Webinar: Concepts of Agile Planning - V5

Why do we do the things we do.

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Joseph Little. **November 9, 2026**

Concepts of Agile Planning

Agenda

- Goals
- Concepts
- Some actions (which reveal or embody concepts)

- Questions!



Basic, Often Unspoken

- “Everything changes, nothing remains the same.” Buddha
- We accept there is lots of change. That is relevant.
- We have to adapt better to all of these changes. Multi-dimensional.
- “Adapt or die”
- (Do we accept this at the right level? To some degree: NO.)



Goals

A. Higher motivation and morale

B. Less stress

C. Adapt to change better (eg, vs competition)

D. Better product

E. More business value

F. Enable more & faster Learning

G. Less re-work

H. Fewer “wrong” mistakes

I. Faster delivery (than what?)

J. Enable continuous improvement (eg, of plan). Every Sprint!

K. “Do I stay or do I go?”

L. Respect the DATE

M. Improve relative accuracy faster

N. More clarity about the Future

O. We’re all on the same page

P. Build more what they will want in the future (and less of what they won’t want)



Problems - 1

- Too much stress already
- Poor understanding of and visibility about BV
- Classic problems re “what does the customer want in the future”
- Formerly?: “No-change control board”
- Managers imply they want no failure, but it is by failure we learn fastest
- “No re-work” sends the wrong message



Problems - 2

- Problems with saying “Faster” (stress, less quality, etc.)
- Fantasy that we already know everything. Not expecting to learn
- Deliver faster than ? (no direct comparison)
- Weak continuous improvement culture
- Customer <u>should</u> negotiate the DATE
- Minimal concept that the customer can adapt as we learn (eg, ok with date change if told soon enough)



Problems - 3

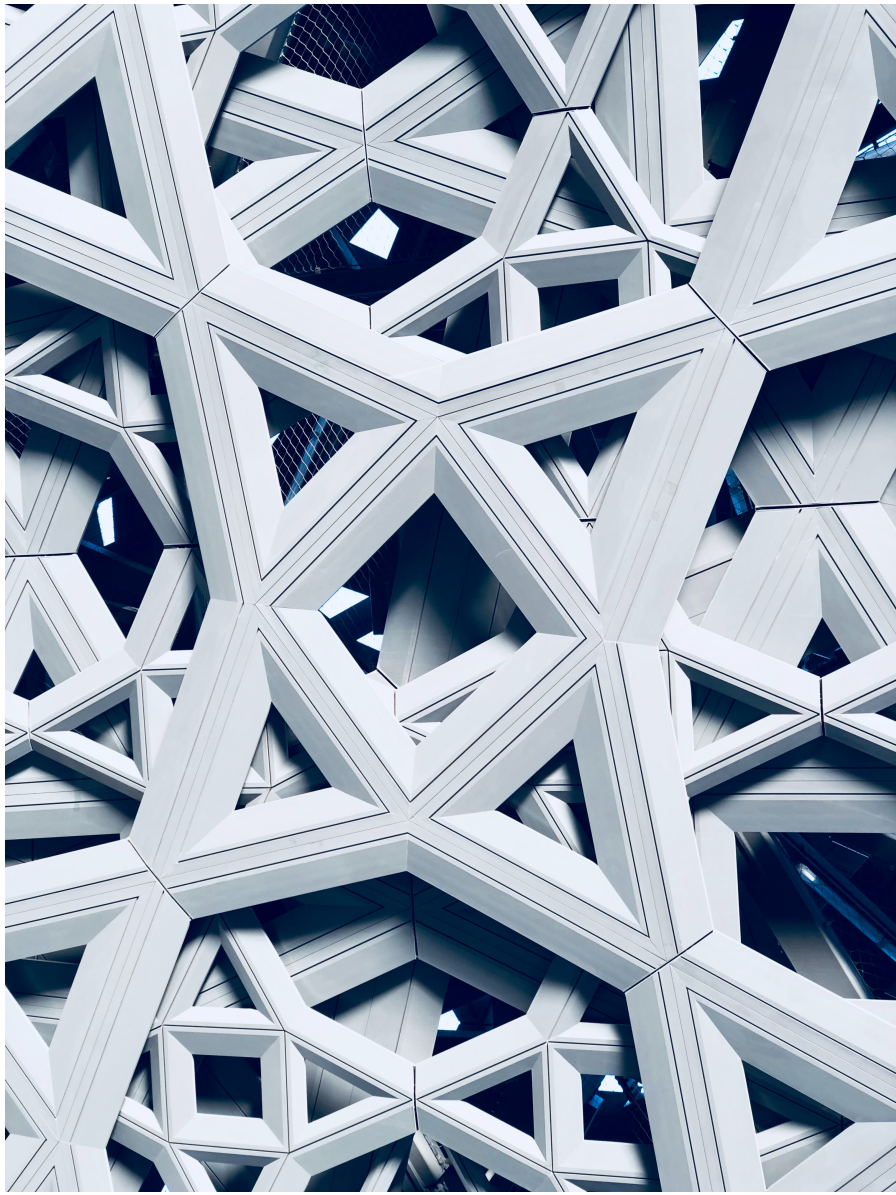
- Old thinking: Build what they asked for 6 mos. ago.
- Waterfall planning: Plan the work, and work the Plan (don’t change the plan)
- Very restricting contract or “contract”
- New thinking: Build what they will want / need over product lifecycle



Basic Concepts

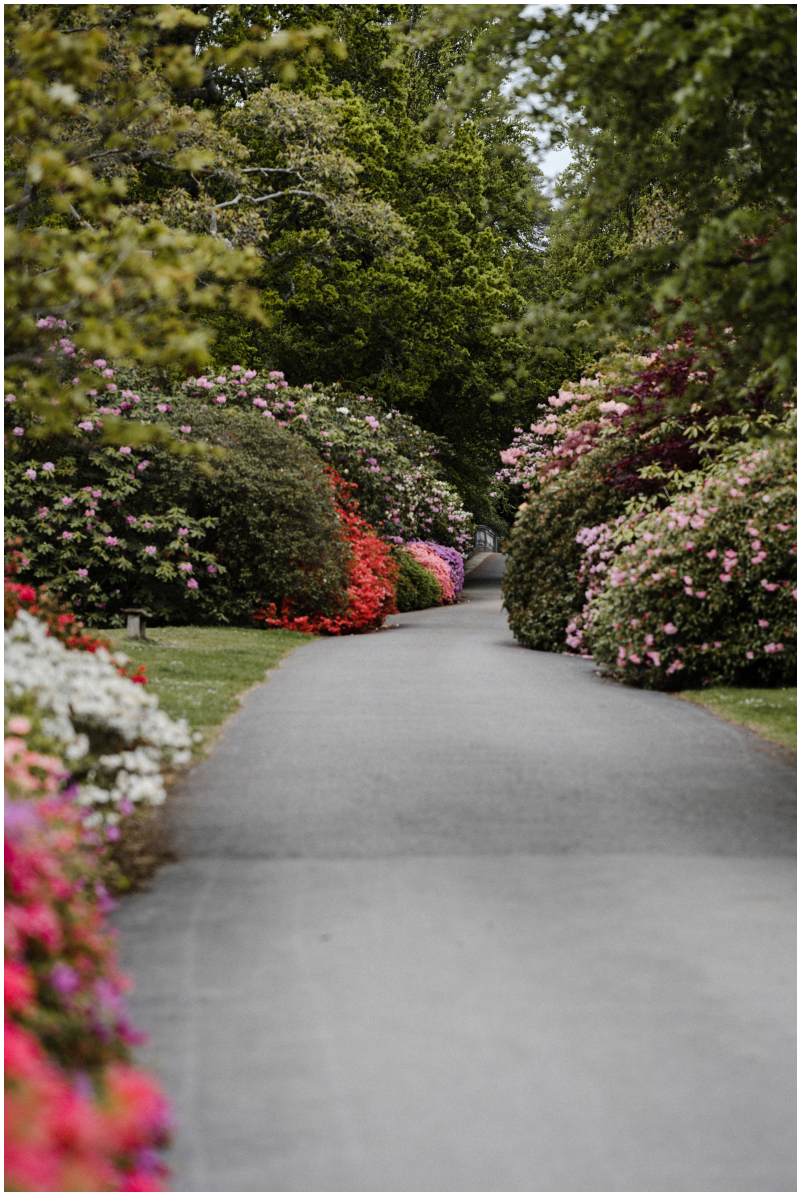
Caveat

- We are assuming a normal situation (at least sometimes)
- Your situation is almost always special and unique, to some degree
- So, we can try to discuss that issue.
- You decide if each concept applies in your case.



Concepts - 1

- overstressing reduces the capability of the system (in our case, the Team is the system). [This idea is a key Lean principle.]
- knowledge workers, particularly, perform better as a Team under Eu-stress (good stress), notably worse under high stress.
- as a team, we know some things. We have some of the knowledge to be successful. No one person knows everything. We are knowledge workers, and can learn
- always re-plan. To identify the results of all you have learned so far



Concepts - 2

- every prediction or guess about the future is a SWAG: Strictly Scientific Wild A** Guess. "To predict is difficult, especially about the future."
- we can make a SWAG, or a series of SWAGS, and start to approximate what the future will bring
- one of the best ways to learn is by building the product. We show the working product, and get feedback
- actively decide where to learn. Then use that learning to (a) build better product, and (b) re-plan



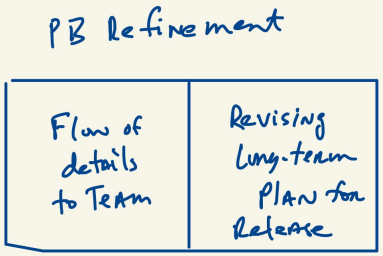
Concepts - 3

- Ai will make re-planning more necessary and even more useful. But Ai is only PART of it; the Team uses all its senses (including common sense)
- making guesses about the future causes us to think. Comparing expected with actual gives us insights into missing knowledge
- innovation is inherently very wasteful. It is acceptable if (a) we learn a lot from it, and (b) we are less wasteful than our competition
- normally, first to market with something good-enough is better than a perfect product later. To have a truly perfect product implies an infinite amount of delay.



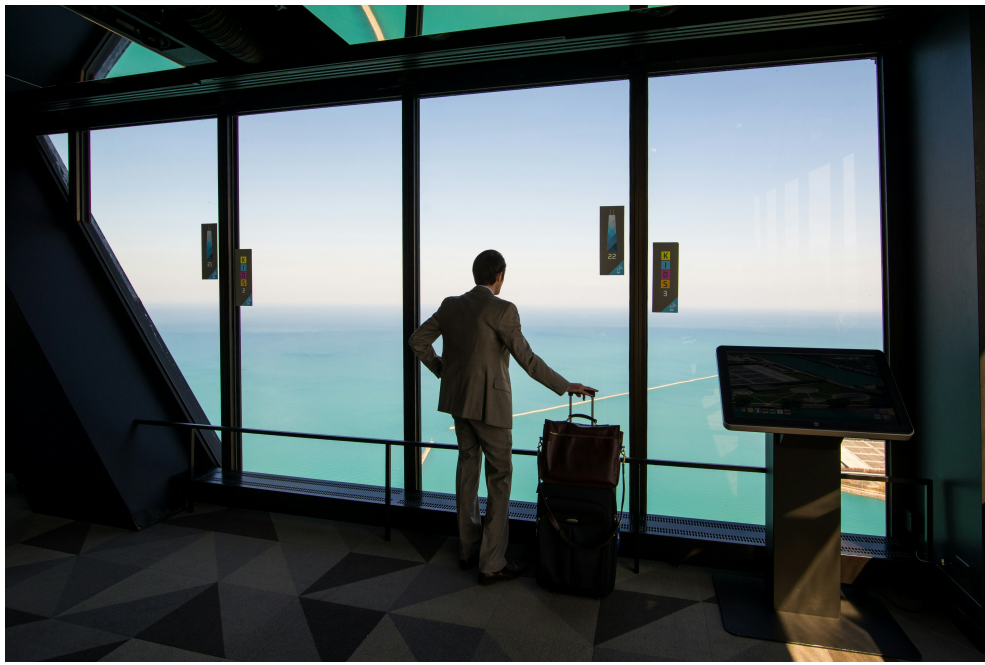
Concepts - 4

- the knowledge needed to make better prediction is, commonly, also the knowledge we need to build a better product
- the customers do not see the features as having equal value. Similarly, no customer fully understands the product "that the market" needs. No two customers agree now on what the product should be. Part of our value-add is bringing the customer community toward a consensus of what the product should be
- part of the "value proposition" is cost. In other words, a simple version of value is V = benefit / cost. Roughly, ROI.



Concepts - 5

- a good rough proxy for cost is how much team time it will take to build that feature or user story
- so, to maximize what we deliver in the time box, we need indicators of value and cost for each story. Even if these indicators are imprecise, they help compared to doing the work (features / stories) randomly
- yes, of course, other factors (than just benefit and cost) affect the ordering of the work, such as risks, dependencies, learning, the MVP concept, and other things



Concepts - 6

- planning is about using continual learning, and improving your odds of success, to take quick and effective action. There are no trophies for the perfect plan
- better to light one candle than to curse the darkness
- the whole is greater than the sum of the parts. One example: As we "assemble" the pieces and parts of the plan, we start to see the product and our future in a holistic way, and in multiple dimensions. This is very educational.



Concepts in Action: Basics

General Patton

"A good plan violently executed now is better than a perfect plan next week.” Said in WW2.

Similar: "Fortune favors the bold" (from Roman times).



Stick to the plan?

Building the initial plan and sticking to it, unvarying, seems a good way to failure - or much less success.

Similarly, changing the plan, willy-nilly, at very slight breeze of change, is also foolish.

Balance.



Old Way vs New

Old: We tried hard to keep the plan from changing.

New: We expect the plan to change often, and we make it less effort to change.



Who?

For Agile Release Planning Day, we bring the Team (7?) plus the Business Stakeholders (4?)

Idea: We want everyone to participate (contribute) and everyone to learn.

Idea: Six Blind Men and the Elephant.



Do Plan-0 in One Day

Why?

Timebox, esp given relatively low knowledge at this time.

Must do at right level of granularity (not too high and not too low).

Small epics.

ENABLE frequent revisions.



Concepts in Action: Steps

Start: Vision

A place to start

Written by least informed person.

To enable more learning.

Led by most informed person (PO?)

Everyone PARTICIPATES!

Timebox. (20 mins?)

Get a decent version; can be revised, tweaked later.



Product Backlog

Why?

They need something tangible. Vision was too conceptual for some.

A. Identify Roles.

Quickly

~5-7 roles (personas)

Everyone participates, PO makes final decisions.



User Story Workshop - 1

B. Write Stories (best we can)

Everyone participates, learns

(We discussed that before.)

Sharpie pens, and sticky notes.

Teach user story format quickly.

They need encouragement to write a bunch quickly.

They can easily do 60 in < two 15-minute timeboxes.



User Story Workshop - 2

Why?

6 Blind Men & Elephant

Participation, learning, sharing of knowledge

Buy-in. Motivation.

Everyone sees a bigger picture (at this height off the ground)

We learn also about each other, and who knows what. Useful later.

We identify incorrect ideas.



User Story Workshop - 3

We do it quickly.

We accept that, even with ~10 people, it will **not** be perfect.

We move forward now, with what we have.

It’s ok, even good! We can learn faster this way!



User Story Workshop - 4

Results:

- It's imperfect (so what?)
- "When you come to a fork in the road, take it." Yogi Berra
- Everyone, together see the same "whole" picture
- Everyone sees the same Prod Bklog.

This gives transparency

This enables inspect & adapt

This allows Team to act and learn from action (working product)



Business Value - 1

Like Love.

Everyone talks about it, but no one knows what it really means.

But they do have a feeling ("Feelings, nothing more than feelings…")

One conclusion: It's hard, so we need to learn more about it. Continually.



Business Value - 2

Business Value is important (who knew?)

It is highly variable, and tricky. It can change quickly!

BV affects motivation

80-20 Key Principle

We expect it to change

It doesn’t always turn out the way you expected



Business Value - 3

We used to do the 100%-100% rule (yes, I simplify)

We found it hard, so we tried to ignore it, and let “the steering committee” do that stuff

We pretended that love would always stay the same (I mean, business value).

We pretended they would never say “Now that I see, it’s not what I want” (Hahaha. But you see what I mean…)



Business Value - 4

We postulate: Useful to think of

a. “overall BV” (the main things, simple)

b. BV at the user story level, where we can make decisions

Is this theory proven? It seems to work.



Business Value - 5

Identify Top 3-5 Drivers.

- Like OKRs, KPIs, metrics
- Measurable

Why?

- Clarifying
- Unifying (One Direction!)
- Motivating
- We can learn (soonish) by measuring in 8? mos.



Business Value - 6

BV Points per story

- PO + 4 BSHs
- Wideband Delphi Expert Estimation

Why?

Lots of reasons…



Business Value - 7

Why?

- Not perfect (so what?)
- Fast
- Enables knowledge sharing
- Enables learning
- Gives Transparency (enables more learning)
- Vote & learn later with feedback
- Vote & learn later when release
- Enables better 80-20 execution



ROI Index

Use ratio of BVP and SP for each story.

Sort PB by this ROI.

Already MUCH better, even though we are new at this (we'll become better).



Other Factors

Consider: Risks, Dependencies, LEARNING, MMFS/MVP, and other factors.

Anyone can propose. Anyone can disagree, and debate. PO is tie-breaker.

Definitely there are some dependencies. BUT: we used to order by dependencies too much.



Drawing the Lines

In the PBL to indicate releases (and dates).

Anyone can propose. Anyone can disagree, and debate. PO is tie-breaker.

Commonly: Something smaller, earlier is better.

Why?

Probably a line for a 2nd release



1st Guess of “the Date”

Usually the date of the first release is most meaningful.

Using guesses (eg, expected Velocity, Contingency, Landing Strip) we can take what we have, lay it out and make a first guess of the date.

Then, we “prioritize our stupidity” (use if it makes people smile), learn more, and improve the guesses, and “the guess”.



Figuring Out the Date

1. Velocity vs a SP total.

Ex: Vel=20 SP, we need to do 60 SPs; that will take 3 Sprints

2. Contingency

Based on prior experience some; best guess.

3. Landing Strip

All the “final work” after “building it”



Landing Strip

1. Final Testing

Int/Reg Testing
UAT
Security Testing
Load Testing
Perf Testing
UX Testing
Exploratory Testing

2. “Training” (or videos on Youtube?)

Well, it’s supposed to be TOTALLY user-friendly, but…
a. What is it?
b. Tips and tricks on how to use it

3. Final stuff

Approvals (take forever???)
Surprise!

Often a minimum of 2 Sprints, because…



At the end (of Day 0)

What do we have?

- First draft plan (that can be revised fairly easily)
- We all know what we all know
- Shared a lot of knowledge
- Team building
- A way to prioritize our stupidity (to start learning more)
- Some buy-in
    - No mushroom treatment
    - Everyone participated
    - The building of the plan was transparent
    - If you had questions about anything about this plan, you did ask (or could have asked) at any time
    - You understand MUCH better “why” (or where the value is, etc)
- Hopefully the Team is starting to WANT to do this work
- Is it Impossible-Impossible, or merely impossible? Decide! Often a manager can see better, and will help.

