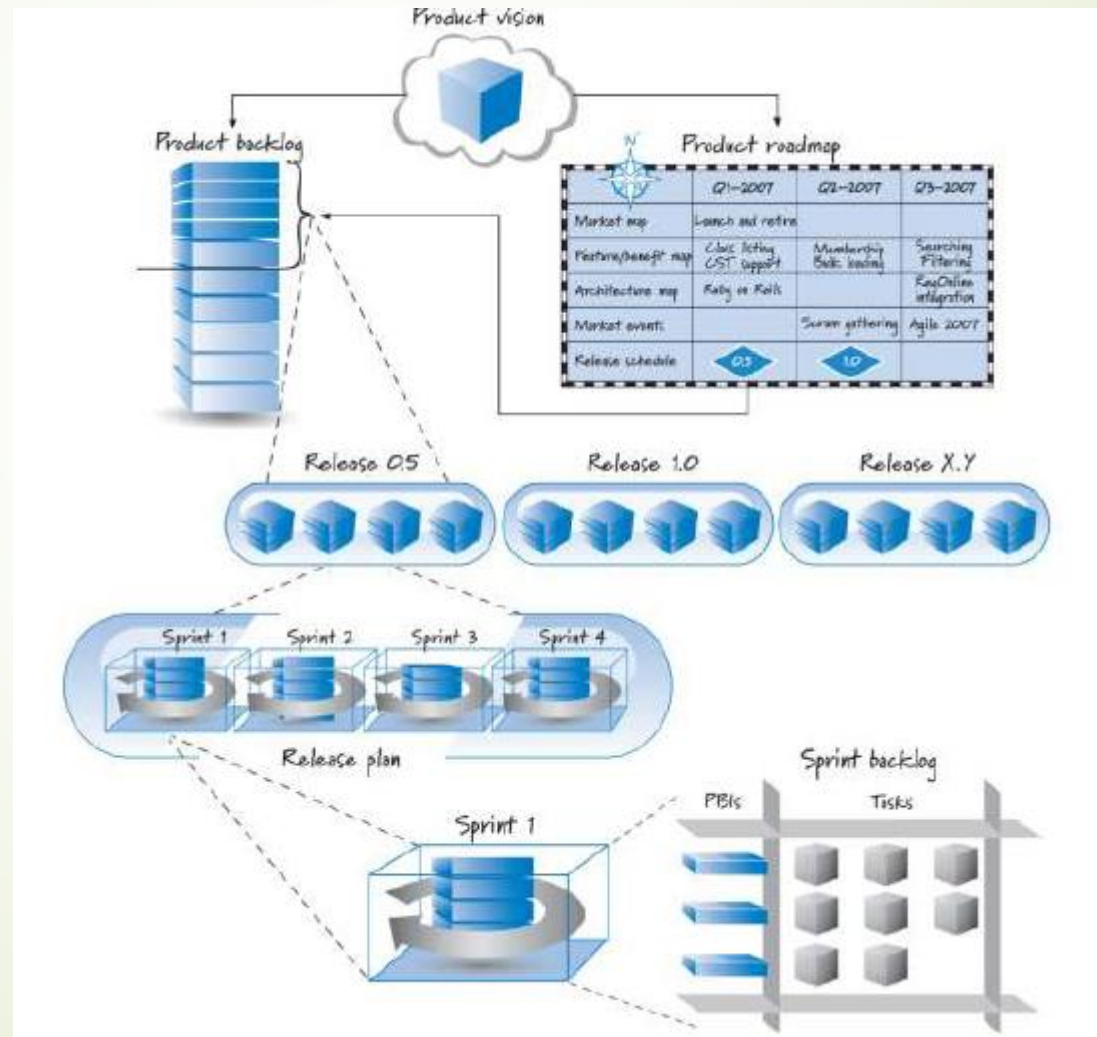# High-Level Planning

Lecturer: Adel Vahdati

Planning Hierarchy

Product Planning

- **Activities:**
  - Create Vision
  - Create Product Backlog
  - Create Roadmap
  - Acquire Other Knowledge.
- **Outputs:**
  - Product Vision
  - Product Roadmap
  - High-Level Product Backlog.

Product Planning: Product Vision

- The product vision provides a clear description of the areas in which the stakeholders, e.g. users and customers, get value from the product.

- Visions, even of complex products, should be simple and should provide a coherent direction to those involved in the project.

- Popular formats:
  - Elevator statement
  - Product datasheet
  - Product vision box
  - User conference slides
  - Press release
  - Magazine review

Popular Vision Formats

- Creating Innovative Products, include:

  - **Elevator statement**: 30-second to 1-minute quick pitch of the product vision.

  - **Product datasheet**: A 1-page marketing piece.

  - **Product vision box**: Illustrate the box the product might ship in, including 3-4 points to emphasize on the label.

  - **User conference slides**: 2-3 presentation slides that introduce the product at a user conference. Avoid bullet points.

  - **Press release**: Write the ideal 1-page press release describing what is newsworthy about the new product when it becomes available.

  - **Magazine review**: Draft a fictitious magazine review bylined by the solution reviewer in your industry's most popular trade magazine.

Vision Statement

- **Apple:** "To bring the best user experience to customers through innovative hardware, software and services."

- **Amazon:** "To be Earth's most customer-centric company, Earth's best employer and Earth's safest place to work."

- **Fujifilm:** "To build an environment for the creation and effective utilization of knowledge."

- **BBC:** "To act in the public interest, serving all audiences through the provision of impartial, high-quality and distinctive output and services which inform, educate and entertain."

- **Google:** "To organize the world's information and make it universally accessible and useful."

Product Vision

- Some organizations and teams continue to fall into the trap of predominantly focusing on product features when creating a vision for a product.

- This pitfall pulls a Scrum Team away from considering the primary importance to customers of how a product can improve their lives or solve their problems (benefits)

Product Vision: Elevator Statement

For	<target customer>
who	<needs something>
the product	<product name>
is	<product category>
which	<key benefit, reason to buy>
comparing to	<competition>
our product	<is better by what>

Product Vision: Elevator Statement

VISION

What is your purpose for creating the product?

Which positive change should it bring about?

TARGET GROUP

Which market or market segment does the product address?

Who are the target customers and users?

NEEDS

What problem does the product solve?

Which benefit does it provide?

PRODUCT

What product is it?

What makes it stand out?

Is it feasible to develop the product?

BUSINESS GOALS

How is the product going to benefit the company?

What are the business goals?

PRODUCT VISION BOARD

Product Vision: Product Box

- Involve stakeholders (Users and customers would be great!)

- Ensure materials are available such as paper, boxes, glue, markers

- Explain the activity and present some example product boxes

- Split the group into small teams

- Ask participants to create a compelling and innovative product box design that would entice customers to buy their product. This can include messaging such as:

  - Name of your (future) product

  - Catchy slogan or motto

  - Three to four key selling points with an image or drawing

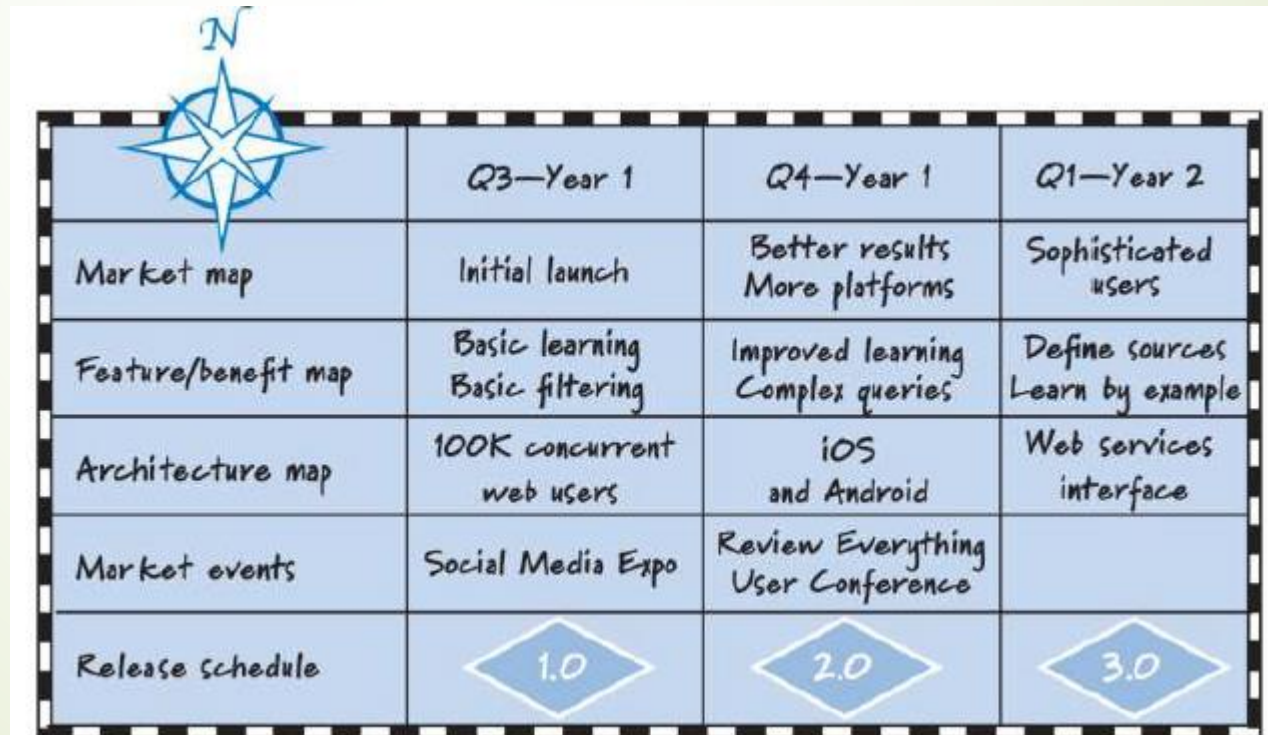 - A bit more detailed information on the back of the box such as compelling features

Product Vision: Product Box

- Ask each team to sell their product to the other participants in the group using their product box

- Write down any insights during the selling process on a sticky note

- Once every team has presented and 'sold' their product box, the group comes together and discusses the insight gained from the activity

- Collaboratively craft a vision for the product from the insights and discussions

Product Planning: Product Roadmap

- Produced after the initial vision and the high-level product backlog.

- Consists of a series of releases for achieving some or all of the product vision.

N	Q3—Year 1	Q4—Year 1	Q1—Year 2
Market map	Initial launch	Better results More platforms	Sophisticated users
Feature/benefit map	Basic learning Basic filtering	Improved learning Complex queries	Define sources Learn by example
Architecture map	100K concurrent web users	iOS and Android	Web services interface
Market events	Social Media Expo	Review Everything User Conference	
Release schedule	1.0	2.0	3.0

Product Roadmap

- The concept of a product roadmap however, is that it is a high-level, strategic plan, that describes the likely development of the product over the next period of time.

- The roadmap should support the products' purpose and vision and it helps the Product Owners to keep their stakeholders aligned.

- The roadmap also makes it easier to coordinate the development of different products and it fosters transparency in order to manage customer expectations.

Goal Oriented (GO) Product Roadmap

DATE The date or time frame when a goal should be met.				
NAME The name of the new release.				
GOAL The outcome or benefit you want to achieve.				
FEATURES The high-level features required to meet the goal.				
METRICS The measures to determine if the goal has been met.				

Now-Next-Later Product Roadmap

NOW — What are initiatives that we should tackle in the upcoming quarter or program increment?

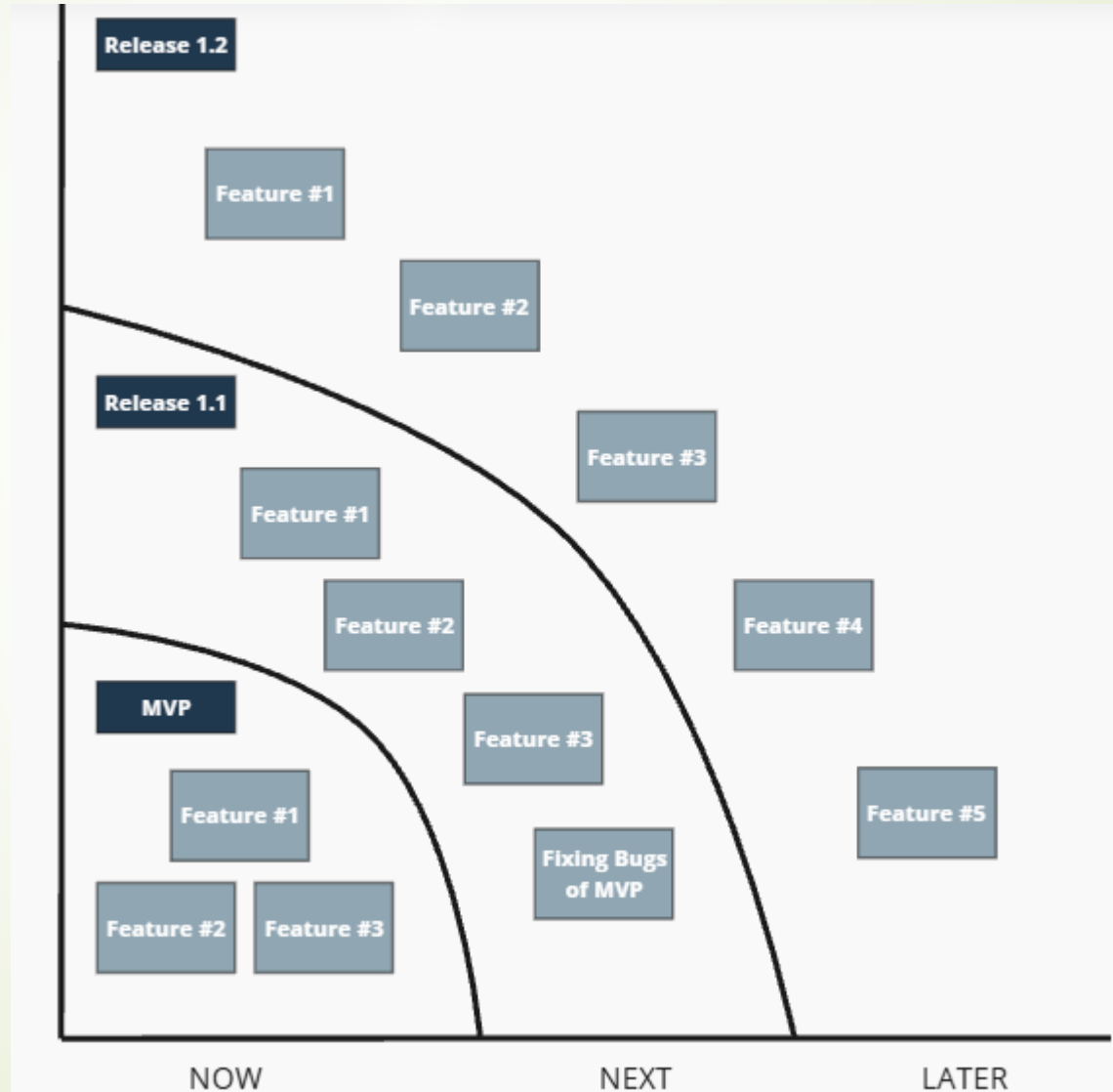**NEXT** — What are the initiatives that we should work on soon?

LATER — What are initiatives that should be considered, but for an even later timeframe?

Now-Next-Later Product Roadmap

Release Planning

- **Activities:**
  - Reviewing Release Constraints (scope, date, and budget),
  - Reviewing Minimum Releasable Features (MRFs of the release)
  - Product Backlog Grooming
  - Sprint Mapping (indicating in which sprint some or many of the product backlog items might be created).

- **Output:**
  - Release Plan showing
    - when we will finish,
    - what features we will get,
    - what the cost will be, what the desired MRFs are for the release,
    - how some of the product backlog items map to sprints within the release.

Minimum Releasable Features (MRFs)

- The **minimum releasable features** represent the smallest set of "must-have" features

- The ones that simply have to be in the release if we are to meet customer value and quality expectations.

- An important part of release planning is to diligently reevaluate and refine what are truly the MRFs for the release.

- Some people refer to this set of features as the **minimum viable product** (**MVP**) or **minimum marketable features** (**MMFs**).

Fixed-Date Release Planning

| Step	Description	Comments
1	Determine how many sprints are in this release.	If all sprint lengths are equal, this is simple calendar math because you know when the first sprint will start and you know the delivery date.
2	Groom the product backlog to a sufficient depth by creating, estimating the size of, and prioritizing product backlog items.	Because we are trying to determine which PBIs we can get by a fixed date, we need enough of them to plan out to that date.
3	Measure or estimate the team's velocity as a range.	Determine an average faster and an average slower velocity for the team
4	Multiply the slower velocity by the number of sprints. Count down that number of points into the product backlog and draw a line.	This is the "will-have" line.
5	Multiply the faster velocity by the number of sprints. Count down that number of points into the product backlog and draw a second line.	This is the "might-have" line.

Fixed-Date Burnup Chart
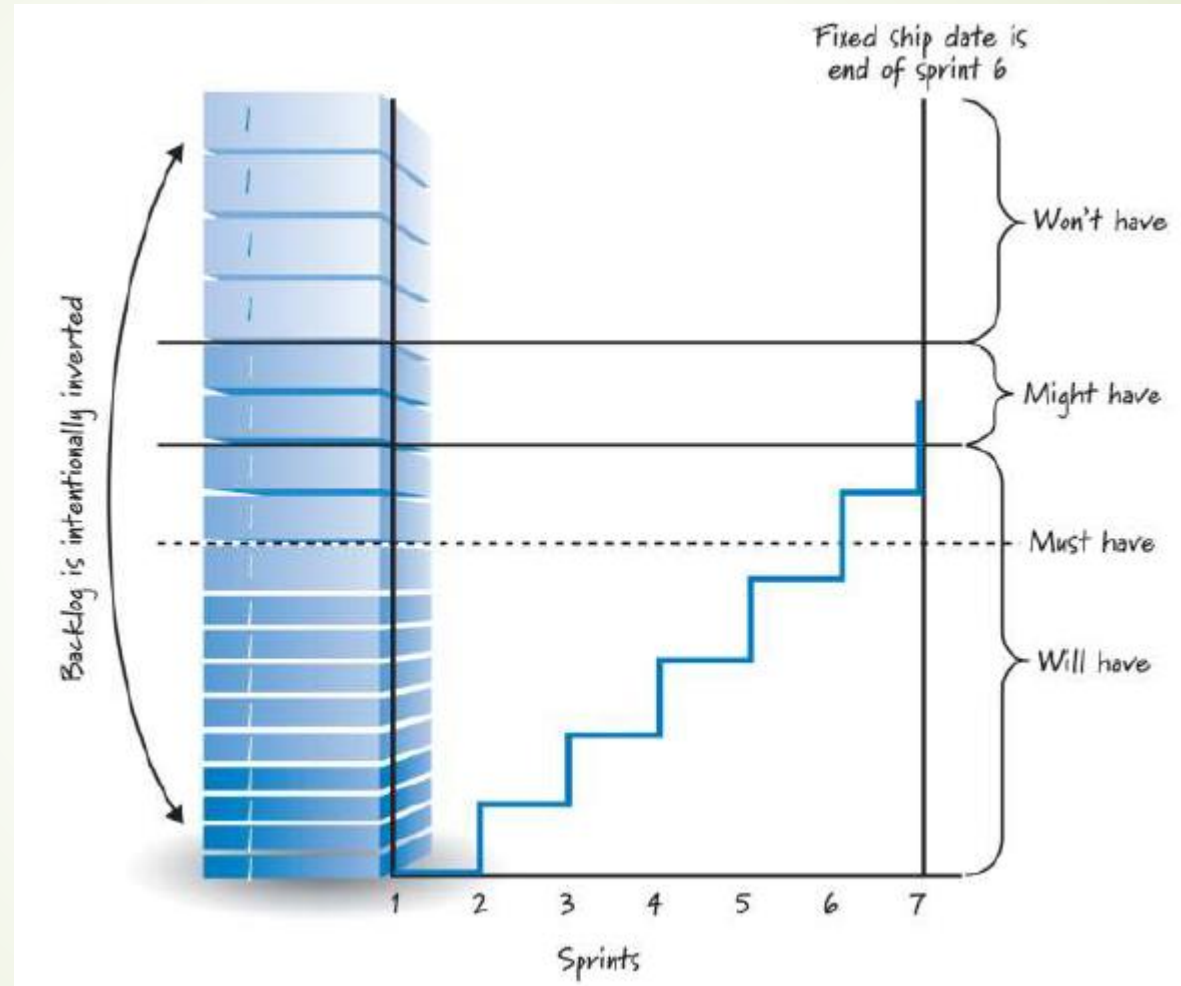
Fixed-Scope Release Planning

Step	Description	Comments
1	Groom the product backlog to include at least the PBIs we would like in this release by creating, estimating the size of, and prioritizing PBIs.	Because this is a fixed-scope release, we need to know which PBIs are in the fixed scope.
2	Determine the total size of the PBIs to be delivered in the release.	If we have a product backlog of estimated items, we simply sum the size estimates of all of the items we want in the release.
3	Measure or estimate the team's velocity as a range.	Determine an average faster and an average slower velocity for the team.
4	Divide the total size of the PBIs by the faster velocity and round up the answer to the next integer.	This will tell us the lowest number of sprints required to deliver the features.
5	Divide the total size of the PBIs by the slower velocity and round up the answer to the next integer.	This will tell us the highest number of sprints required to deliver the features.

Fixed-Scope Burndown Chart
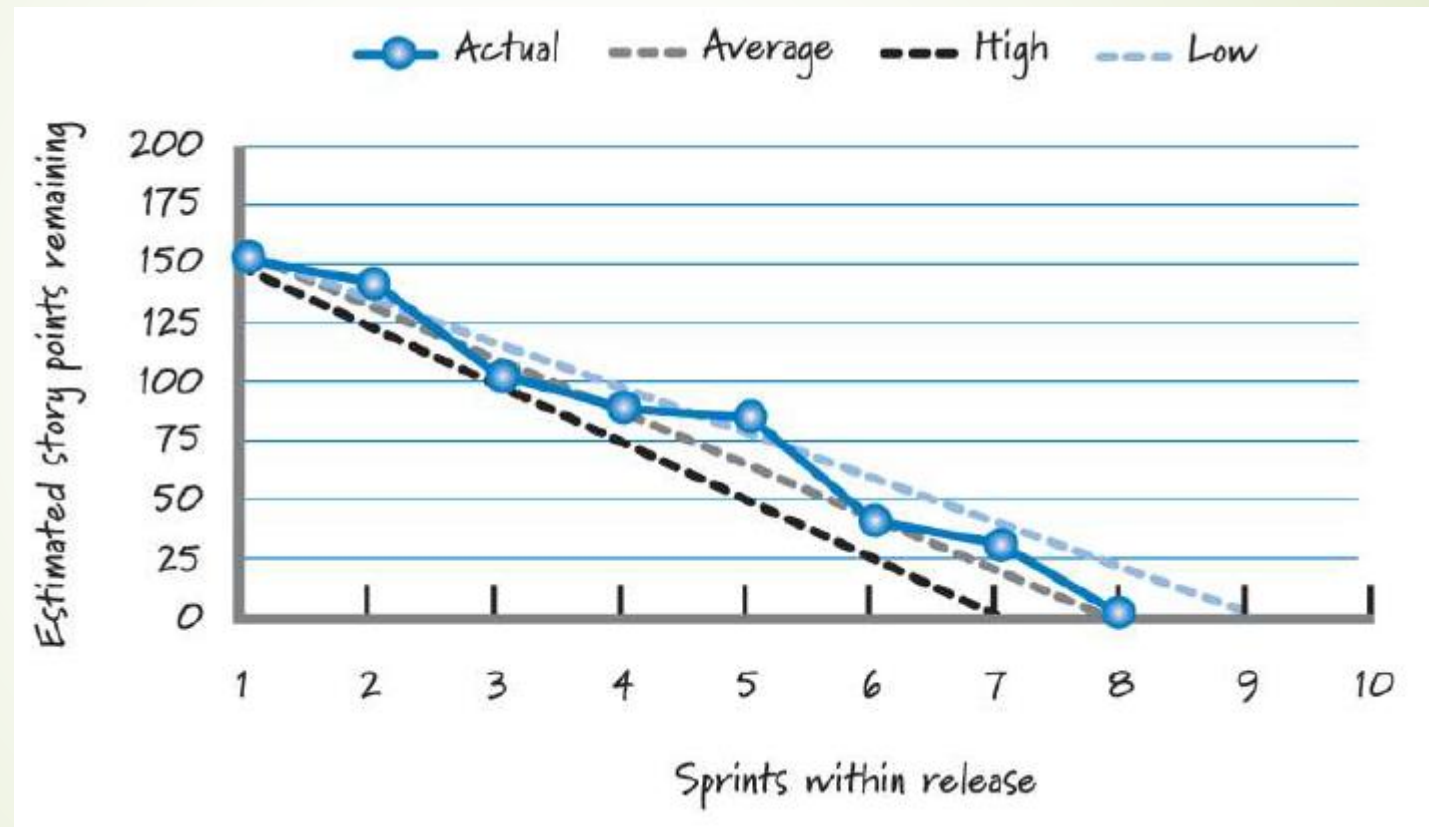
Fixed-Scope Burnup Chart
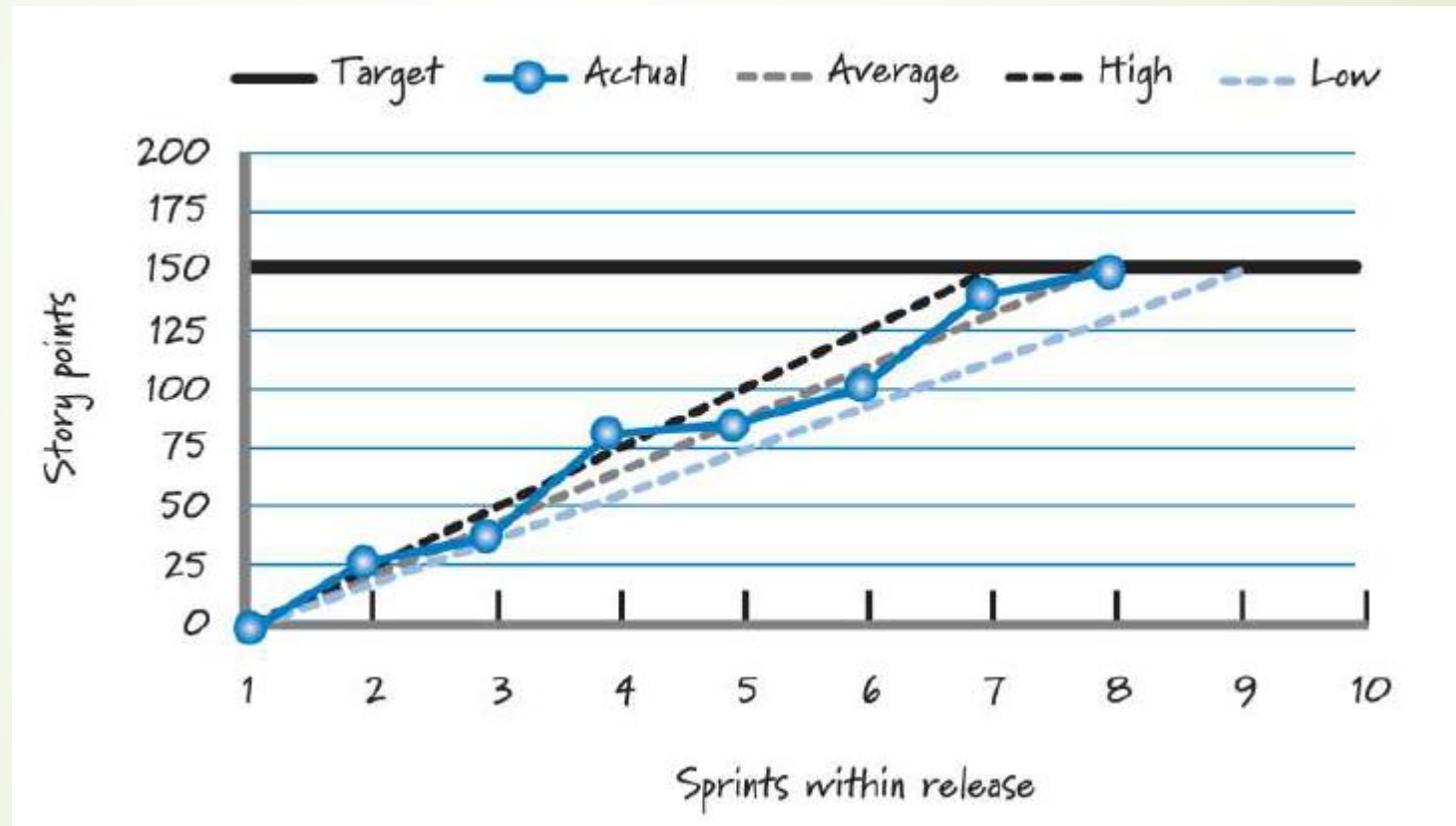
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