

Continuous Planning

Incremental and iterative planning with Continuous Planning.

By Bart de Best

Context:

At a Small and Medium Enterprise (SME) organization, there was a need to better plan the new functionality and to be able to manage more closely on the timely delivery of requirements and wishes of end customers. The planning of the work of the DevOps teams, which was outsourced, was completely lacking. The assignments were given via collaboration tools and realized immediately without a design or a product backlog tool such as Jira.

This blog is in line with the blog 'Incremental and iterative design with Continuous Design' but is written in such a way that the blogs can be read independently.

Challenge:

The challenge with this organization was that the business had no strategic management but acted completely event-driven on customer needs. This also created a lot of pressure from the business on the DevOps teams to implement changes immediately through customized solutions. The DevOps teams had become accustomed to this, but the result was that important management activities such as upgrades to the programming framework and patch management were not carried out. In addition, all departments could submit change requests without agreements about mutual dependencies and prioritization.

Solution:

The solution to this challenge is found in the concept of Continuous Planning. This blog discusses this approach through the following steps:

1. Determine the mission, vision, business purpose and strategy
2. Determine what information provision is required to implement the strategy
3. Determine the vision statement for the application(s).
4. Determine the roadmap
5. Determine the releases
6. Determine the product backlog

[Figure 1](#) provides an overview of these steps.

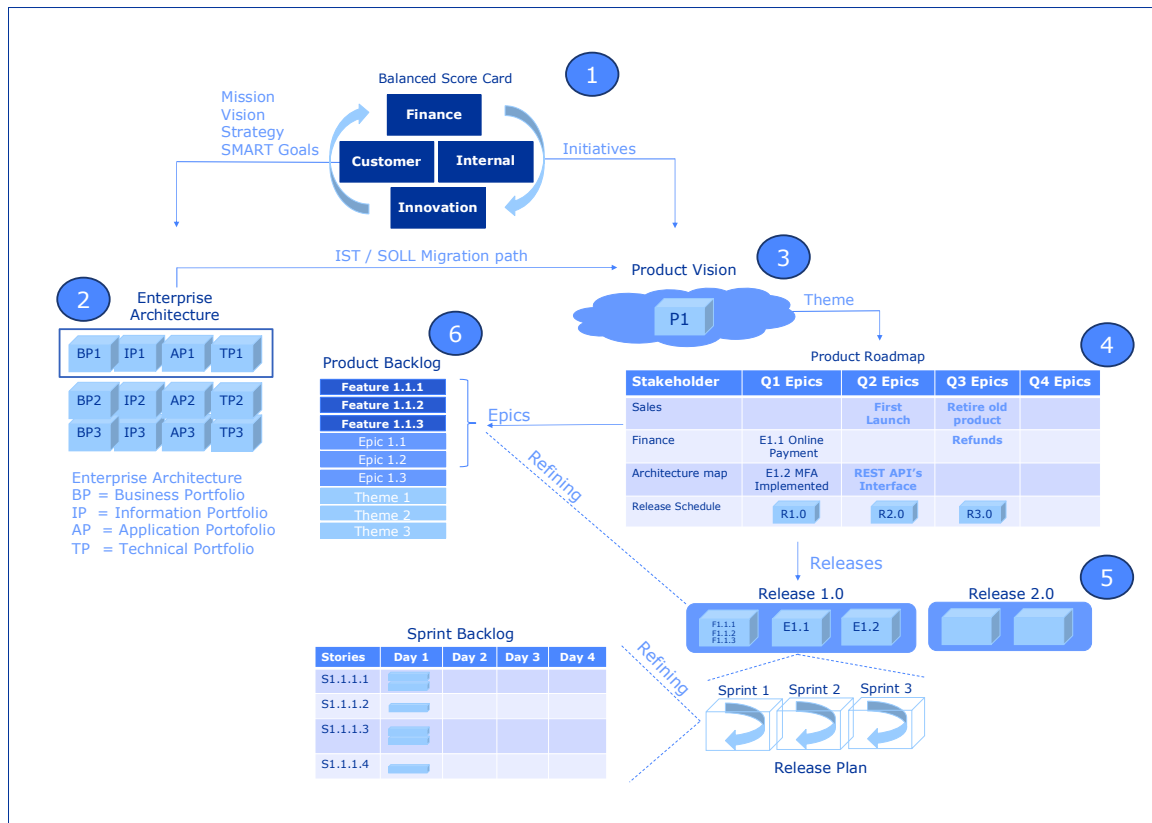


Figure 1, The Continuous Planning model.

1. Determine the mission, vision, business goal and strategy

The mission of the organization is quickly established by asking stakeholders why the company was founded. The vision proved to be more difficult to determine, but with some further questions the stakeholders indicated how they see the market developing in the near future and how they wish to act on it.

However, a business goal and strategy are not quickly established. To this end, a SWOT and business model canvas approach was used. After two workshops and much discussion, the company goal and strategy for the coming year have been approved in draft.

On this basis, the balanced scorecard has been drawn up as shown in Figure 2. All four perspectives are provided with an objective and Critical Success Factors (CSFs) and Key Performance Indicators (KPIs). These are defined on the basis of the recognized value streams that together form the value chain of the organization. The goals can only be achieved if the bottlenecks in these value streams are removed. (See the 'Incremental and iterative design with Continuous Design').

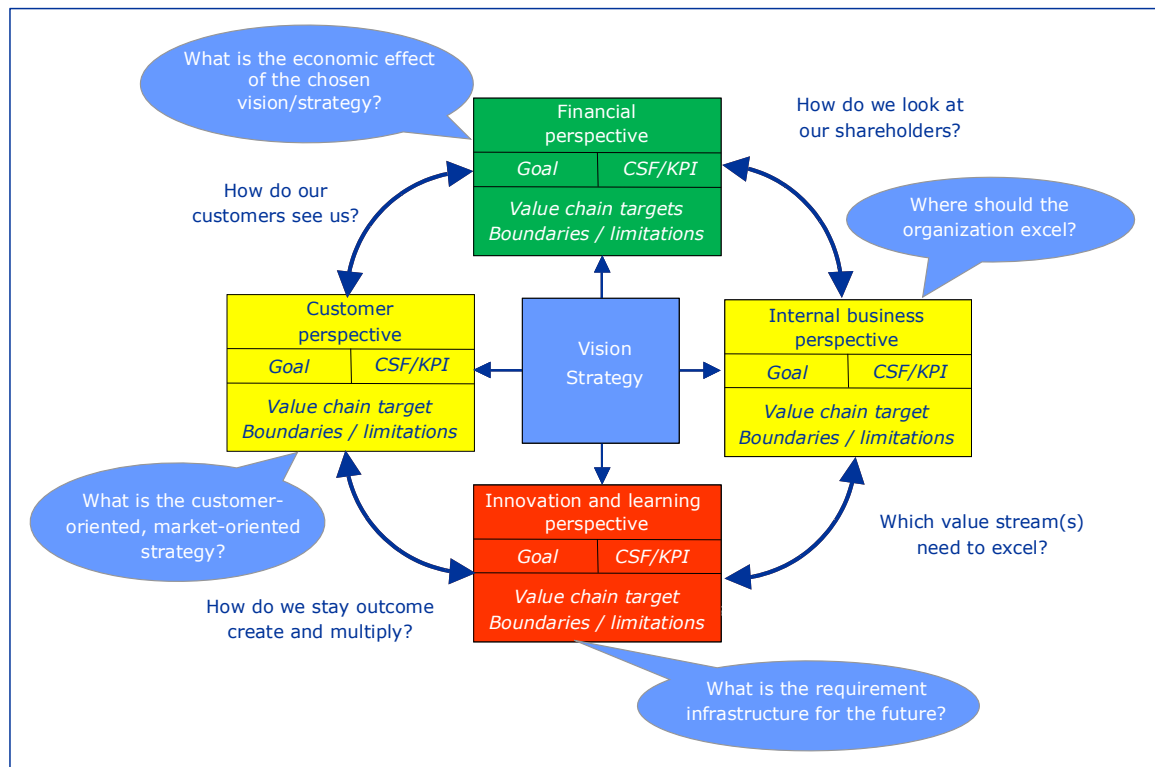


Figure 2, The balanced scorecard.

2. Determine what information provision is required to implement the strategy

An enterprise architect has been appointed in the organization to determine the changes in the information provision. Figure 3 shows the field of work of the enterprise architect. This visualizes that the enterprise architect provides substance to all four points of view, namely the business, information, application and infrastructure architecture. The enterprise architect looked at which stakeholders should be involved (Who?), what the objects are that are relevant to value creation (What?) and how the value can be created (How?).

The enterprise architect has determined which changes are required in the information systems to implement the strategy based on the enterprise architecture framework. For this purpose, the enterprise architect has drawn up the architecture models and architecture principles of the current situation (IST) and the desired situation (SOLL) for all four factors of PPPT (People, Processes, Partners as Technology). The most important thing is the migration path from IST to SOLL because this is the path that must be taken to implement the strategy and thus achieve the business goal.

The migration path is the basis for the product backlog and provides it with themes with a planning horizon of one year.

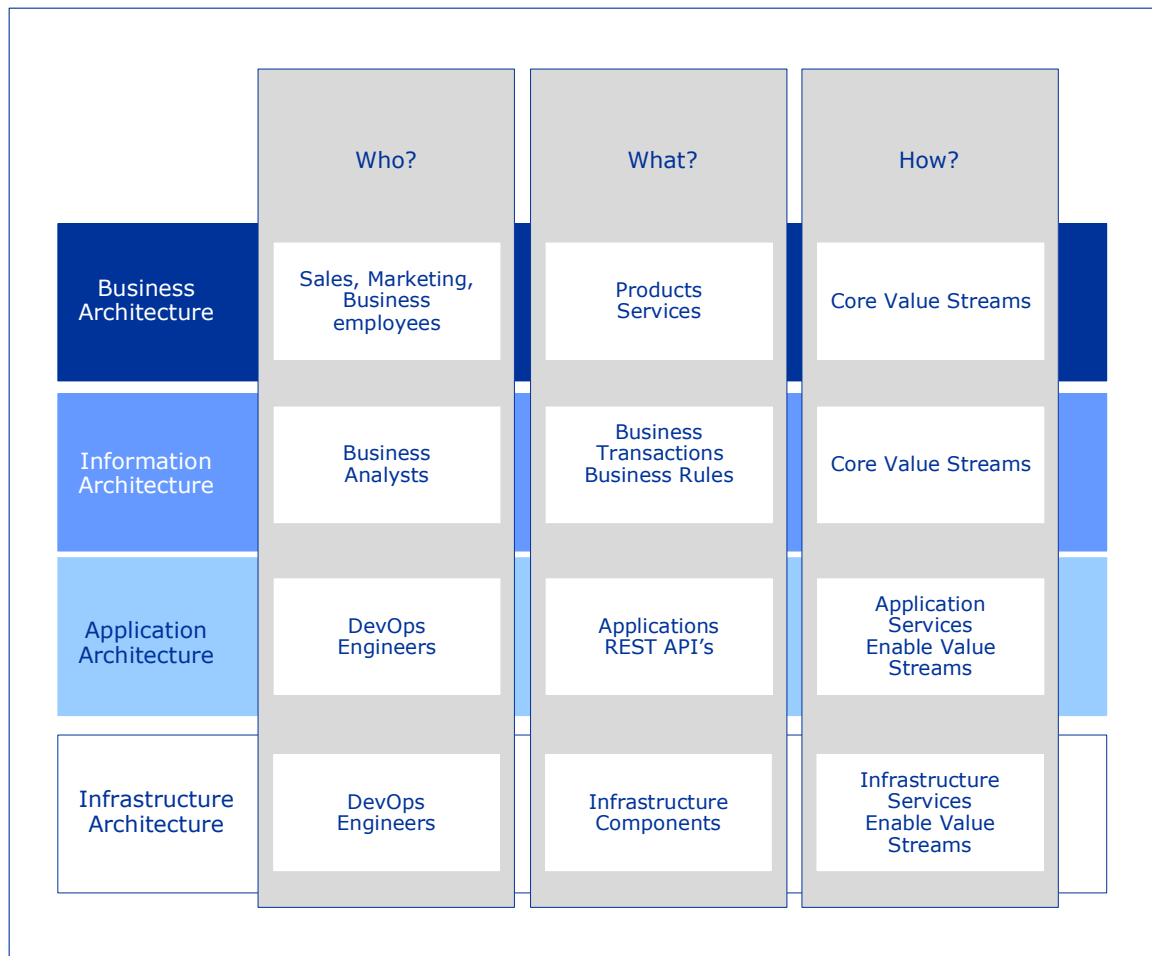


Figure 3, Enterprise Architecture viewpoints.

3. Determine the vision statement for the application(s).

Figure 4 shows how the product vision emerged from the migration path of architecture from which themes arise. The appointed product owner has drawn up this product vision together with the enterprise architect. The product vision is defined based on the following aspects:

- Target audience
- Needs of the target group
- Type of product or services
- Unique selling point

The product owner then drew up the business case for the Agile project together with the selected stakeholders. This business case fleshes out the defined themes and complies with the product vision. The business case also includes the details of the risks and countermeasures.

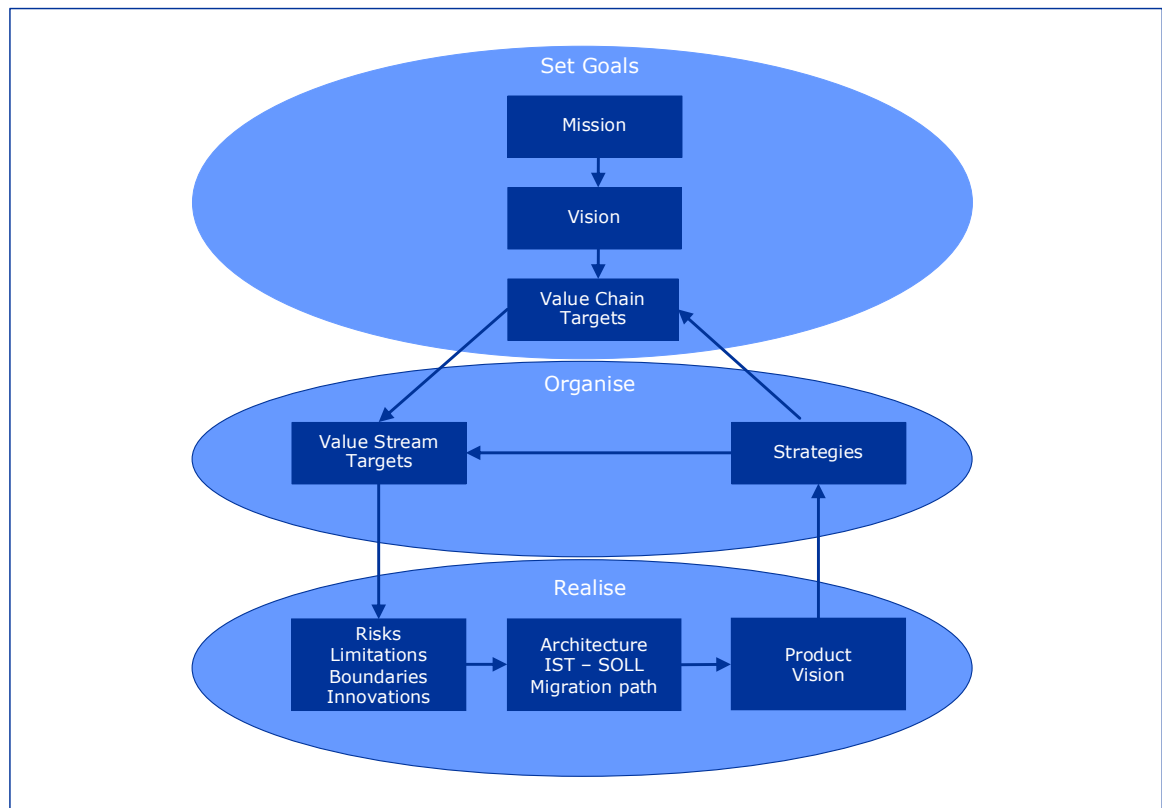


Figure 4, Continuous Planning operating model.

4. Determine the roadmap

The product vision is the basis of the product backlog on which the themes are located. These are translated quarterly into epics that will be realized in the coming quarter. Each stakeholder owns 1 or more epics. An epic is defined based on an epic one pager that defines the functionality, objective and risks with countermeasures.

Stakeholders	Q1 Epics	Q2 Epics	Q3 Epics	Q4 Epics
Release Schedule	R1.0	R2.0	R3.0	

Figure 5, Roadmap.

5. Determine the releases

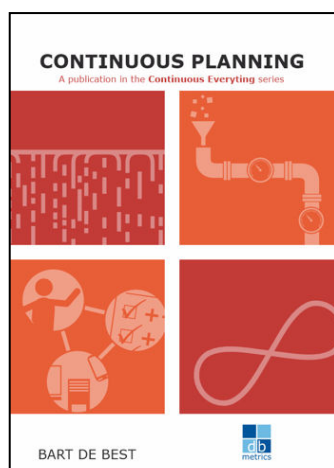
In most cases, an epic is also defined in the form of a Minimal Viable Product (MVP) that can be released. But that didn't have to be the case. Often the epic has been released, but not all the features defined within it were completed. In that case, the epic has been closed and, if desired, a new epic has been drawn up.

6. Determine the product backlog

Based on the epics, features and stories have been identified that, together with the themes, form the product backlog. In addition to this top-down filling of the product backlog, features and stories based on daily needs have also been added to the product backlog and given a priority.

This implementation of the planning has a continuous character because it is organized top-down and is continuously refined as the realization of the strategy progresses. 10% of the production capacity has been reserved for refinement.

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<https://www.dbmetrics.nl/ce-en/continuous-planning-en/>