, it's too short, too big, too small, too cheap, too expensive..." as examples. And not just a summary, but also why, and perhaps their proposed changes.
- Openness is not contradictory to the idea that (my quote) *"if you wait for perfection, you might wait too long."* That is, we need to decide with imperfect and incomplete information—with the information we have—and fairly quickly.
- Openness must be balanced against "fairly speedy," but we expect Openness to allow better information and better analysis to emerge.

Here are a few more:

- The plan itself is open and so is the process of planning. Everyone (that needs to be) is aware of the process and typically can participate.
- We are "open" to new ideas. That is, we are open to changes (e.g., exogenous, outside the Scrum Team) and learning. Or, more specifically, new ideas about the best MVP (minimum viable product).
- Openness does not deny the value of "sticking to the plan." You should try to deliver something specific, and remain fairly focused on that, so that you do deliver. If not, you may deliver it late, or with lots of features customers do not want, etc.
- So, to use another term from the Scrum Values, Openness must be balanced with Focus, or maybe you prefer Commitment.

Speedy

August 13, 2020

General George Patton said: *“A good plan violently executed now is better than a perfect plan executed next week.”*

Part of this is an acceptance that all plans are imperfect and are based on incomplete information, including incomplete information about the future.

We do the best we can to plan in a quick time-box, and then we execute. In or from that execution we learn new information that guides us toward the revisions to the next plan. So, at least one cycles of **Plan – Do – Check – Act** should be rather short.

In Agile, we think of at least three (or normally at least three) cycles: The Day, the Sprint (maybe 2 weeks), and the Release (maybe 3-6 Sprints). *(Yes, there can be other higher-level cycles also.)*

We might consciously revise The Day’s plan, but we will revise the Sprint Plan (a.k.a., initially, the Sprint Backlog) and the Release Plan many times—possibly as often as on a daily basis.

So, planning must be done in a way where those plans can be easily revised.

Prioritize Our Stupidity

August 13, 2020

We could phrase this as “prioritize our learning,” but I find it fun and a good chuckle to be humble enough to admit we are stupid. Human beings, at least in regard to planning, are stupid in two ways: **(1)** incompletely informed, and **(2)** we just do stupid things. But I am referring particularly to the initial “lack of knowledge.”

For example, the fact that we are not fully informed about the future is no great surprise, or about the fact that things will change—again, no surprise. But we do not know (or remember) all the information currently available in all the domains that could make our plans more effective.

Equally, we do not agree with the cynical view that “we know nothing” or, slightly more realistically, that (a) we know so little, or (b) things are going to change so much that doing an initial plan is useless. We know something today, and by working together on a first draft plan, we can discover more where we are confident in our knowledge, and where we want to learn more.

What kinds of things do we not know (enough)?

Some examples:

- The future
- Our customers
- Our customers’ needs and wants
- Changes to our customers’ needs and wants
- The customer journey (or the process)
- The competition
- The market
- The technology
- The legal, regulatory, and compliance environment
- The Scrum Team itself
- Surprises that we are about to hit

And that’s just a start.

Now, we know or, to some degree, can anticipate (guess at) some of these, but these are areas where we can always be learning; catching up with the past and seeing further into the future.

By prioritizing our learning, we hope to learn faster than the competition. And the learning should enable us to revise the plan, so that we can execute more effectively.

It is not about just one of these, but all three together: learning, (re)planning, and execution.

Get Everyone Involved

August 17, 2020

OK, it sounds good, get everyone involved. But what does it mean? And why do we suggest it?

It means many things. Here are some:

- Everyone gets to contribute. Eleven heads are better than one.
- Get everyone on the same page at the same time.
- Visibility. Everyone can see it at the same time.
- We can share the tacit knowledge. We can now all know what we all know about the whole thing in all dimensions.
- Everyone includes the whole Scrum Team and the Business Stakeholders. I recommend 7 + 4.
- The broader team gets a chance to decide *together* whether this will work and how this will go.
- Everyone is heard from the get-go.
- Less pressure on any one person.
- Hence, each person is more free to imagine and to reveal what he or she really thinks.

One of the results:

- If they plan it together, they are more likely to make it happen together.

That does not mean it will happen (many other factors) and does not mean it will happen according to plan. In fact, probably not according to the original plan. But it is more likely to happen better.

What is the reason we would consider an opposite approach (such as a waterfall approach)? So, in this context, “waterfall” appears to say that the planning should be done by a small group, even one person. Yes, they might suggest (and actually follow-through) in having that small group talk with others. But the planning is done by the one person or the small group.

Why consider doing it that way?

One reason is: It is more efficient.

For example, to have two people work on the 6-month plan over 3 weeks. Well, that might be more efficient in terms of person-hours perhaps, but a lot of elapsed time is lost. And the other values (e.g., everyone working together) are lost.

Responding to Change

August 19, 2020

The line from the Agile Manifesto is: *“Responding to Change over Following a Plan.”* But let’s take this further in two main ways.

1) Change can be good.

To me, in Waterfall, we always thought of change as bad. It was mainly bad because it forced us (eventually) to change the plan which was a lot of trouble. But also, we just thought of change as bad.

In Agile, the attitude is that change can be good. Clearly a Category 5 hurricane coming right at your city is not good. So, we do not have a childish notion that all change is good. But any learning, and other things also, can be good changes.

As the Agile Principles suggest, we want to maximize the benefit of good changes.

2) Adapt to change quickly.

This second notion is different. The key to this idea is that your customer needs and wants you to respond to change quickly.

Otherwise:

- Too much pain
- Competitors can beat you up
- Losses can be too great
- We will be overwhelmed by multiple changes hitting “at the same time”

And maybe the last item is not so much the changes hitting us at the same time, but rather that we still need to respond to too many changes at one time.

Further: I think customers expect businesses (and other organizations) to respond quickly (customers in their real lives certainly must). So, our organizations are perceived as better or worse based on how quickly (and effectively) we respond.

And the next step.

I think people now view things this way.

1. No one responds to change perfectly, BUT...
2. Some organizations seem always to be reacting to change and recovering, WHILE...

3. Other organizations are driving change (mostly in a good way)
4. Some organizations are driving change or responding quickly, but the net result is not as good as we want.

So, in general, I think people are raising the bar for responding to change.

They want you to be:

- pro-active
- more ahead than behind
- with a pretty good solution
- and, when you make mistakes, fix them quickly
- and, enable ME (the customer) to have a better life (e.g., look at the wider impact of that adaptation)

Adapting Better

August 20, 2020

In 2001, “Responding to Change over Following a Plan” seemed like a pretty aggressive step. *(That is the last of the four Agile Manifesto lines.)* Today, from a customer’s viewpoint, **it is not enough.**

Customers want a better adaptation to change, and not just attitude or relatively obvious things like more or faster releases. They want all of that, and they want it to be more effective, more meaningful, and they want the product to integrate into their lives comfortably.

I am not saying customers currently feel they are getting this—maybe somewhat close with a few companies—but I think this is what they want.

My feeling is that customers in general are dissatisfied. They mainly think things such as:

- “It’s an interesting innovation, but how does it fit?”
- “The technology makes me feel de-personalized.”
- “It’s supposed to help me connect with people, but I feel overall more disconnected.”
- “Why is this damn stuff so non-intuitive?”
- “I want my privacy back.”
- “How does being connected to a bunch of people I don’t know really help me? I do not want all these extra connections. I want the connections I have to be more meaningful!”
- “Why are we all so rude on these ‘great’ social media platforms?”

Yes, some of those comments accent the negative side. There are positives. There still is some fun in technology. People do like seeing pictures of their friends. But...

Here are a few implications of what I am saying:

- Business and Technology must plan and execute together.
- A new product must fit in with all the other changes going on.
- It is essential that you prioritize the change (the solution) from the customers’ viewpoint.
- As you roll out change, it must be coordinated with everything in your company.

Let me explain this last statement particularly. So, the real meaning might vary a lot, depending on the nature of your company, its products, its customers, and its competition.

But as an example, imagine you have (a) ideation people, (b) front-end people (e.g., sales, fulfillment, etc.), (c) innovation people (who create new products or solutions), (d) back-end people (e.g., support or back-end processing), and (e) production people (people who use the product to deliver a service, or who build the new widget in volume).

First thing, many companies are kind of set up this way, and, of course, many are not. This is just one example. But my main point is that all five areas must be coordinated so the aggregate introduction of change makes sense and everything fits together. Put another way, people in all those groups must collaborate. (And typically more groups as well.)

The approach to planning and execution must include collaboration and change across a wide variety of groups. Some of those people are the Scrum Team.

