Playbook Methods Repository

# **Release Planning**

Determine the target outcome(s) of one or more major releases and establish a plan that identifies release or product goals, target features or functionality, critical dependencies, key schedule and budget constraints, and how progress will be measured.

### Remote Agility: **•** High

### Linked Tactic(s): Delivery Program Planning, Agile Development, Go-to-Market Planning, Release Management, Product Roadmapping

Why we do it:

* Release Planning is a valuable agile product development technique to identify, plan and communicate the desired outcome(s) of major product releases and help manage the various inputs required to achieve them.
* By bridging the gap between a product’s strategy (expressing overarching business/user goals) and a product’s backlog or sprint plan (expressing tactical benefits/needs), release plans help ensure a product’s value is realized incrementally and intentionally through measurable, goal-driven releases, often captured on a product roadmap.
* Release plans empower the business to make informed investment decisions, they socialize expectations and needs across stakeholders and team members, and they guide development progress across a product’s lifecycle.

When to apply it:

* **Product Roadmapping/Delivery Program Planning:** During product roadmapping when synthesizing definition work or during engagement build up when planning delivery work, build an initial release plan that reflects validated and prioritized product goals, features, dependencies, and constraints for an MVP build and release phase. This may reflect the preliminary target outcome(s) for an internal, beta and/or first major-version public release.
* **Agile Development:** During agile development when iterating through the product backlog, update and refine the release plan to reflect the evolving prioritization of product goals, features, dependencies, and constraints, in response to insights gathered through qualitative and quantitative in-market feedback.

Best Practices & Considerations:

* **Leverage a User Story Map:** A user story map aligns the goal-driven activities of a product’s user with the sequential tasks and sub-tasks undertaken to complete them. Story maps help visualize, define and prioritize holistic product releases which are then captured in a release plan. They encourage releases to be defined as minimal viable product increments, providing realizable value to the user or business, and they help facilitate the translation of tasks (captured as user stories) into the product backlog.
* **Use an Outcome-Based Product Roadmap:** Release plans are best captured on an outcome or goal-based roadmap - a flexible, time series artifact for dynamically planning and communicating the target outcomes and required inputs of each major product release. Each release depicted on a roadmap should include:
  + **Date:** A specific date (or date range) when the release goal is expected to be achieved.
  + **Name:** A title that references the release name or software version number.
  + **Release Goal:** A description of the target outcome(s) or product benefits conveyed by the release. Release goals should ladder up to the product’s strategic business objectives and/or user value proposition.
  + **Features/Functionality:** A high-level description of the features/functionality entailed in the release. This is supported by links to associated epics, labels, or components in the product backlog, to identify input dependencies/constraints which must be met in order to achieve the release goal.
  + **Metrics:** The specific metrics which will be measured to assess whether the release goal has been achieved.
* **Update the Release Plan Dynamically:** The release plan is a living artifact that should be updated and refined throughout the product development lifecycle, in response to new learnings and priorities. The release plan should be revised on a regular cadence to capture the evolving prioritization of product goals, features, dependencies, and constraints.

## Responsible roles:

### Product Manager:

### Depending on team composition, the Product Manager is usually responsible for building the initial release plan as well as updating and refining it through the course of agile development.

### Release plans should be shared with lead team members from Engineering, Design, and QA as well as key stakeholders across the business.

### Cross-functional input to the release plan should be encouraged to ensure it represents a comprehensive and aligned view of target outcomes for the product’s major releases.

## Tools:

### Online tools/platforms/services

### Atlassian [Confluence](https://www.atlassian.com/software/confluence) + [Jira](https://www.atlassian.com/software/jira)

### [Asana](https://asana.com/)

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## Thoughtworks Examples - Linked

### Client working docs, airtable, miro/mural boards

### [Jetson Saffron User Story Map](https://miro.com/app/board/o9J_lpA2di4=/?invite_link_id=830591419345)

### [Jetson Saffron Release Plan as Roadmap](https://miro.com/app/board/o9J_lnz7WQk=/?invite_link_id=262948513113)

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## Learn more: How we do this?

### Outside References (articles, books, etc.)

### [Atlassian Guides - A PM Guide to Release Planning](https://www.atlassian.com/blog/agile/product-managers-guide-release-planning)

### Sub-set Activities

### [User Story Map](https://drive.google.com/file/d/0BzMMSeg0p_XcQXhyRmJCYjl0dGM/view?usp=sharing&resourcekey=0-86RmClH1PKCntkDGBgCbGg)

### [Outcome-Based Roadmap](https://docs.google.com/document/d/1ZPi8b2K_BqyeHW51qYSC6lLBZVJEcZYI49_tRj1xyq0/edit?usp=sharing)

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