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PORTOROŽ

Empowering Portfolio Management with Azure DevOps: A Journey to Enterprise Agility

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Microsoft MVPs for Developer Technologies



Agenda

Challenges

Basic Infrastructure for Portfolio Management

Azure DevOps - Agile Boards

Rolling Planning

Visualize Portfolio Backlog using Delivery Plans



Challenges

Portfolio Product Management Challenges

Management

Many initiatives, projects, and products

Alignment

Syncing initiatives; handling dependencies

Organization

Multiple teams; department to enterprise

Resources

Balancing load in view of constrained resources

Structures

Different organizational levels and units

Maximizing delivered value

Conflicts in Portfolio Product Management

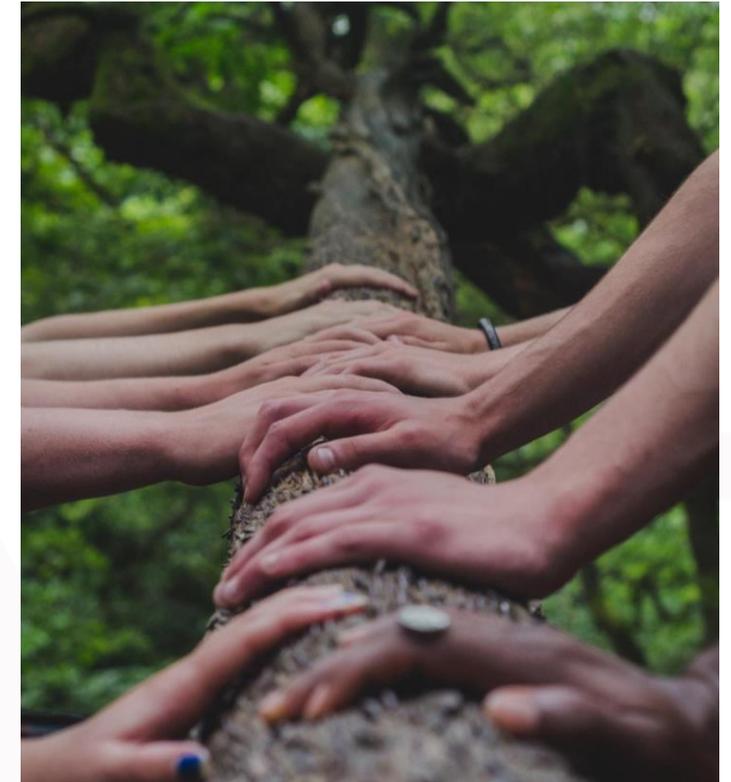
Identifying Diverse Needs and Priorities

Making Conflicts Visible and Clear

Clarifying and Defining Priorities

Resolving Conflicts at the Appropriate Level

Leveraging the Right Tools



Maximizing delivered value

Navigating Complexity of Portfolio Management

Managing at different levels: Enterprise to Team

Different Processes

Different People Involved

Information Flow

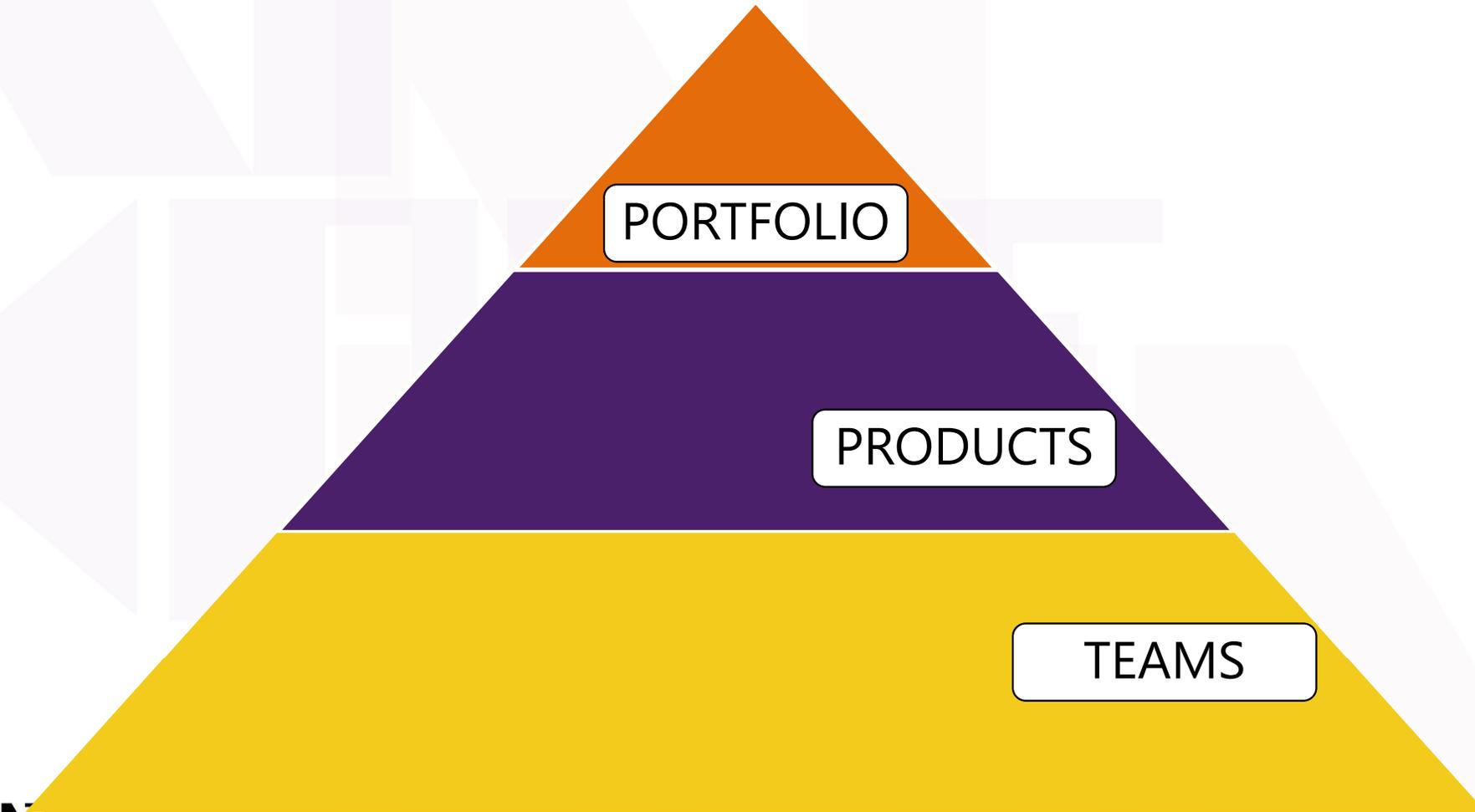
Strategy Decision Flow: Top-Down

Implementation and Status Reporting: Bottom-Up

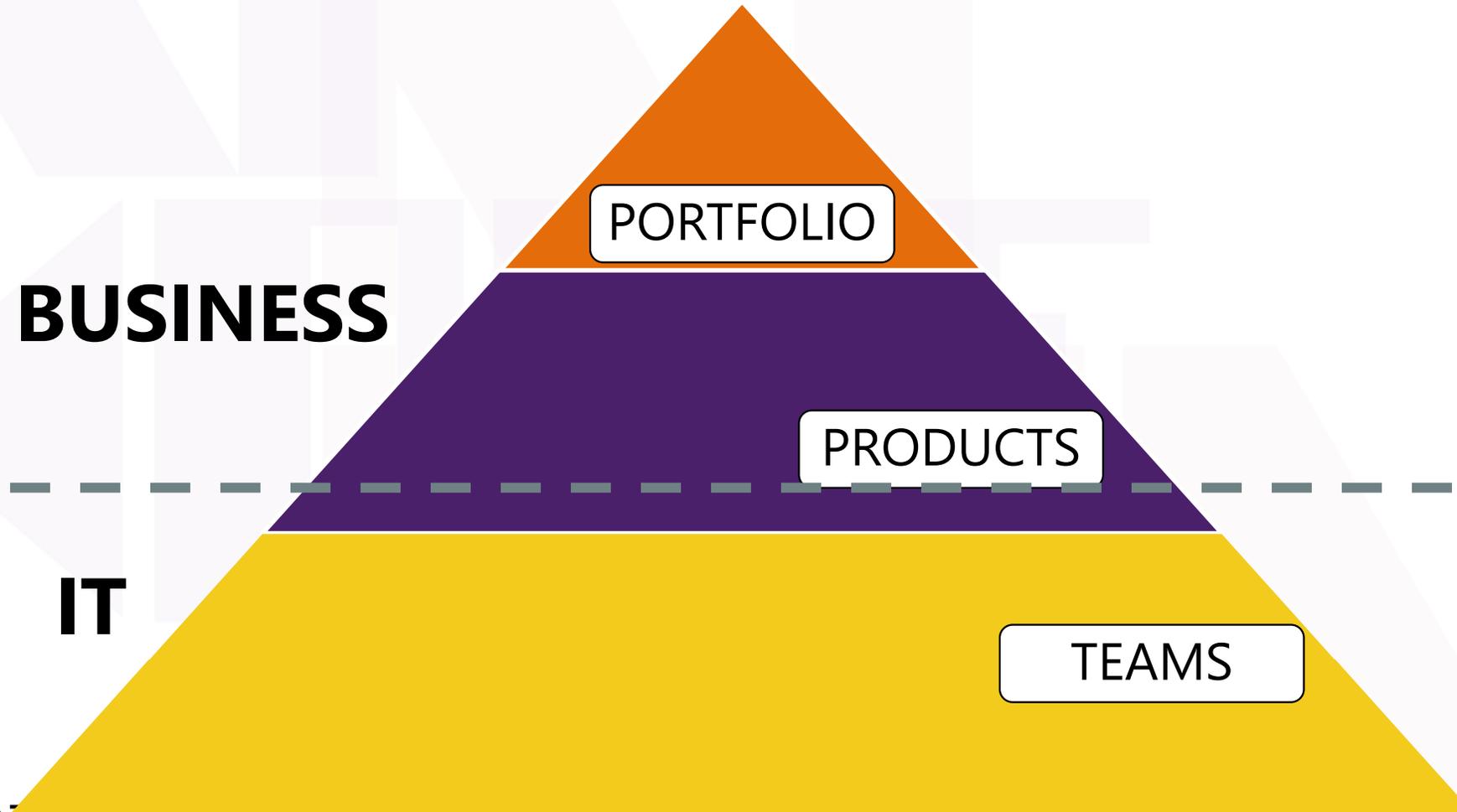
Maximizing delivered value



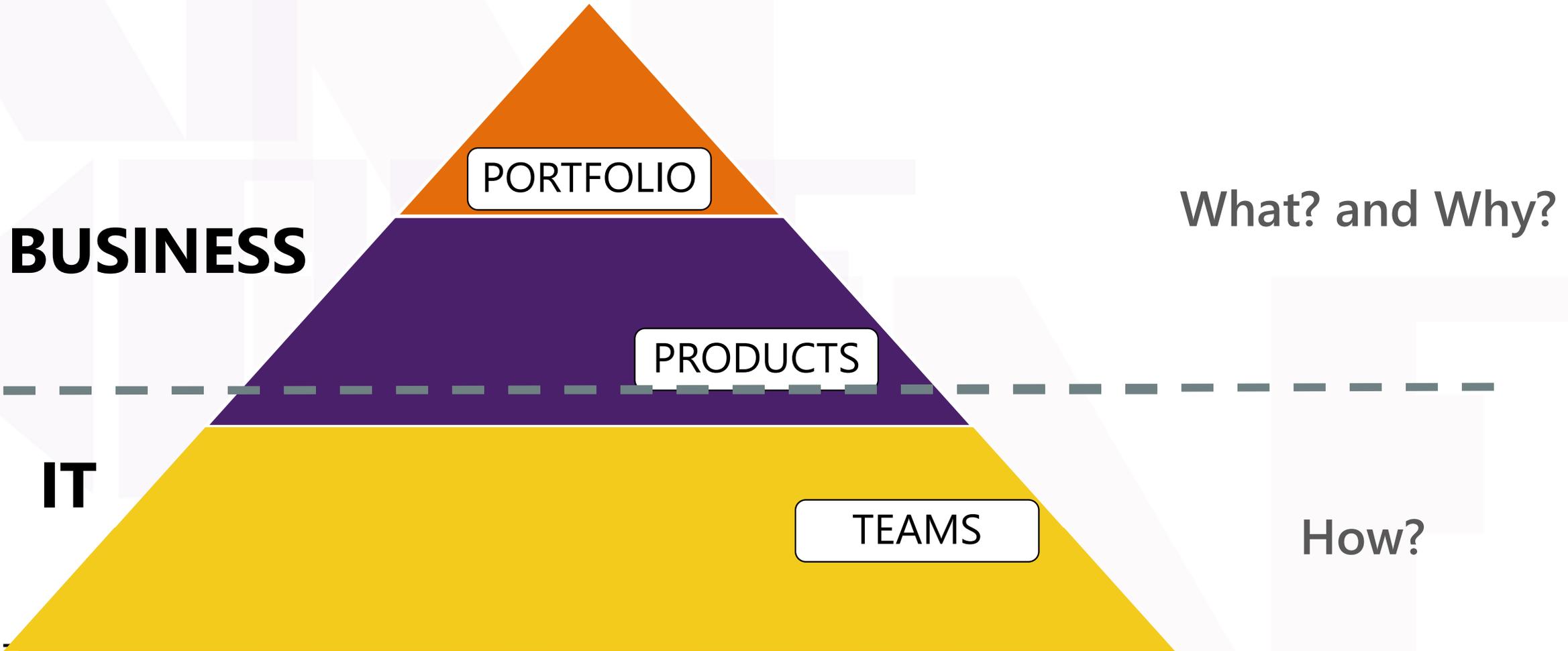
Different Processes At Different Levels



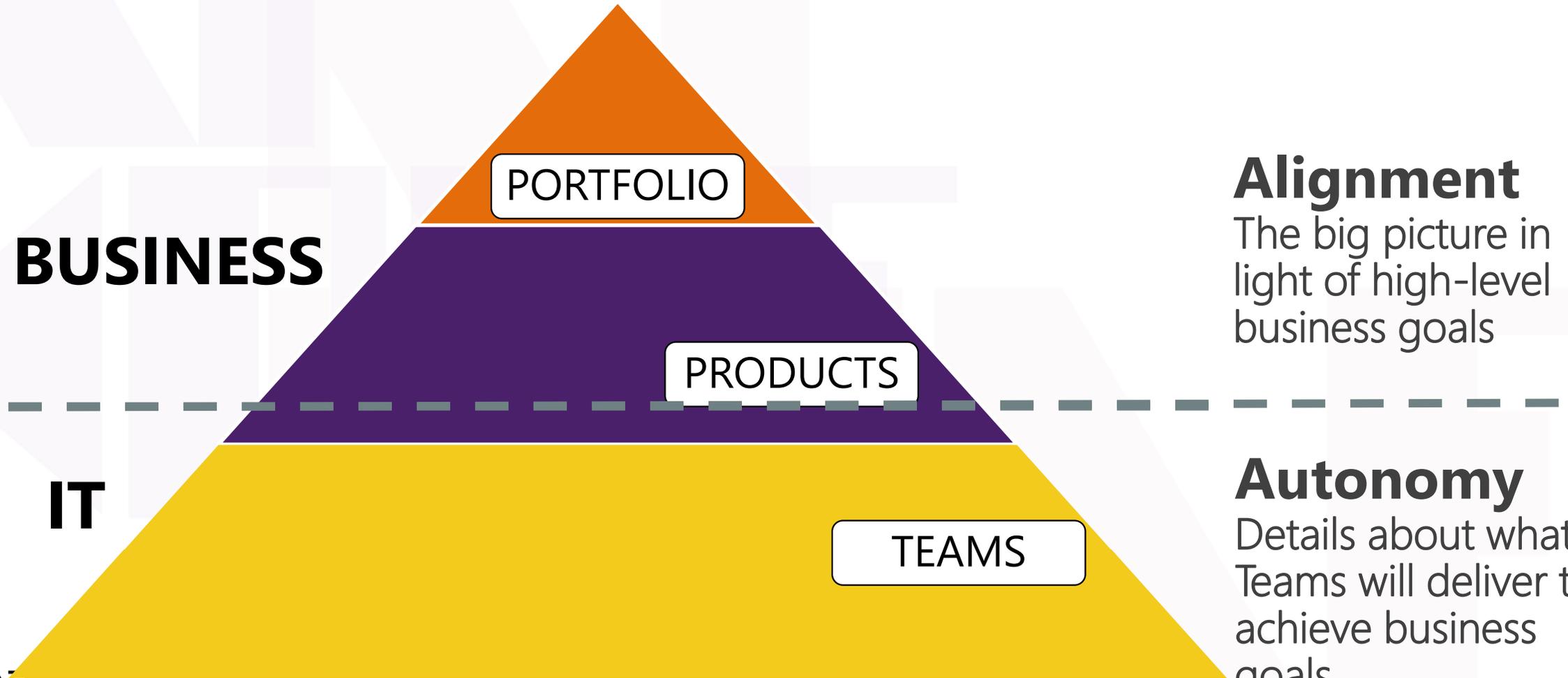
Different Processes By Different People



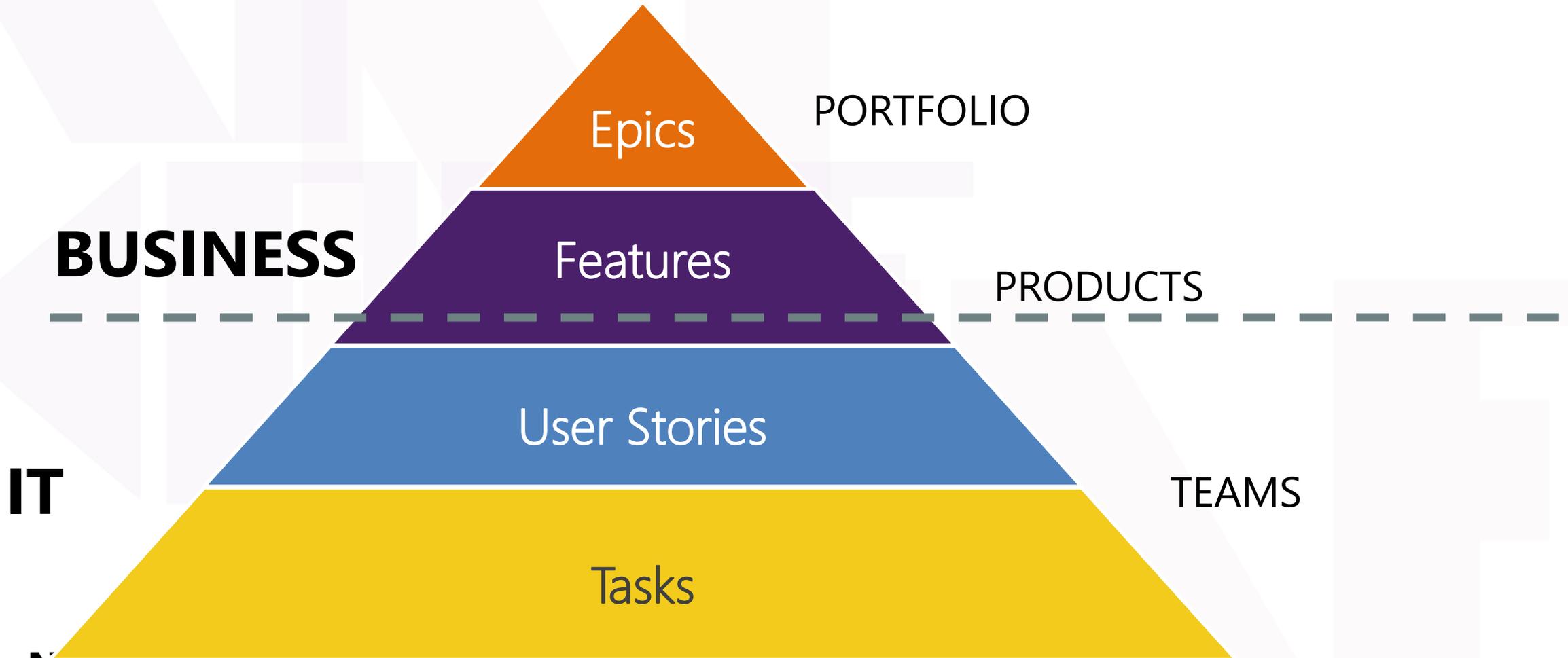
Different Processes By Different People



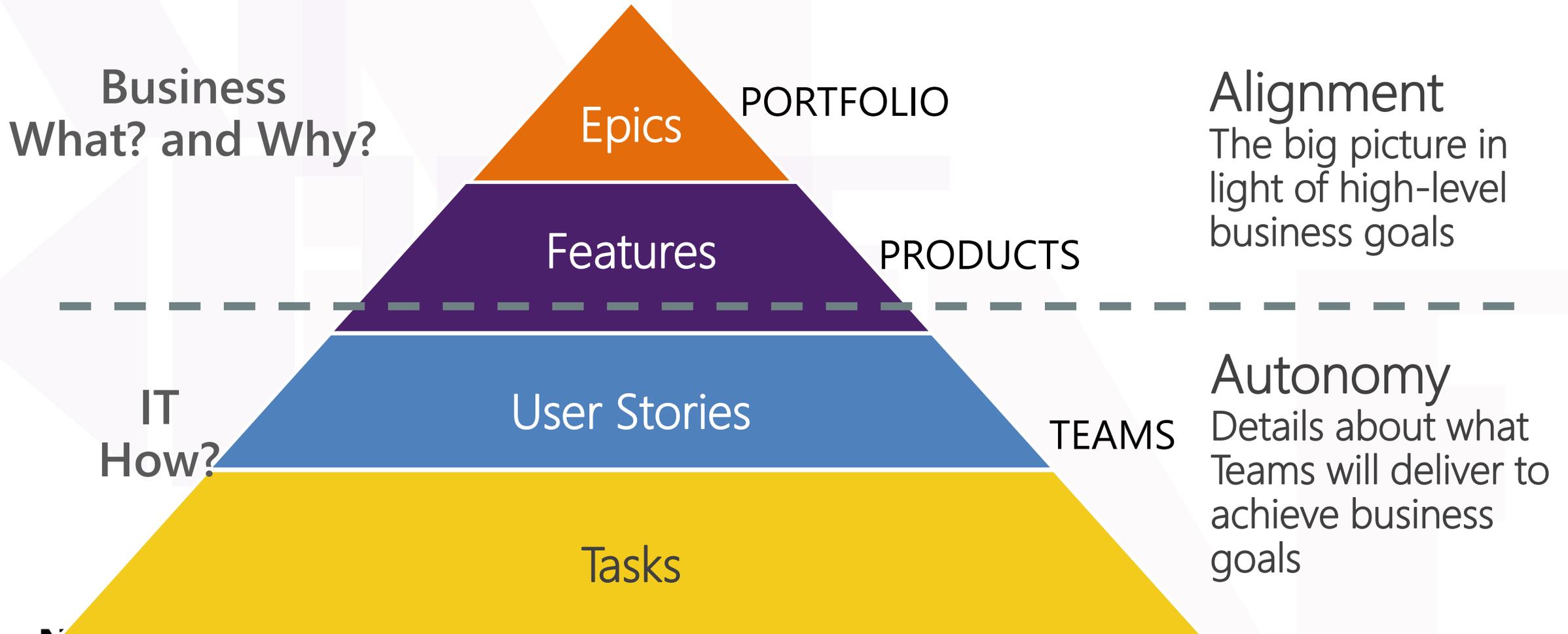
Aligned Autonomy



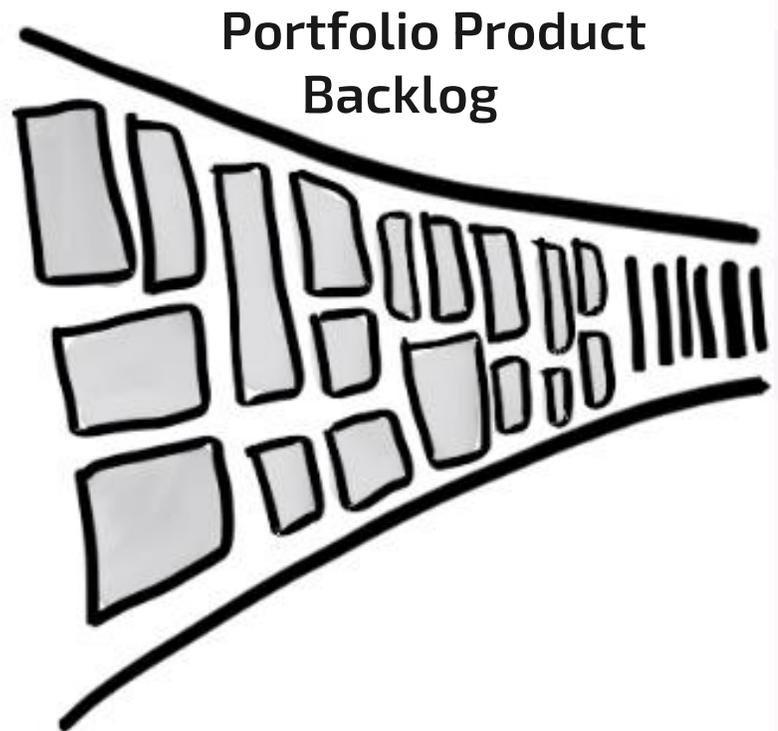
Portfolio Product Backlog Levels



Aligned Autonomy in Planning



Multiple Teams Working Together on the Portfolio

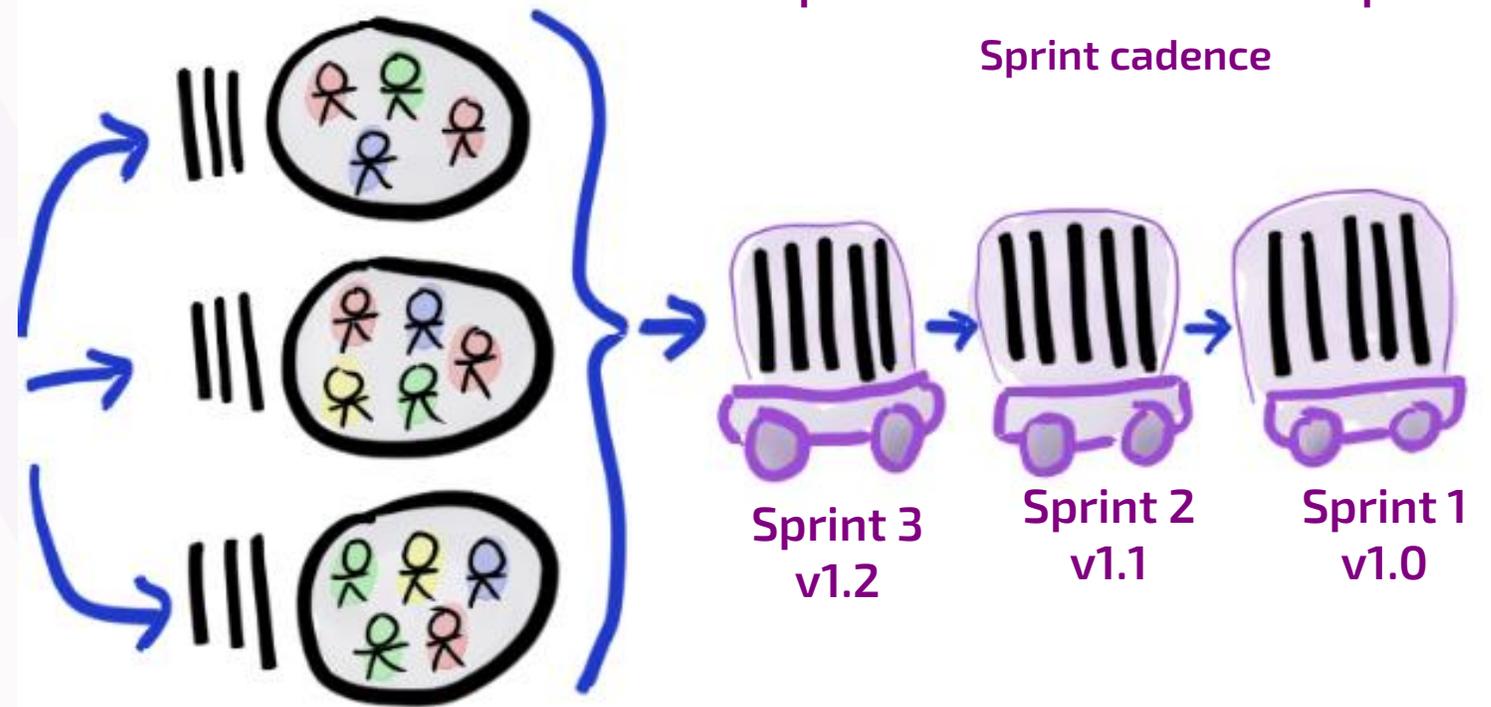


Team Backlogs

CI/CD

They produce an integrated product increment each sprint

Sprint cadence





Portfolio Product Backlog

**Basic Infrastructure for Portfolio
Management**

Portfolio Product Backlog (PPB)



Single source of truth for the entire organization

Contains all types of work from all available sources

Provides clear insight into status and future plans

Open to all stakeholders

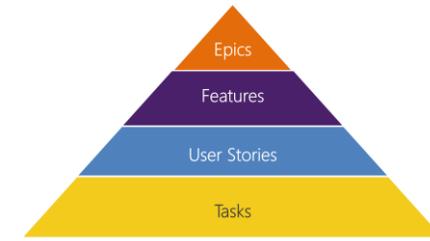
From development teams to business and end-users

While everyone can add items, the

Portfolio Product Owner maintains control

Compatible with both Agile and Traditional processes

PPB Is Easily Available



Available to different types of users

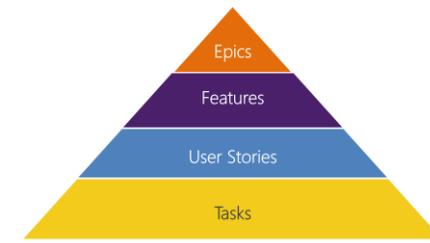
Management, Business, Stakeholders, Team members, End users

Available in different tools and forms

In Web, Desktop (Excel, Word, ...), APIs

Flat lists, Query results, Hierarchical trees, Boards, Dashboards, Reports

PPB Is Kept Up-To-Date



Work is done based on the lowest backlog levels

Higher backlog levels are kept always up-to-date

Status rolls up to higher levels

Updates occur in real time and continuously

Strategic decisions are based on the latest status

PPB is Particularly Effective for Agile



Foundation for Enterprise Agility

Allows for quick change in direction

Adjustments can occur at any level: portfolio, product, or team

Changes are possible in near real-time (next sprint or even immediately)

Facilitates continuous Rolling Planning

The background features a dark purple color with several overlapping, semi-transparent geometric shapes, including triangles and rectangles, creating a layered effect. On the right side, there is a large, solid brown circle. The text is centered horizontally and partially overlaps the purple shapes and the brown circle.

Azure DevOps Value Proposition

Azure DevOps Boards and Backlogs

Product Backlogs

Sprint Backlogs

Kanban Boards

Work Item Types

Epics

Features

Product Backlog

Items/User stories

Tasks

Bugs

Work Item Type	Title	State
Epic	Supporting Customers The Right Way!	New
Feature	Enhance Social Networking Experience	In Progress
Product Backlo...	Customer can become a Fan of Fabrikam Fiber on Facebook.	Approved
Task	Design fan page, get photos, logos, etc.	To Do
Task	Create Facebook fan page for Fabrikam Fiber.	In Progress

Backlog items

New < Approved 2/5 Committed 4/5 Done >

858 Support Ticket 2
Iteration Path Sprint 4
Area Path Support

891 PBI 4 4
Iteration Path
Area Path A

890 PBI 3 10
Iteration Path
Area Path B

888 PBI 1 8
Iteration Path
Area Path Development

859 Support Ticket 3
Iteration Path Sprint 4
Area Path Support

857 Support Ticket 1
Adam Barr
Iteration Path Sprint 4
Area Path Support

893 Support Ticket B
Iteration Path Sprint 3
Area Path Support

892 Support Ticket A
Iteration Path Sprint 3
Area Path Support

685 Technician can send GPS location from iPhone. 4
Brian Keller
Iteration Path
Area Path B
0/1

680 Technician can edit customer contact details on Windows Phone. 12
Brian Keller
Iteration Path Sprint 4
Area Path B
1/4

852 Customer can use the hot-line. 8
Julia Ilyana
Iteration Path Sprint 4
Area Path A
1/4

670 Technician can report busy/late on Windows Phone. 8
Brian Keller
Iteration Path Sprint 3
Area Path B
4/4

665 Technician can see service tickets on Windows Phone. 10
Brian Keller
Iteration Path Sprint 3

Portfolio Backlogs in Azure DevOps

Hierarchical Areas

- Hierarchical Teams
- Hierarchical Backlogs
- → Portfolio Backlog



Different levels of abstraction

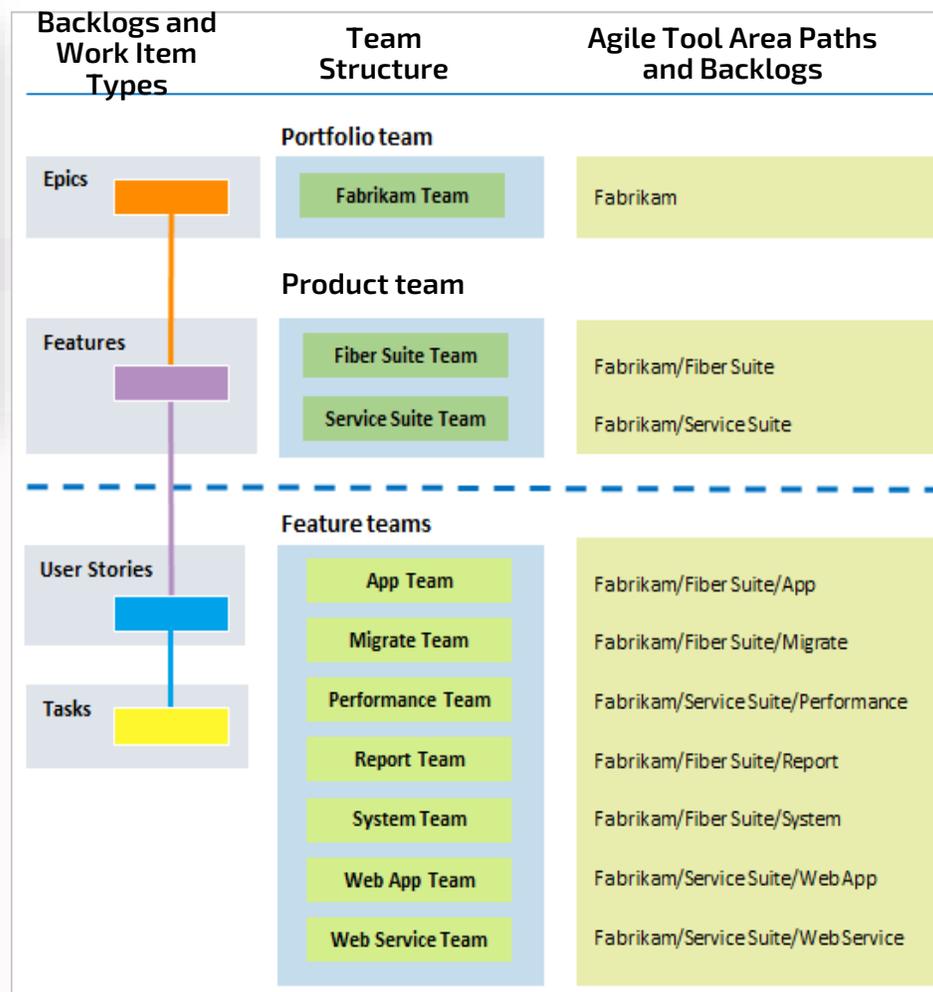
Business, PM, Development

Distinct work item type per level

Epic, Feature, Backlog Item, Task

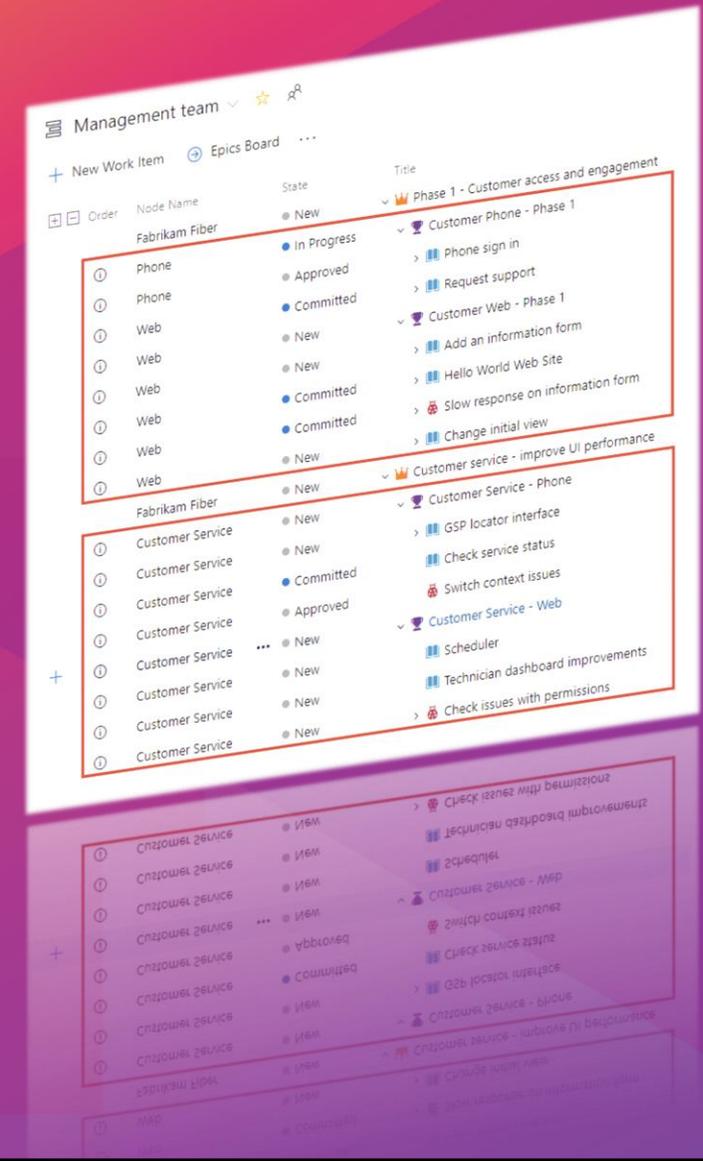
Every team manages its own backlog

Aligned autonomy



DEMO

Setting up the Hierarchy of Teams Using Portfolio Backlog Using Team Backlogs





Rolling Planning

Rolling Planning – Aligned Autonomy

Leadership is responsible
for **the Big Picture**

WHAT are we building?

WHY are we building it?



Teams are responsible
for **the Detail**

HOW are we building it?

Are we building it with

QUALITY?

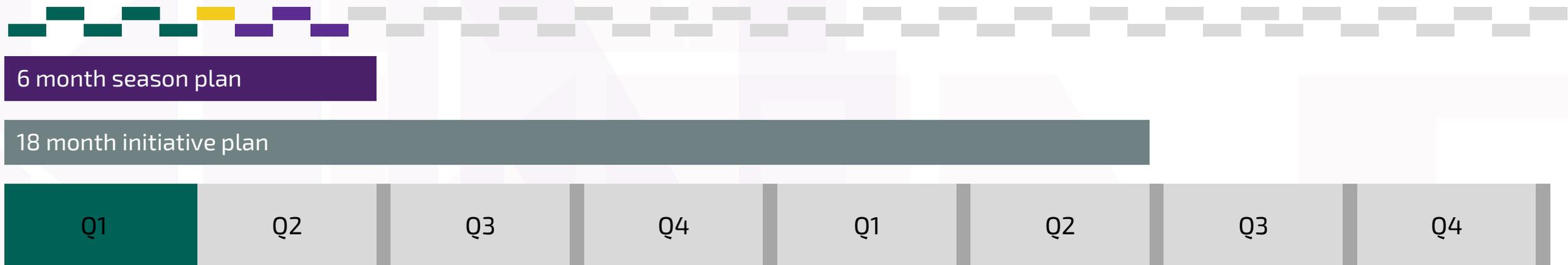
Rolling Planning



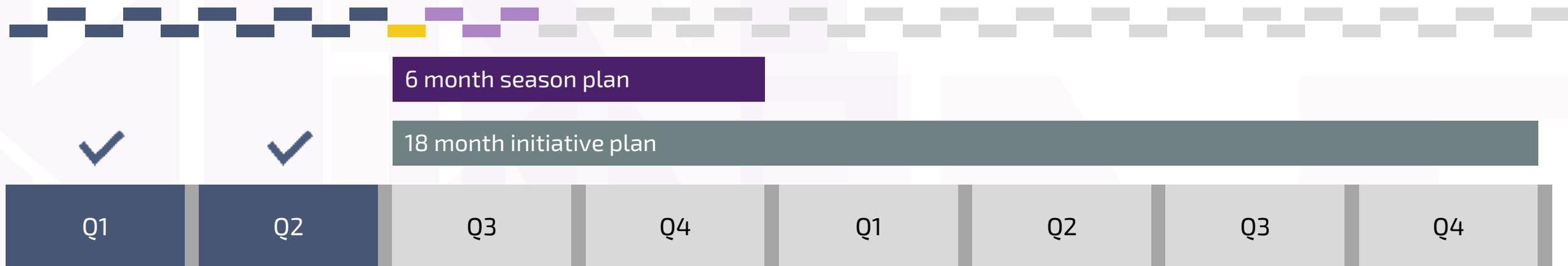
Rolling Planning (after 3 weeks)



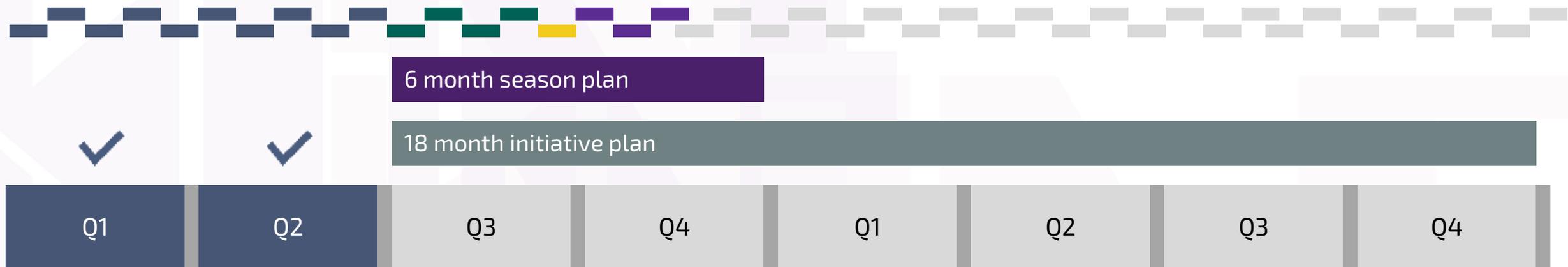
Rolling Planning (after a quarter)



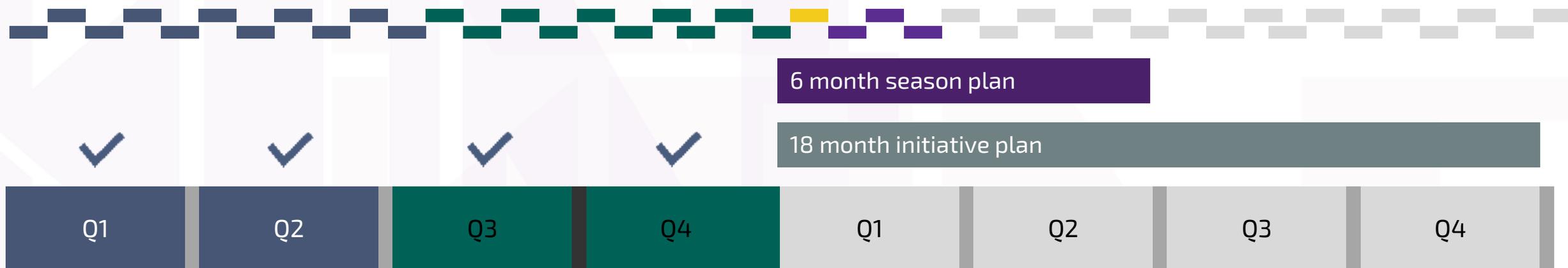
Rolling Planning (after two quarters)



Rolling Planning (after three quarters)



Rolling Planning (after one year)



Rolling Planning vs. Long-Term Planning



Rolling Planning is essential for Enterprise Agility

Ensures continuous high quality of the plan

Enables more frequent planning cycles

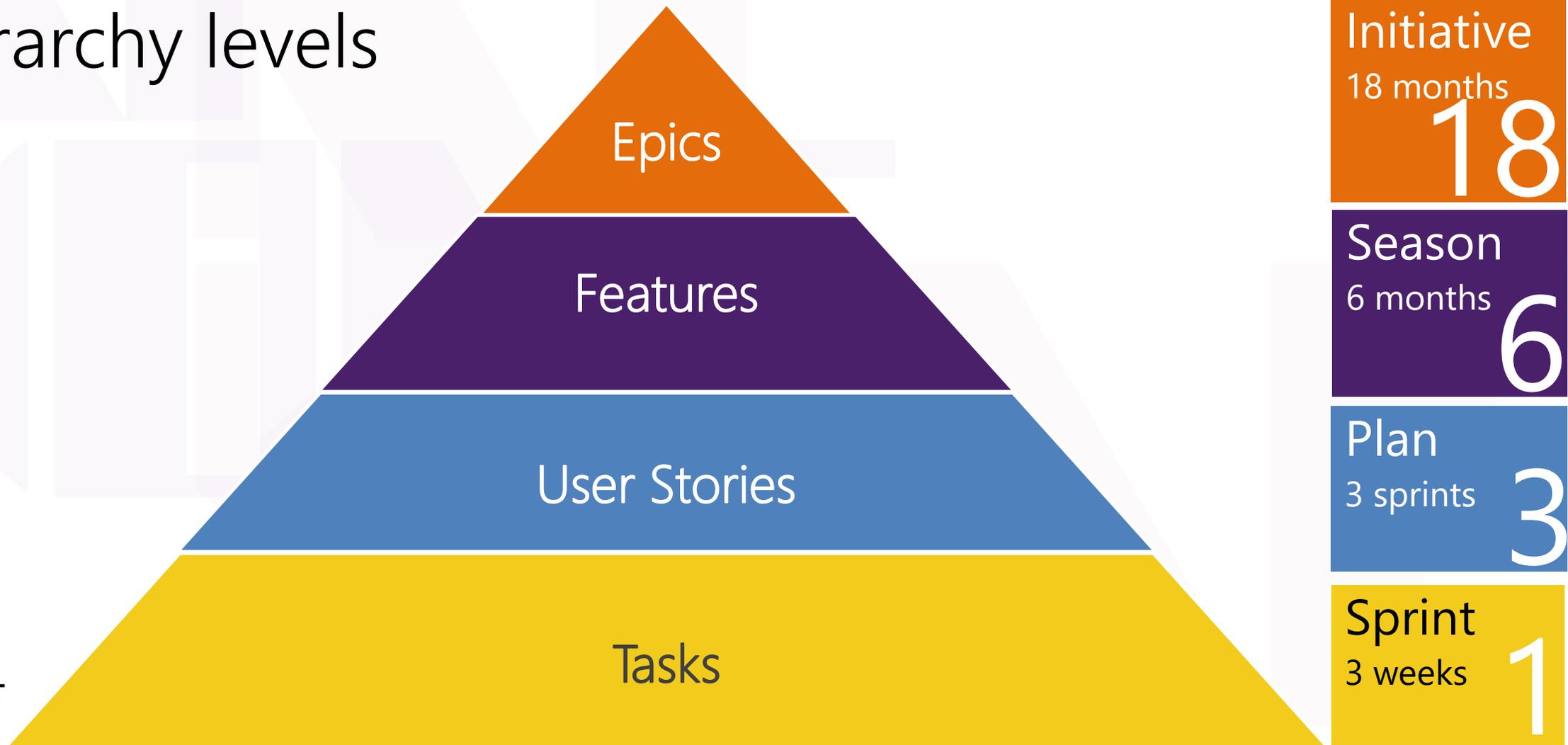
Streamlines planning: making it efficient, cost-effective, and repeatable

Long-term plans tend to lose relevance quickly

Long planning cycles create plans detached from reality

Rolling Planning and Backlog Hierarchies

Rolling planning horizons correspond to backlog hierarchy levels





**Visualize Portfolio Product Backlog
using
Delivery Plans**

Delivery Plans

Map backlog on the calendar

Visualize release plans

Multiple teams and sprints

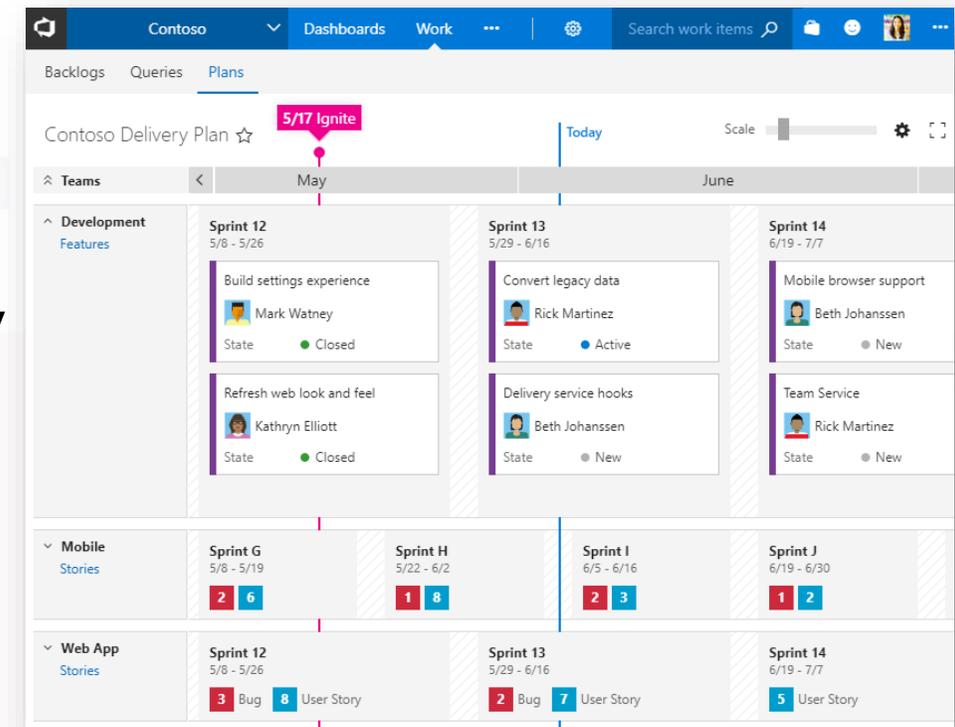
Review the work scheduled for delivery

Fine-tune the plan at a global scope

Highlight key dates

Collapsed Views for Summary Info

Expanded view for details



Visualize Portfolio Backlog Using Delivery Plans

Visualize and manage the portfolio

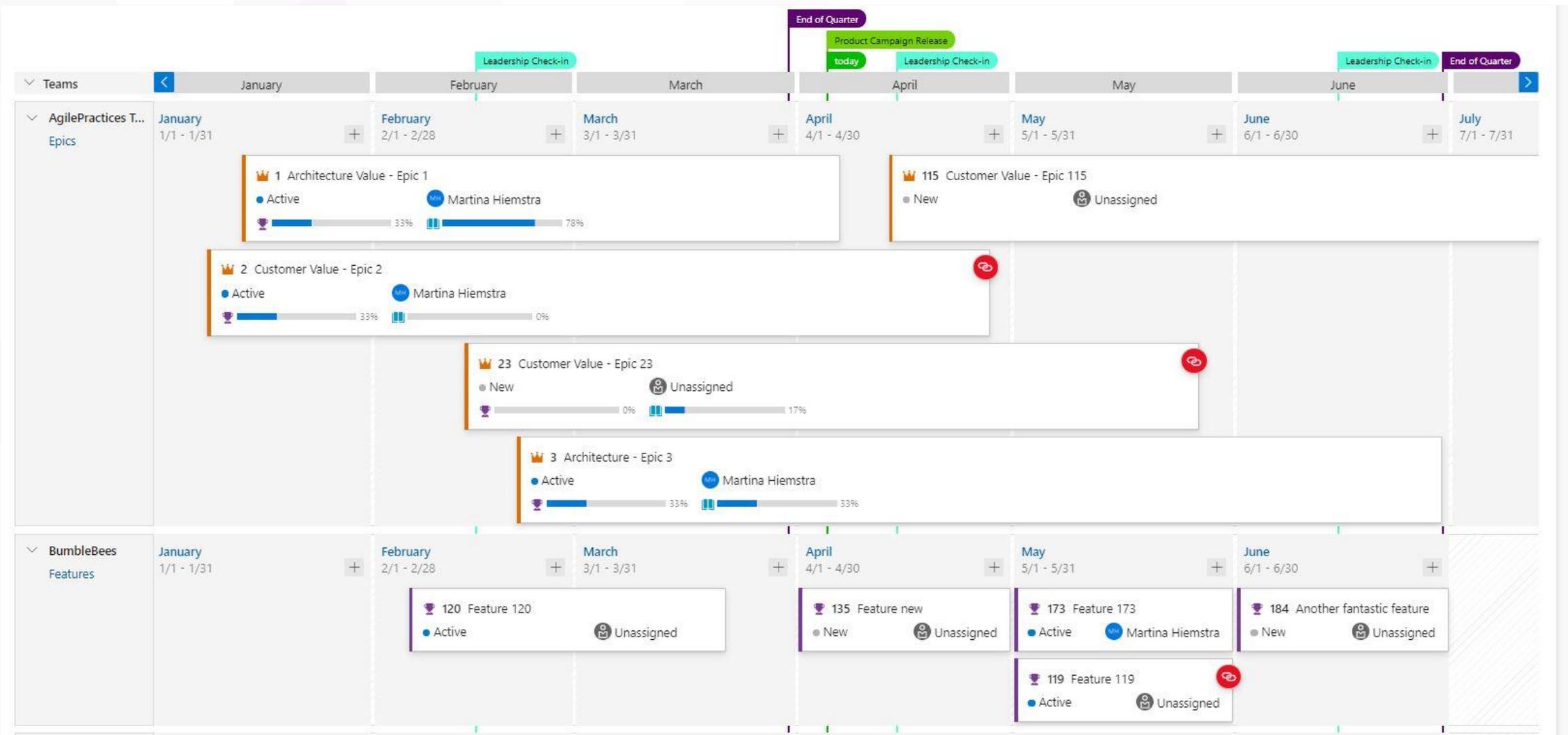
Balance work between sprints

Visualize, identify and resolve any resource bottlenecks and conflicts

Facilitate release planning with milestones

Visualize and identify dependencies

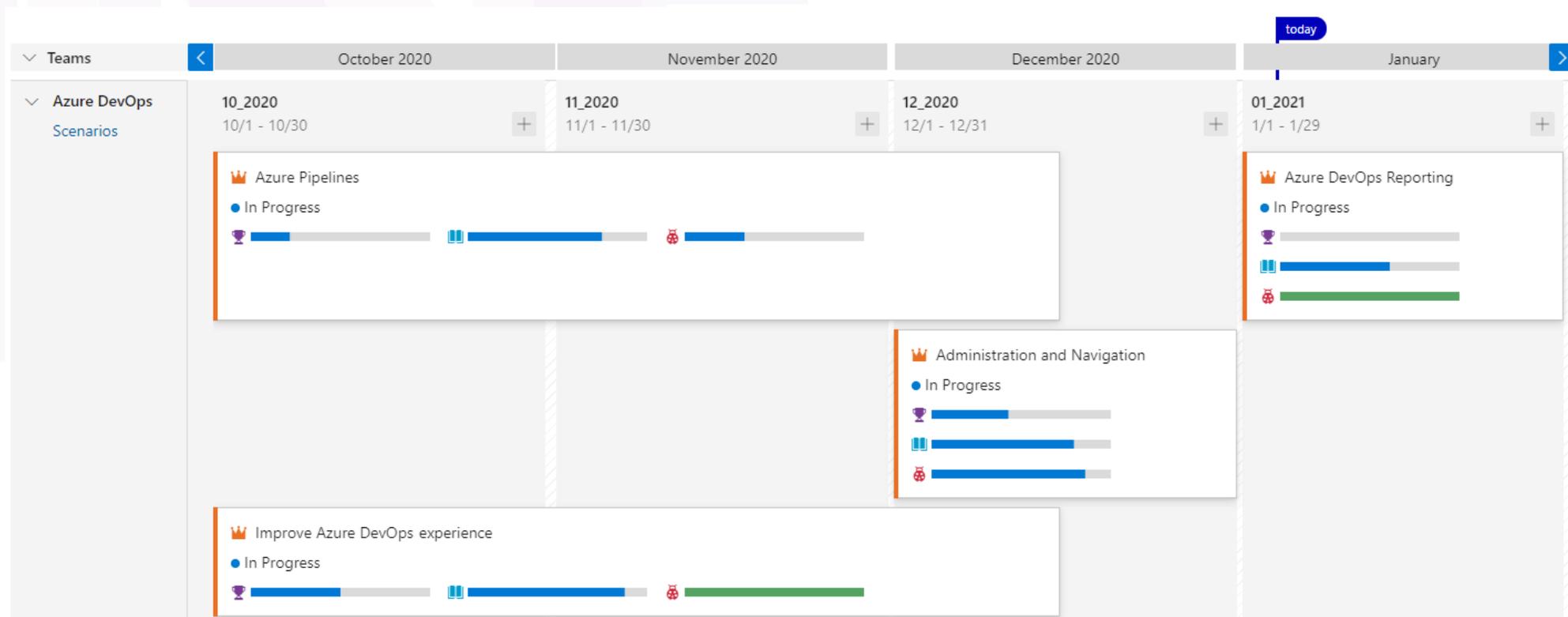
Delivery Plans



Delivery Plans and PPB Higher Levels

Items spanning one or more sprints

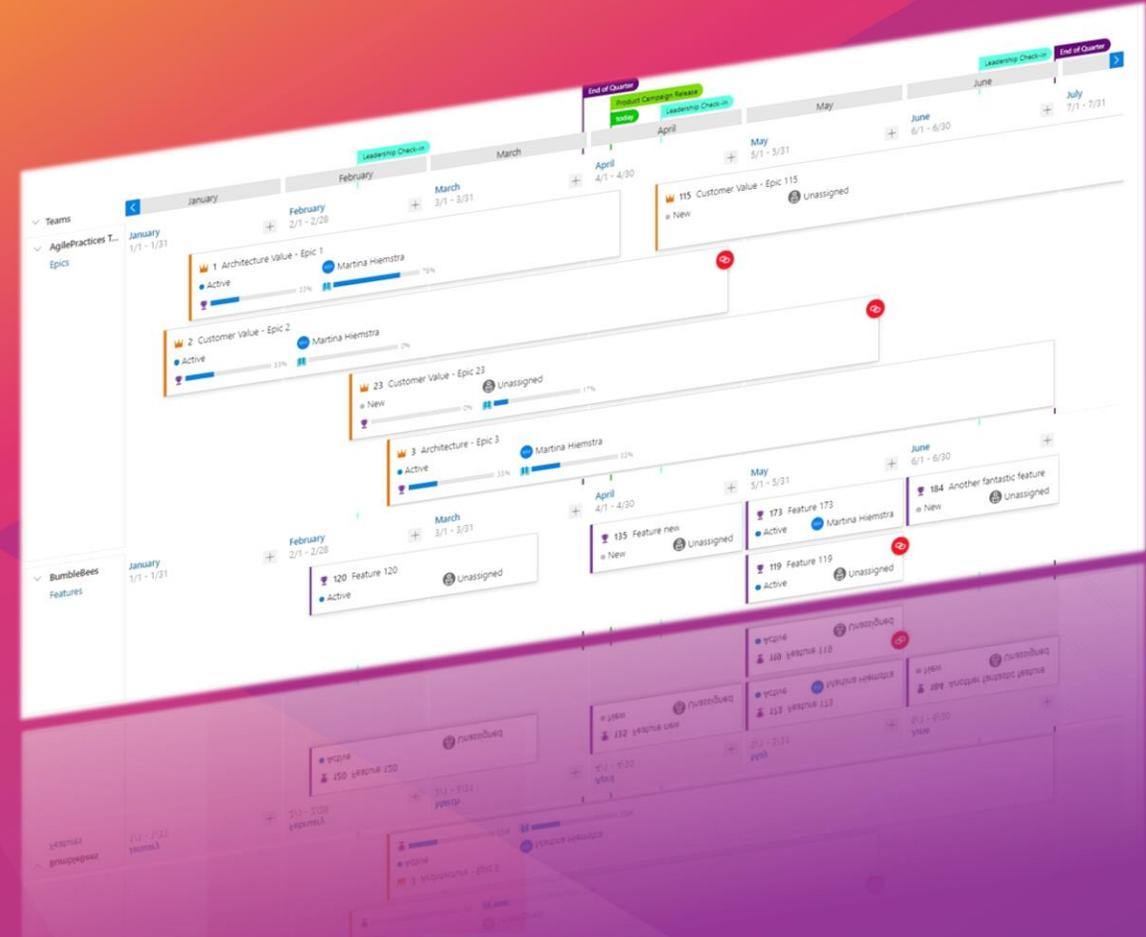
Rollup of features and epics



DEMO

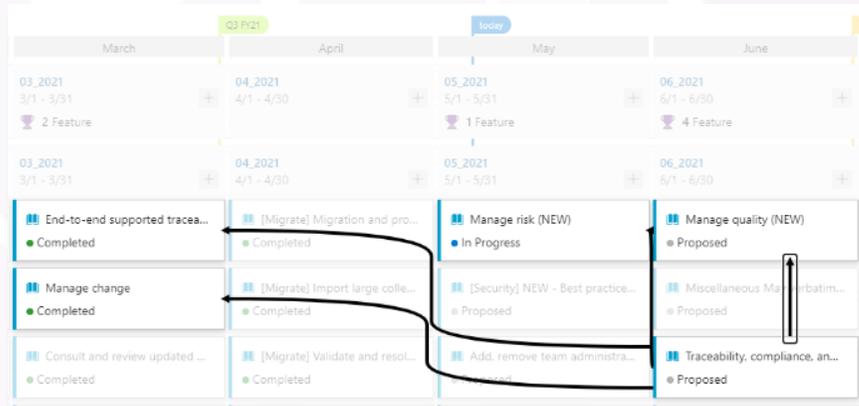
Setting up Delivery Plans
Multiple Teams
Milestones
Styles

Collapsed View - Summary
Info
Rollup

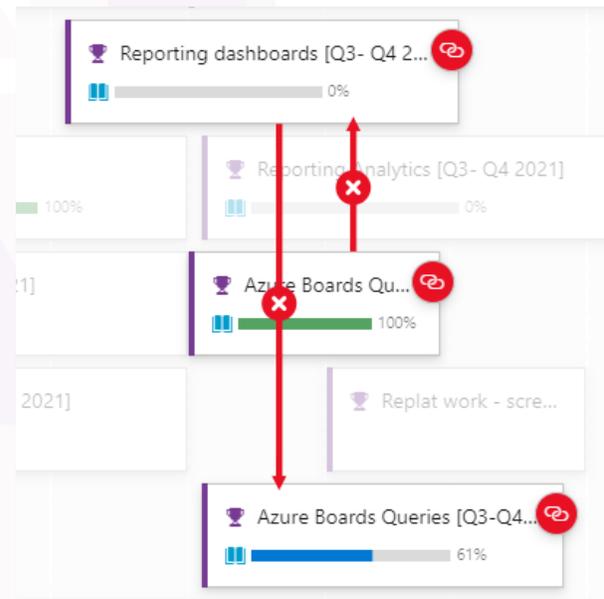


Track Dependencies by Using Delivery Plans

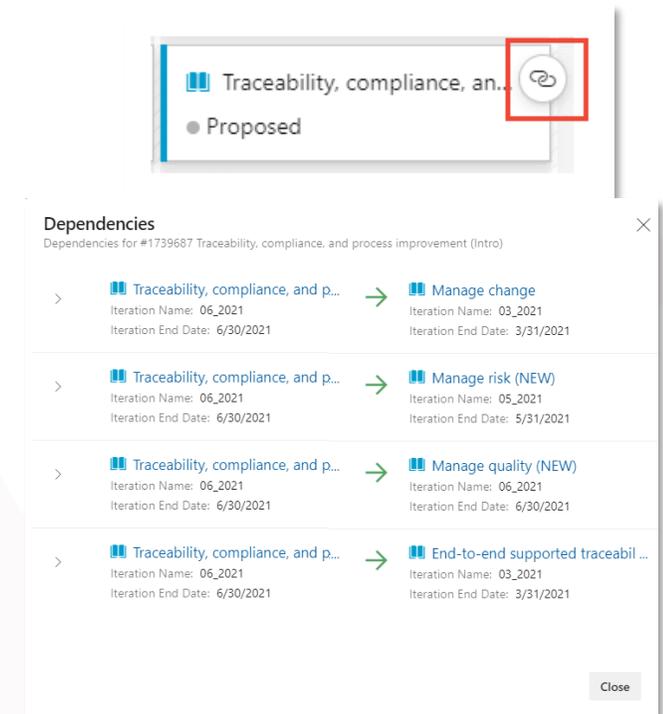
Show Dependencies based on Predecessor / Successor link type between work items.



Issues shown as red lines
Issue: successor scheduled to end **before** than the predecessor is completed

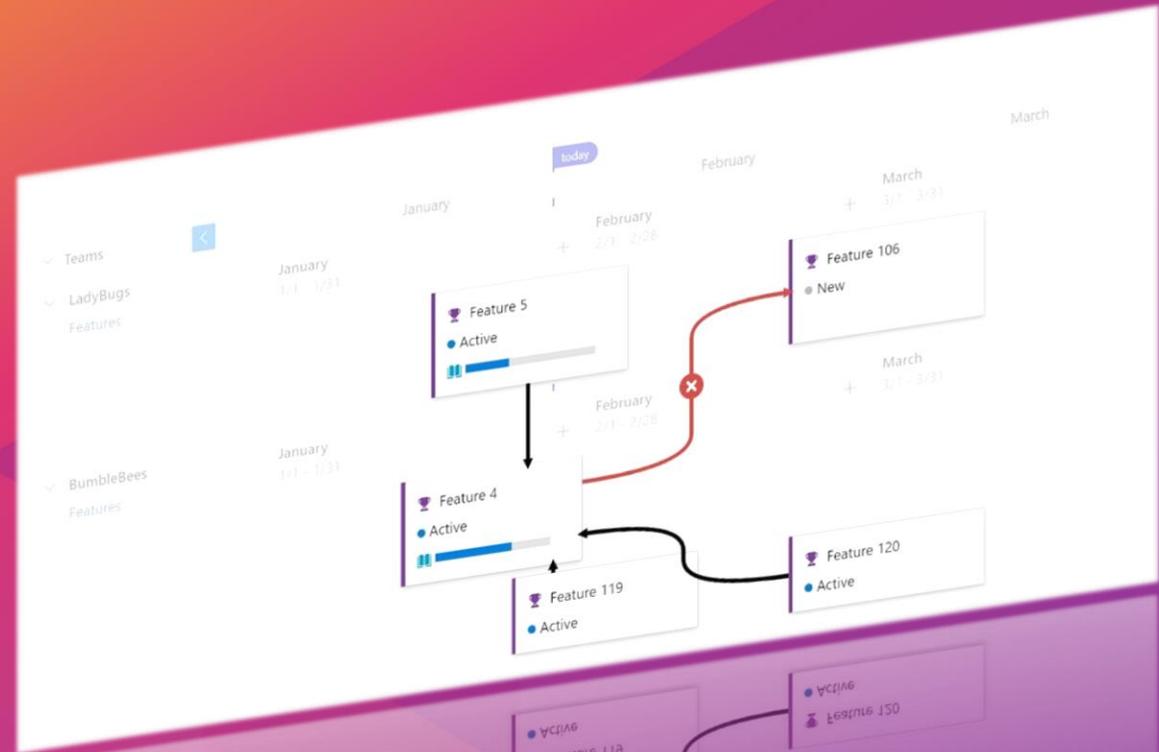


Dependency Summary



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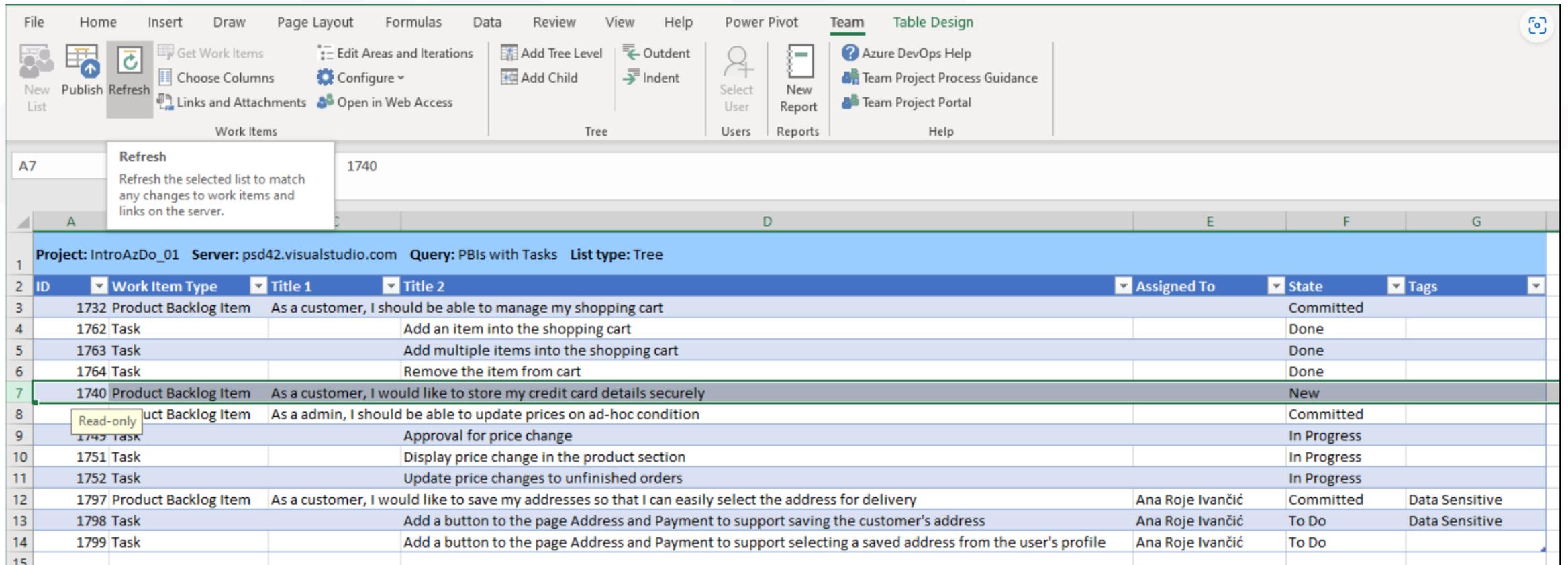
Track Dependencies



Highlight: Excel Integration

Useful for offline distribution

Retrieve and keep lists in sync + bulk add/edit



The screenshot shows the Microsoft Excel interface with the 'Team' ribbon selected. The ribbon includes groups for 'Work Items', 'Tree', 'Users', 'Reports', and 'Help'. The 'Refresh' button in the 'Work Items' group is highlighted, and a tooltip is displayed over it. The tooltip text reads: 'Refresh Refresh the selected list to match any changes to work items and links on the server.'

The data table below is a project backlog with the following columns: ID, Work Item Type, Title 1, Title 2, Assigned To, State, and Tags. The table contains 15 rows of data, with row 7 highlighted in green.

ID	Work Item Type	Title 1	Title 2	Assigned To	State	Tags
1732	Product Backlog Item	As a customer, I should be able to manage my shopping cart			Committed	
1762	Task		Add an item into the shopping cart		Done	
1763	Task		Add multiple items into the shopping cart		Done	
1764	Task		Remove the item from cart		Done	
1740	Product Backlog Item	As a customer, I would like to store my credit card details securely			New	
1749	Product Backlog Item	As a admin, I should be able to update prices on ad-hoc condition			Committed	
1749	Task		Approval for price change		In Progress	
1751	Task		Display price change in the product section		In Progress	
1752	Task		Update price changes to unfinished orders		In Progress	
1797	Product Backlog Item	As a customer, I would like to save my addresses so that I can easily select the address for delivery		Ana Roje Ivančić	Committed	Data Sensitive
1798	Task		Add a button to the page Address and Payment to support saving the customer's address	Ana Roje Ivančić	To Do	Data Sensitive
1799	Task		Add a button to the page Address and Payment to support selecting a saved address from the user's profile	Ana Roje Ivančić	To Do	



Closing

Call to Action

Backlog as a Prerequisite for Enterprise Agility

Create Portfolio Product Backlog Today
Hierarchical, Available, Up-To-Date
Introduce Rolling Planning

Consider using Azure DevOps
Feature-rich hierarchical backlog
implementation
Delivery plans for efficient visual management

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Empowering Portfolio Management with
Azure DevOps:
A Journey to Enterprise Agility

Unleashing Agile Transformation:
A Scrum and Azure DevOps Approach