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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

Agilist IT INFORMATION TECHNOLOGIES

Scrum.org The Home of Scrum

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

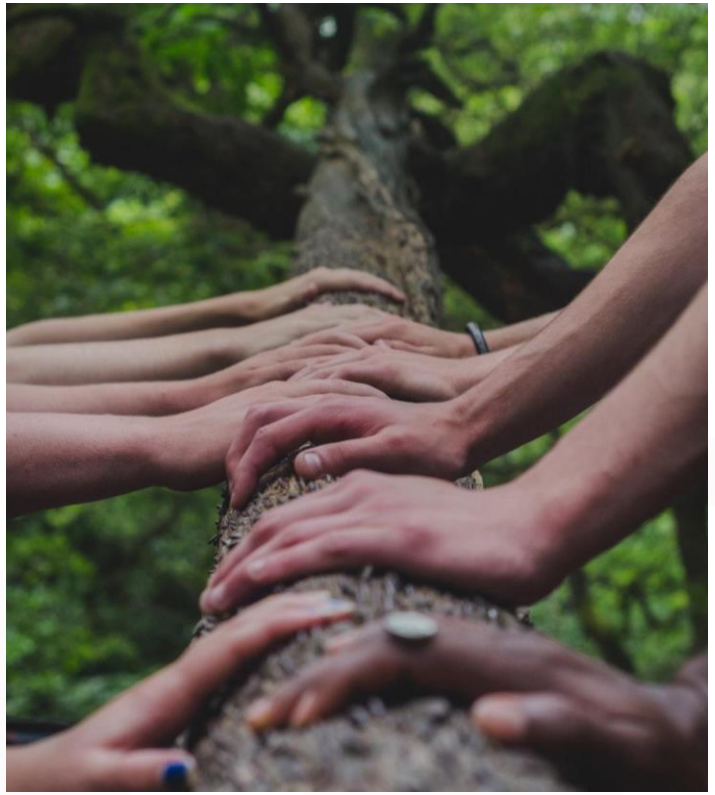
Identifying Diverse Needs and Priorities

Making Conflicts Visible and Clear

Clarifying and Defining Priorities

Resolving Conflicts at the Appropriate Level

Leveraging the Right Tools



Maximizing delivered value

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Navigating Complexity of Portfolio Management

Managing at different levels: Enterprise to Team

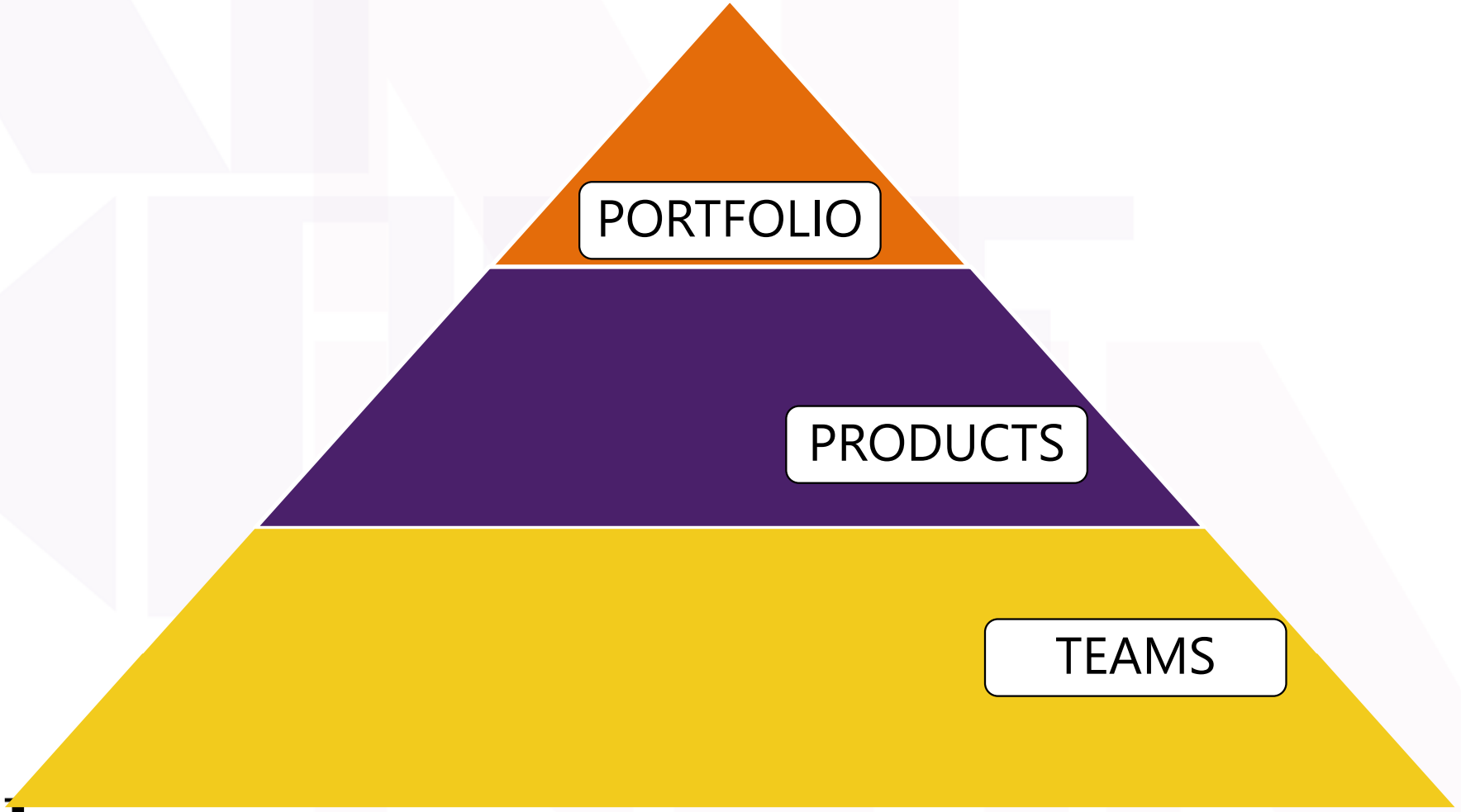
- Different Processes
- Different People Involved

Information Flow

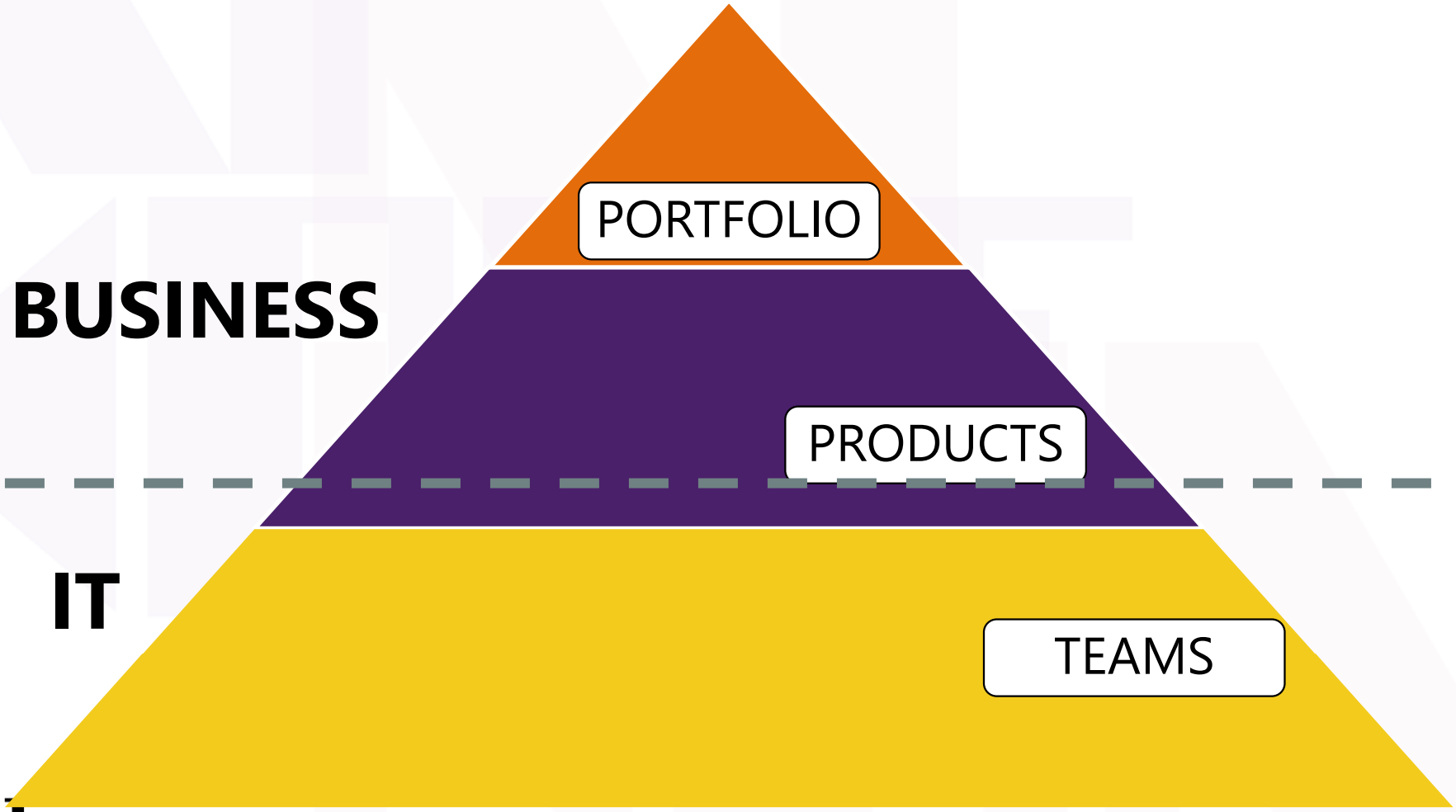
- Strategy Decision Flow: Top-Down
- Implementation and Status Reporting: Bottom-Up

Maximizing delivered value

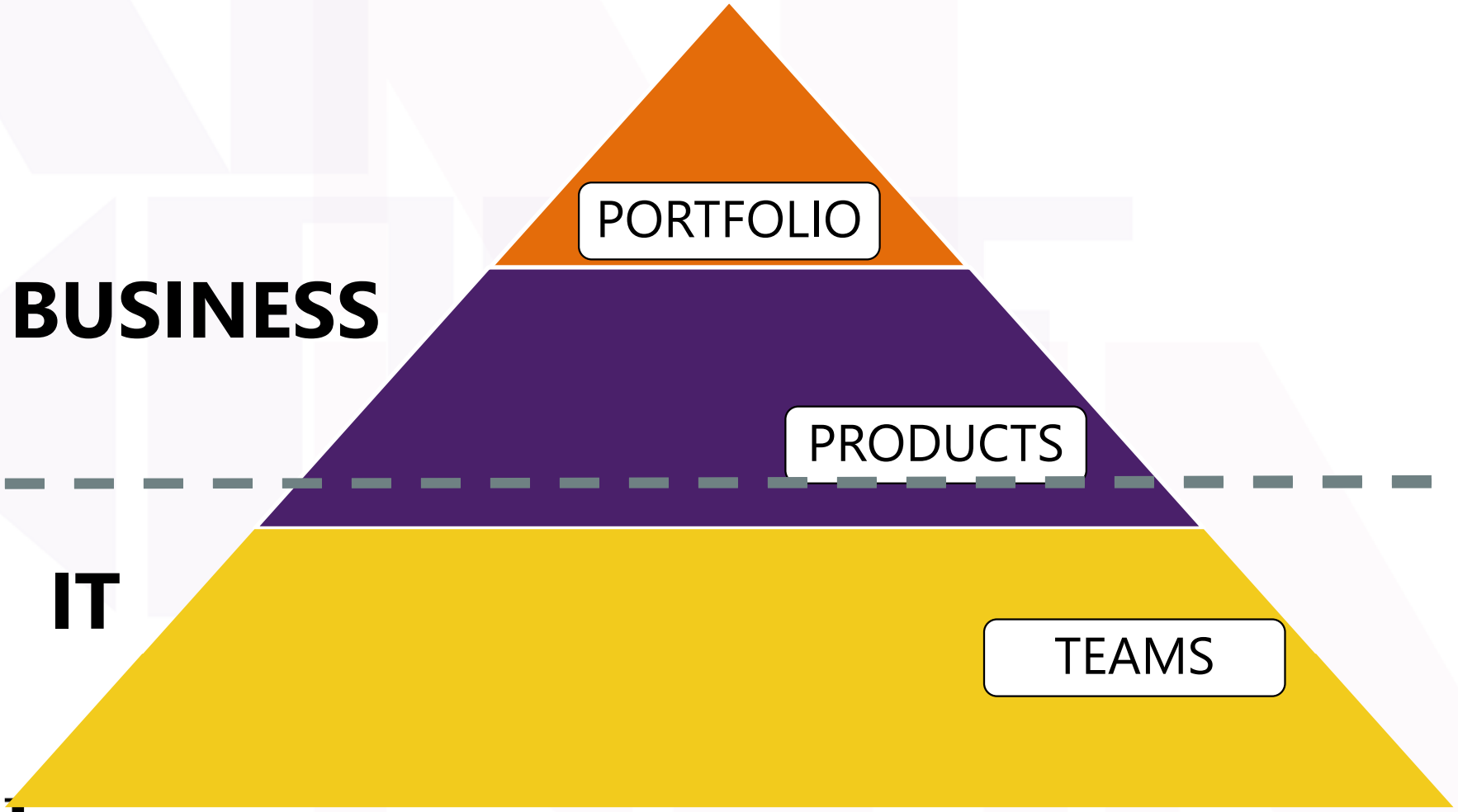
Different Processes At Different Levels



Different Processes By Different People



Different Processes By Different People



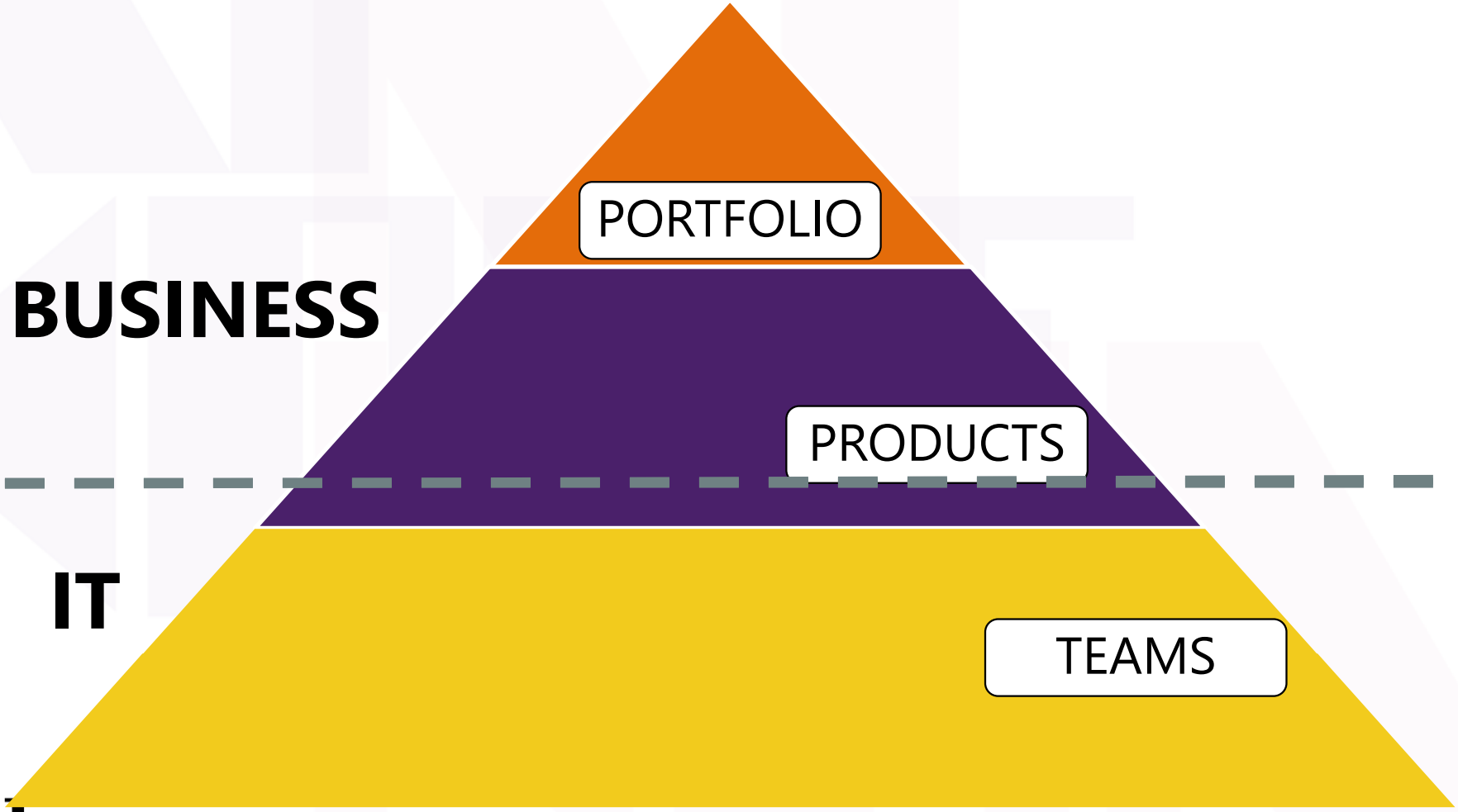
BUSINESS

IT

What? and Why?

How?

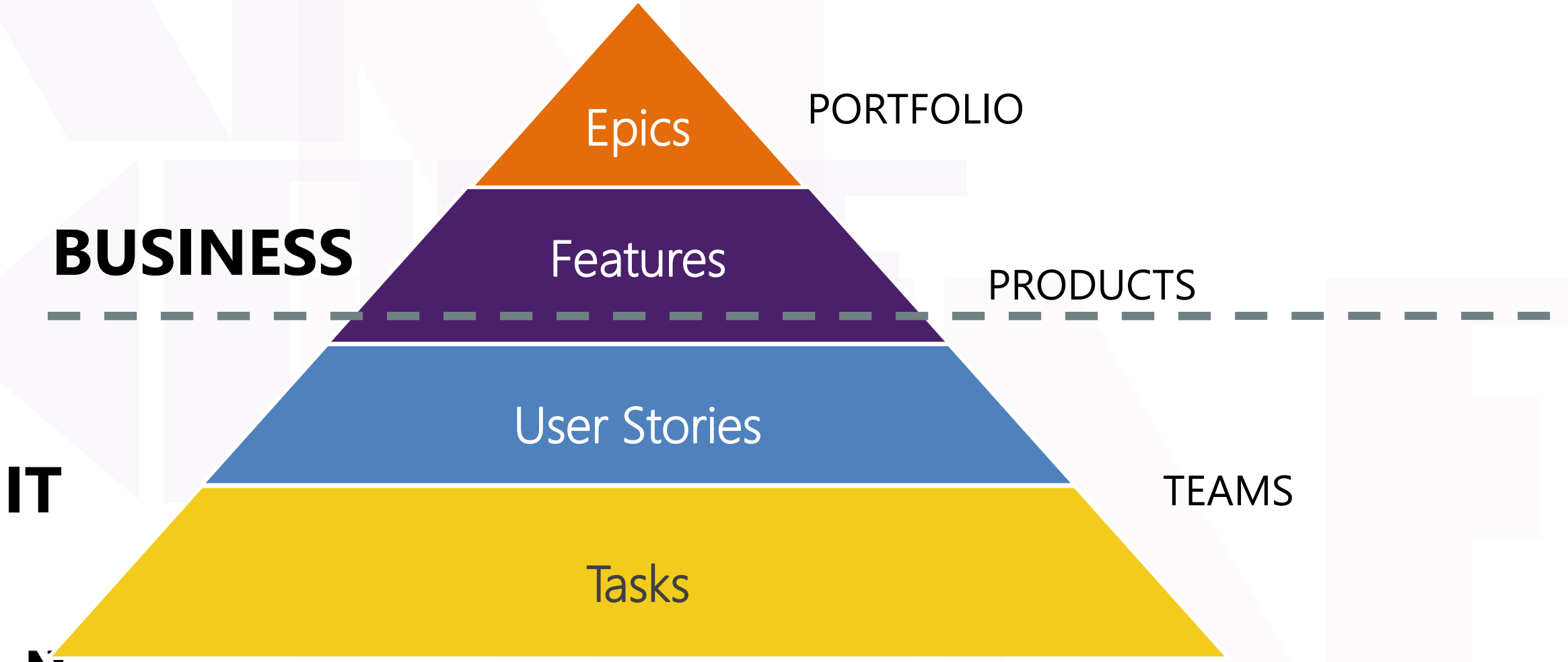
Aligned Autonomy



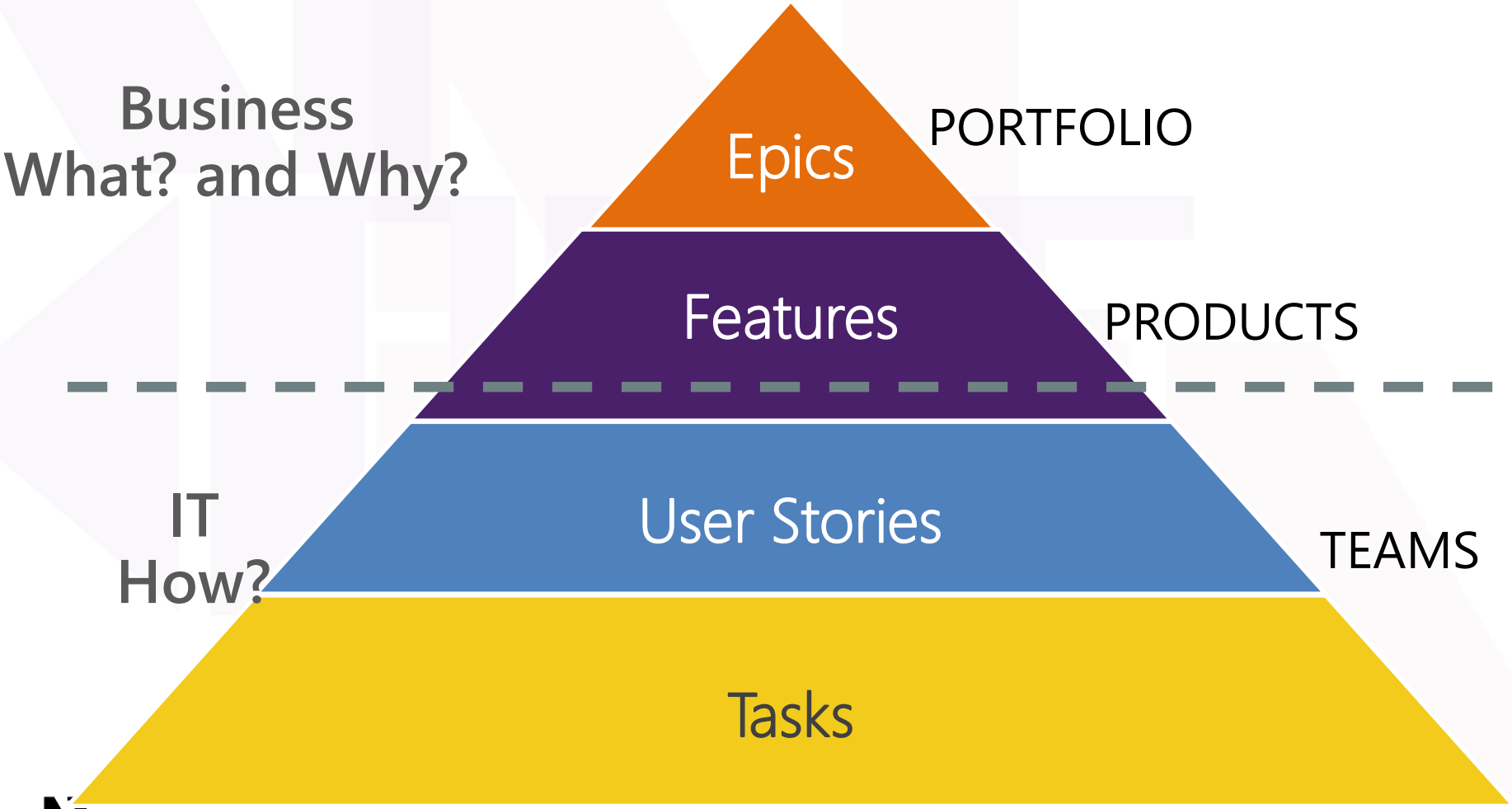
Alignment
The big picture in light of high-level business goals

Autonomy
Details about what Teams will deliver to achieve business goals

Portfolio Product Backlog Levels



Aligned Autonomy in Planning



Alignment

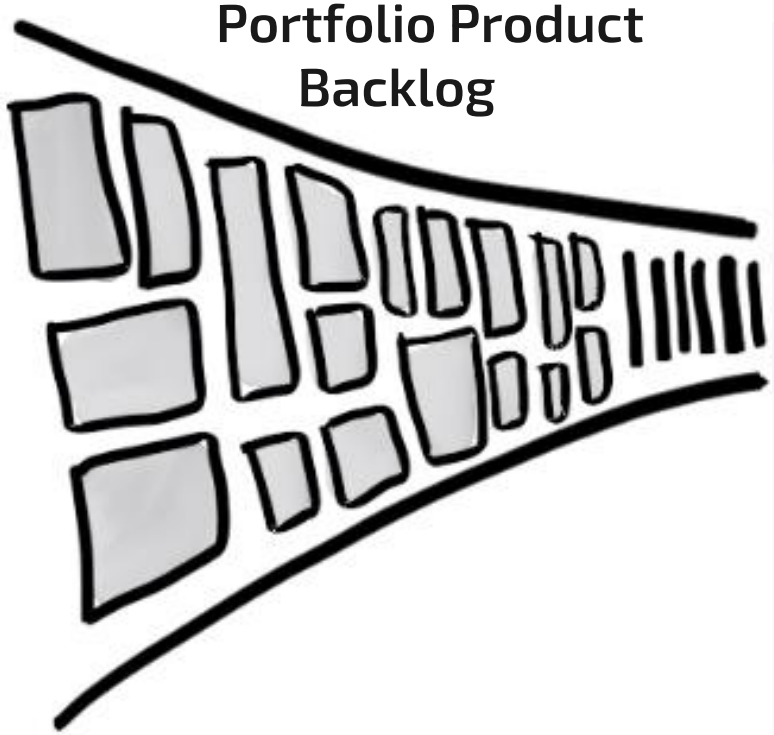
The big picture in light of high-level business goals

Autonomy

Details about what Teams will deliver to achieve business goals

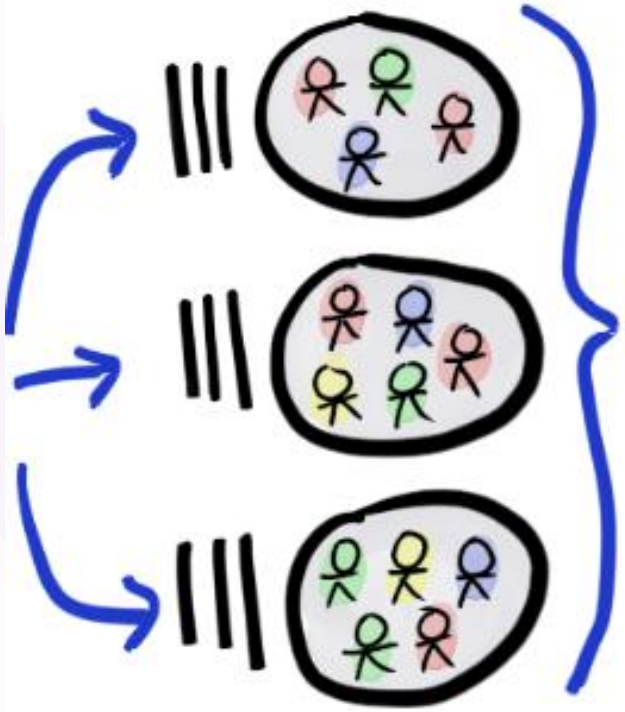
Multiple Teams Working Together on the Portfolio

Portfolio Product Backlog



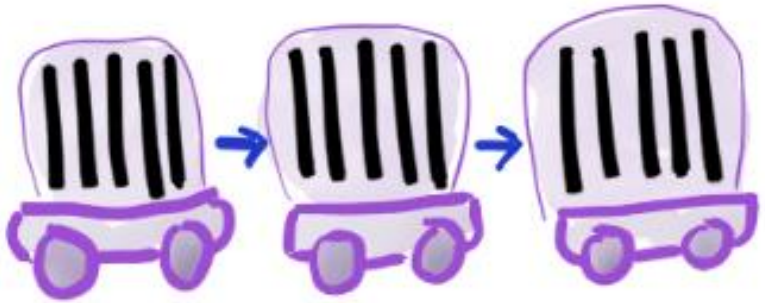
Team Backlogs

CI/CD



They produce an integrated product increment each sprint

Sprint cadence



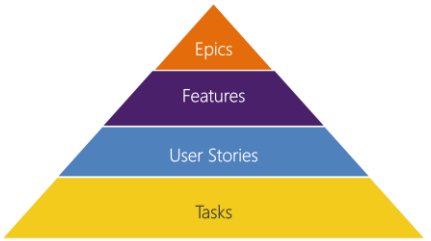
Sprint 3 v1.2

Sprint 2 v1.1

Sprint 1 v1.0

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

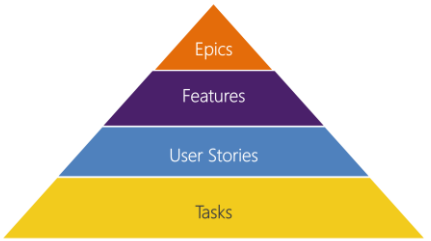
Provides clear insight into status and future plans

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



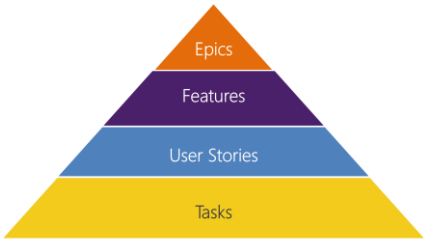
Available to different types of users

- 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



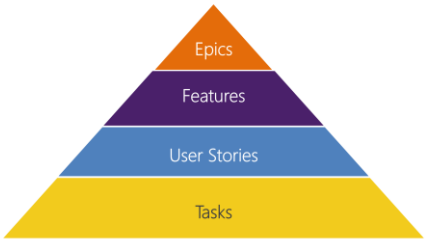
Work is done based on the lowest backlog levels

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

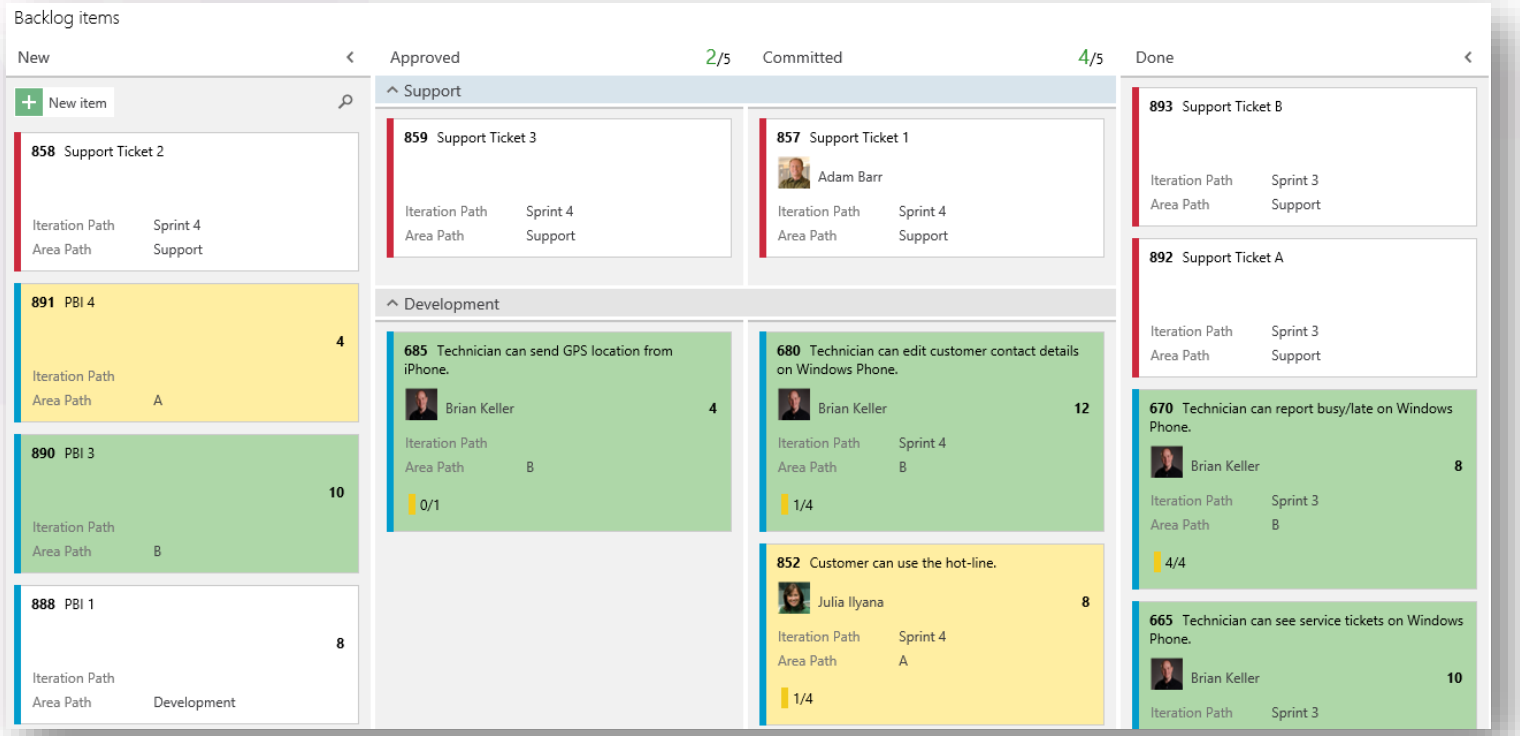
- Adjustments can occur at any level: portfolio, product, or team
- Changes are possible in near real-time (next sprint or even immediately)

Facilitates continuous Rolling Planning

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



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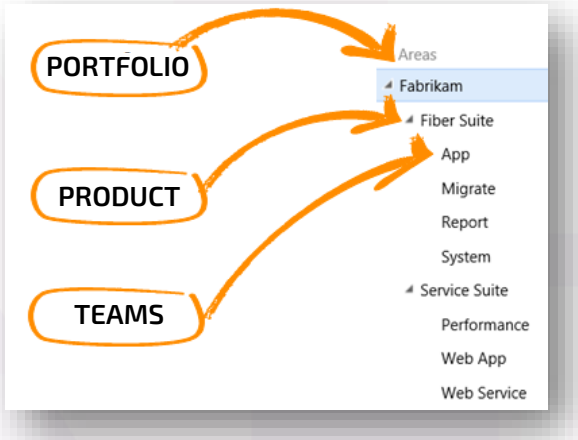
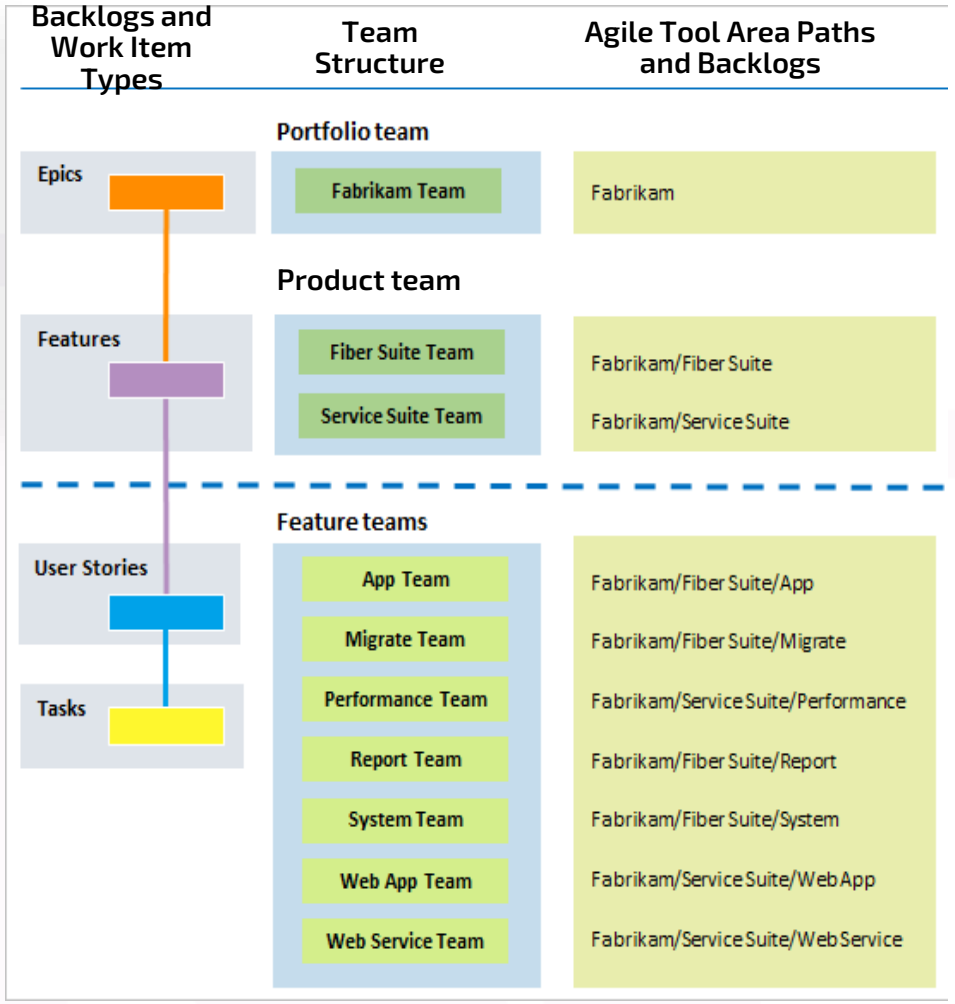
Portfolio Backlogs in Azure DevOps

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

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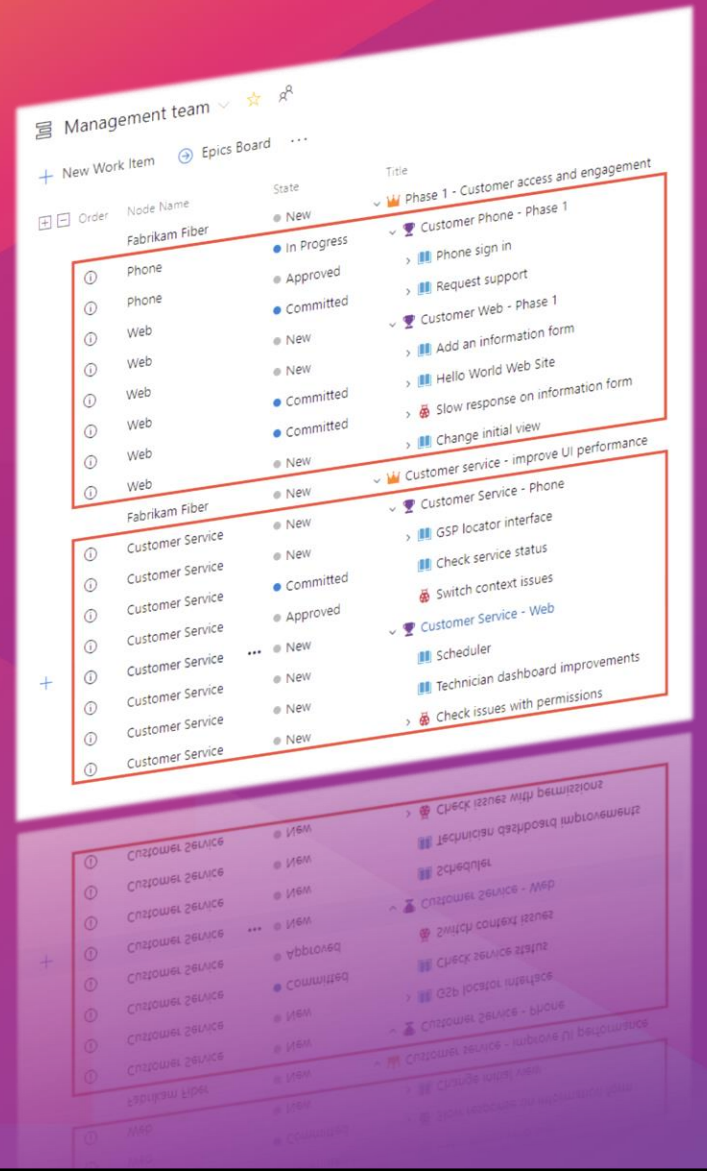
DEMO
Setting up the Hierarchy of Teams Using Portfolio Backlog Using Team Backlogs



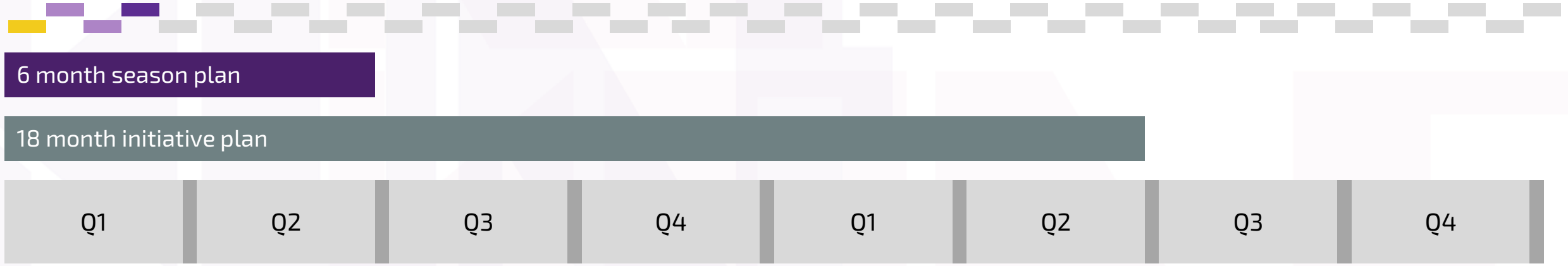
Rolling Planning

Rolling Planning – Aligned Autonomy

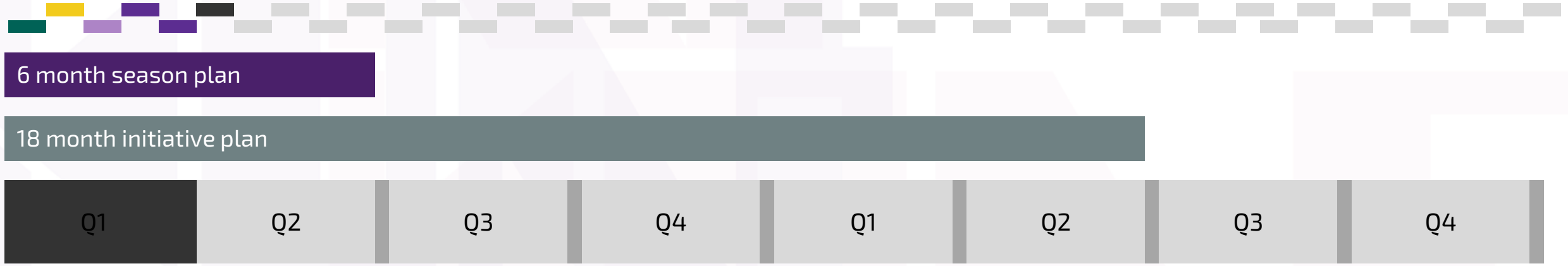
Leadership is responsible for the Big Picture
WHAT are we building?
WHY are we building it?

Teams are responsible for the Detail
HOW are we building it?
Are we building it with QUALITY?

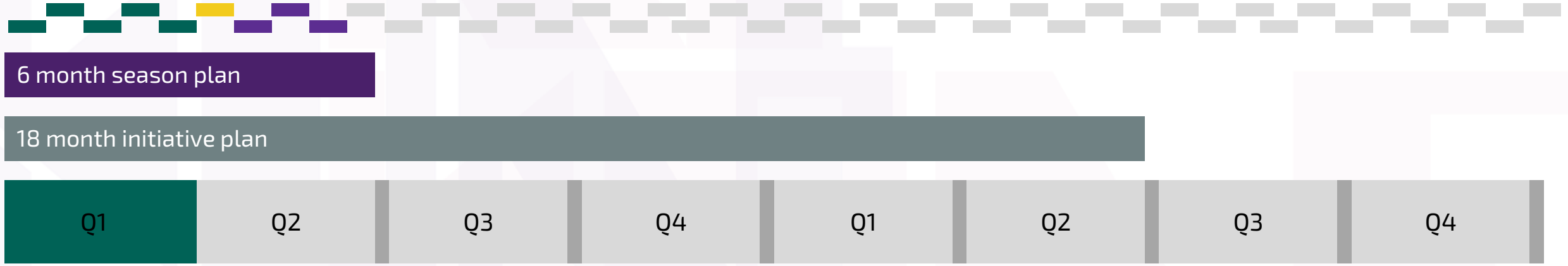
Rolling Planning



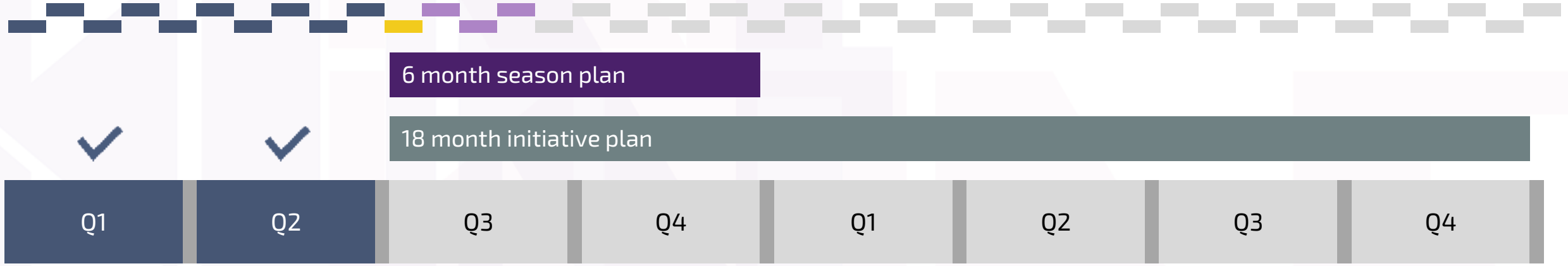
Rolling Planning (after 3 weeks)



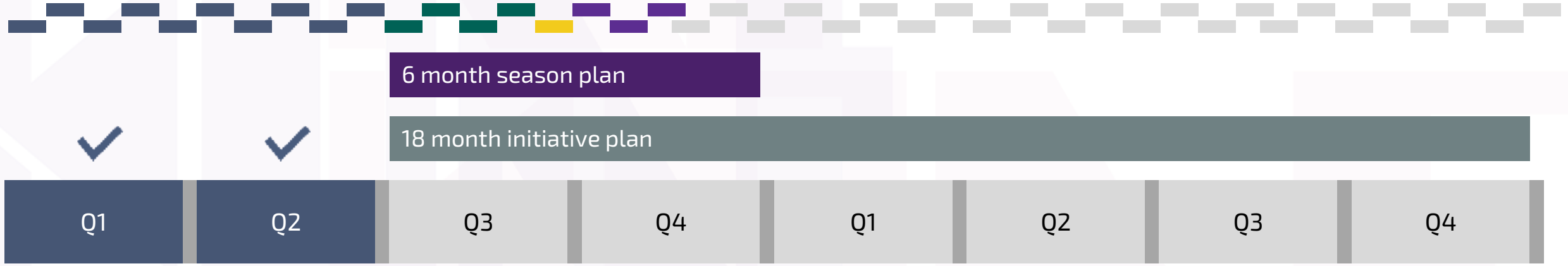
Rolling Planning (after a quarter)



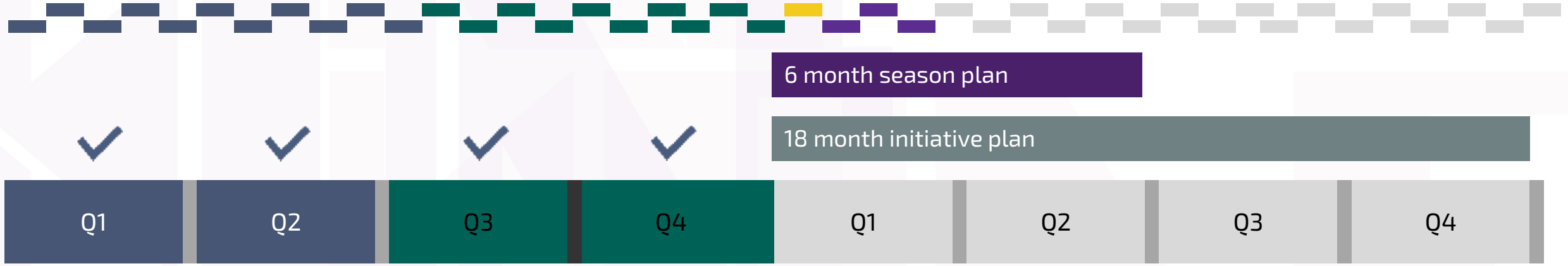
Rolling Planning (after two quarters)



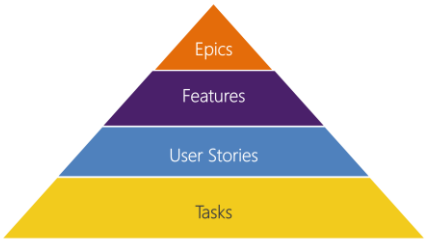
Rolling Planning (after three quarters)



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

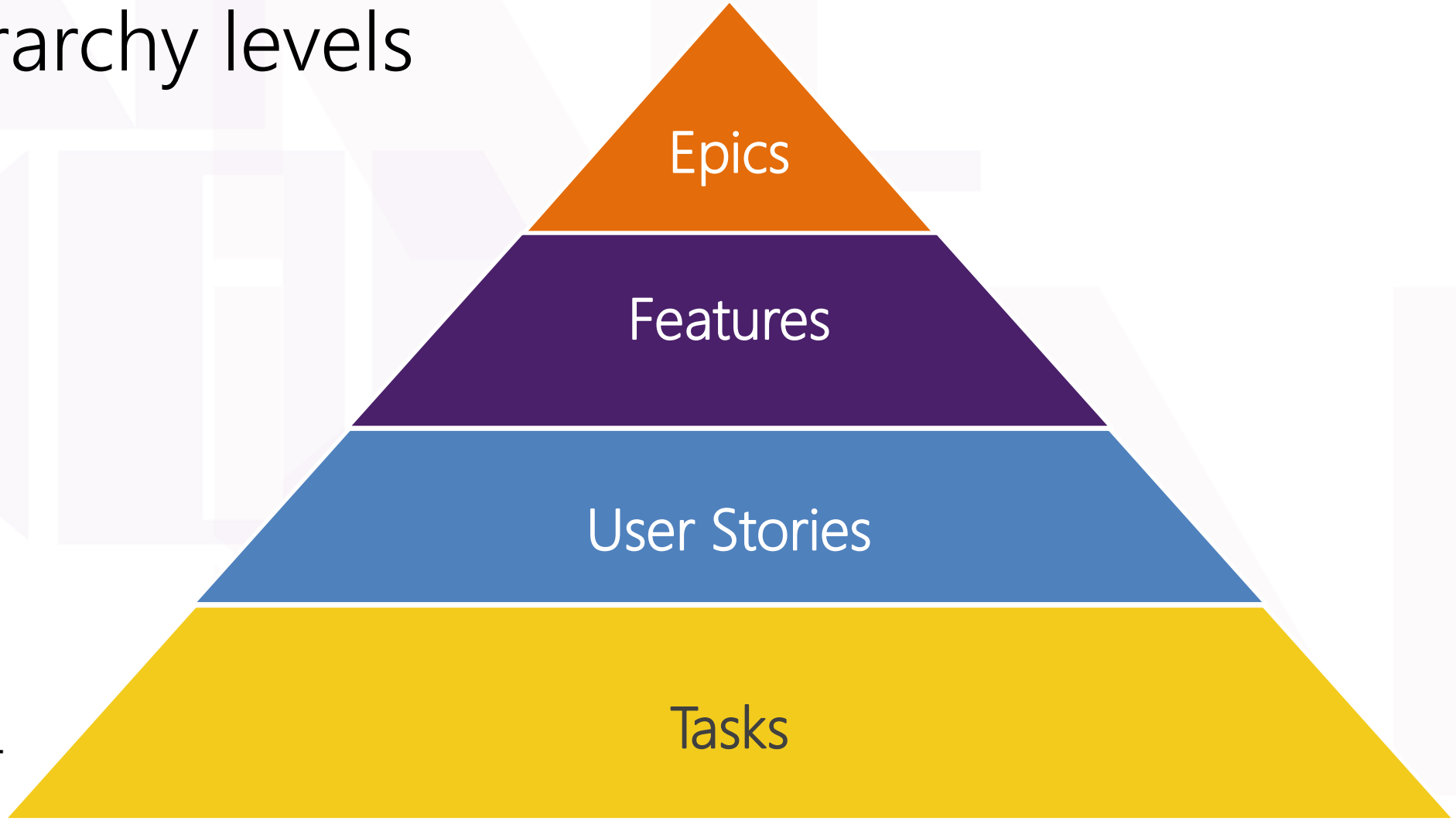
- Streamlines planning: making it efficient, cost-effective, and repeatable

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



Initiative
18 months
18

Season
6 months
6

Plan
3 sprints
3

Sprint
3 weeks
1

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Visualize Portfolio Product Backlog using Delivery Plans

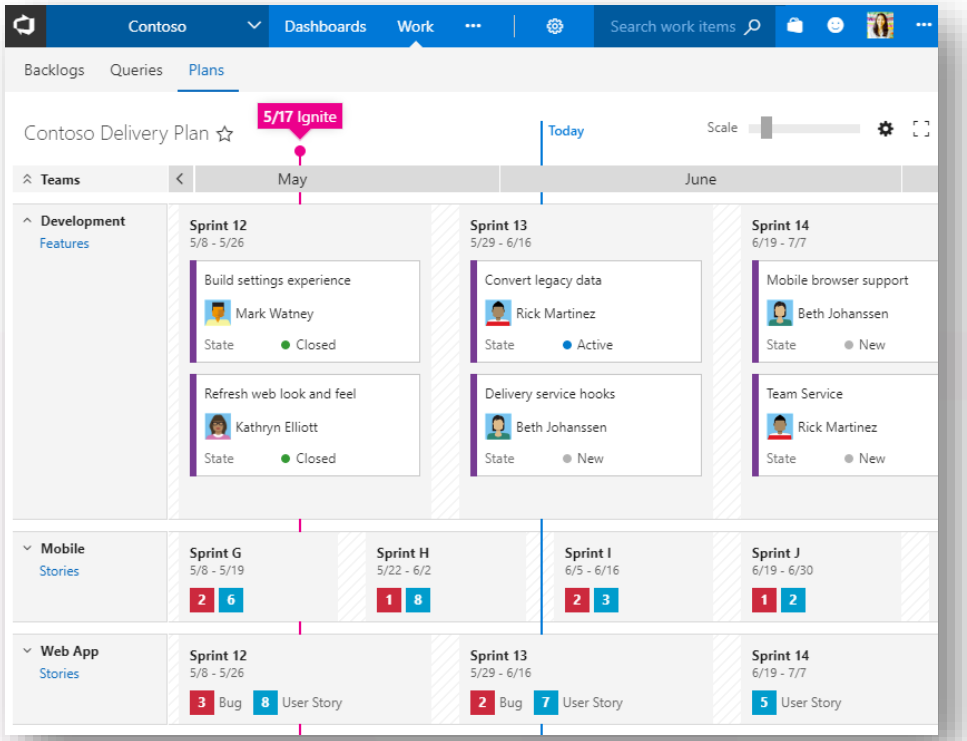
Delivery Plans

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

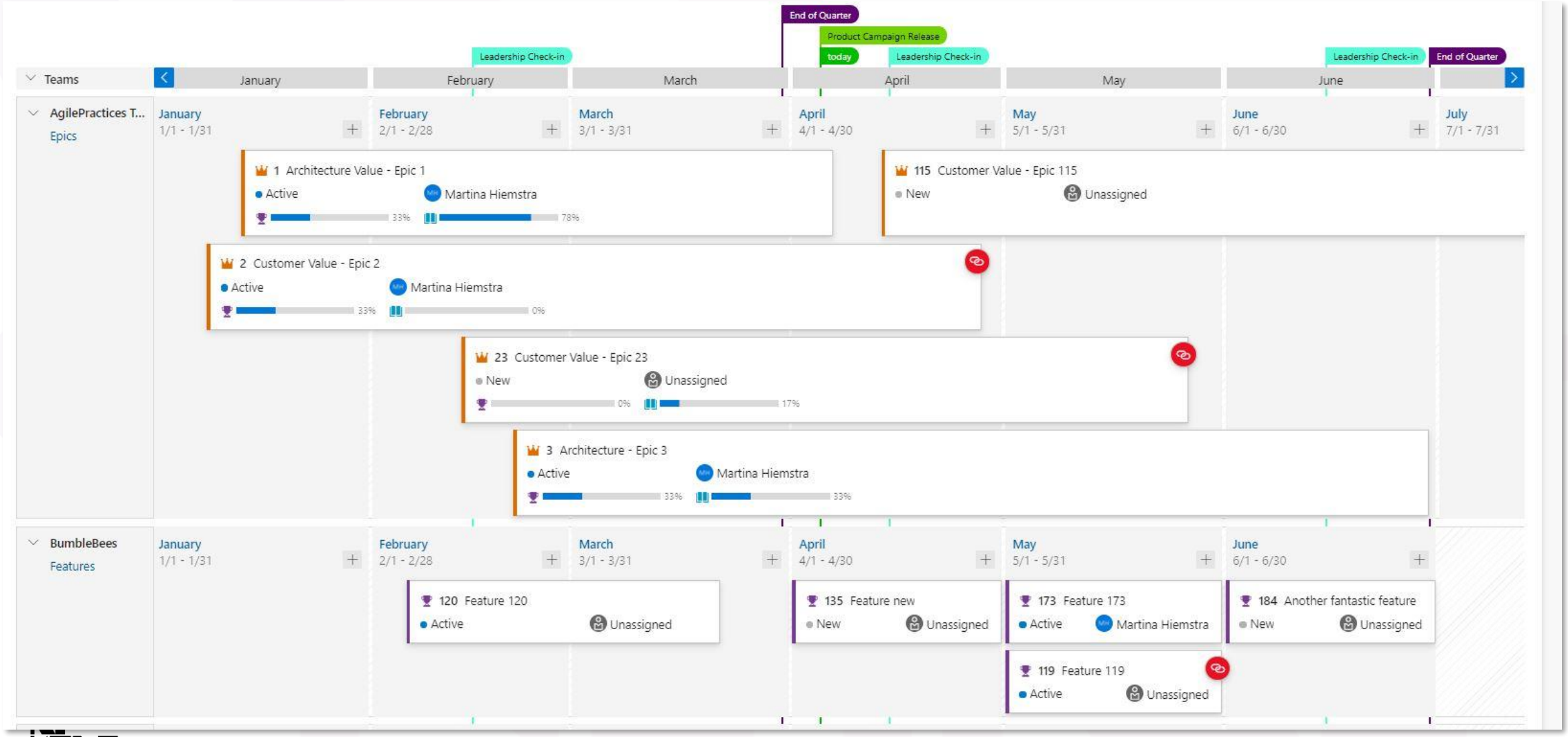
Balance work between sprints

Visualize, identify and resolve any resource bottlenecks and conflicts

Facilitate release planning with milestones

Visualize and identify dependencies

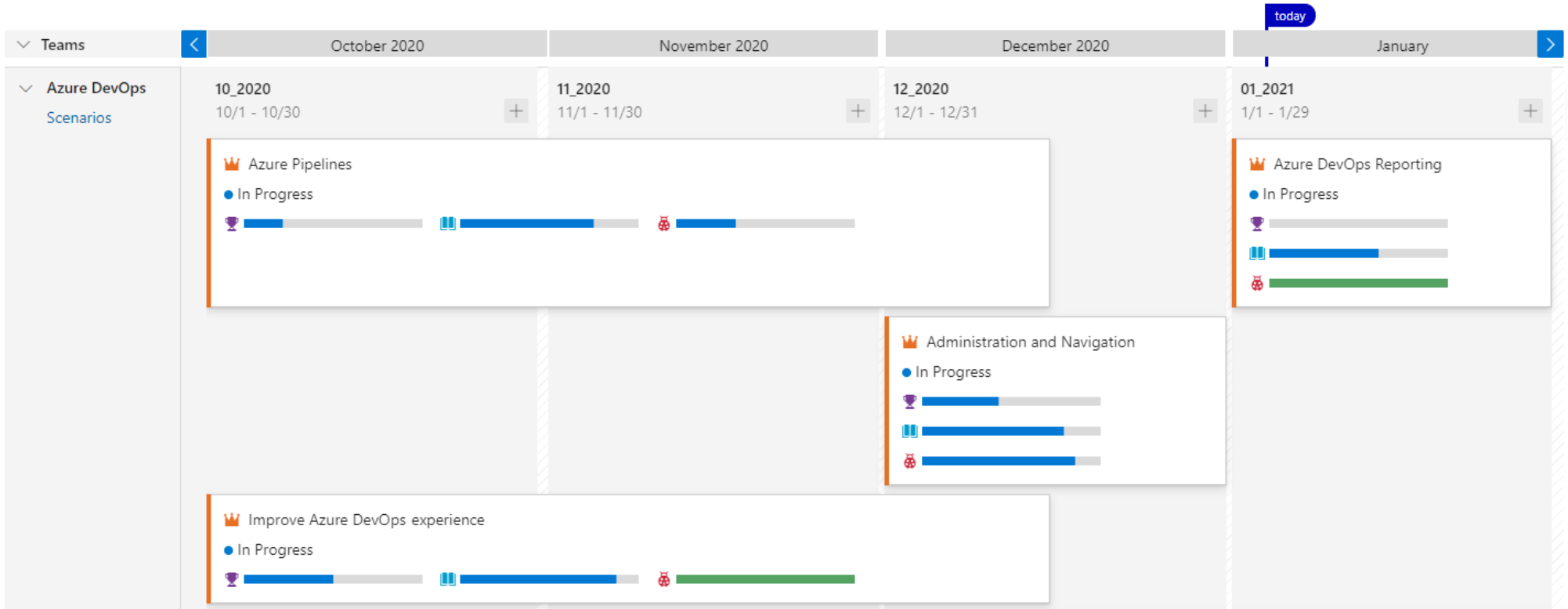
Delivery Plans



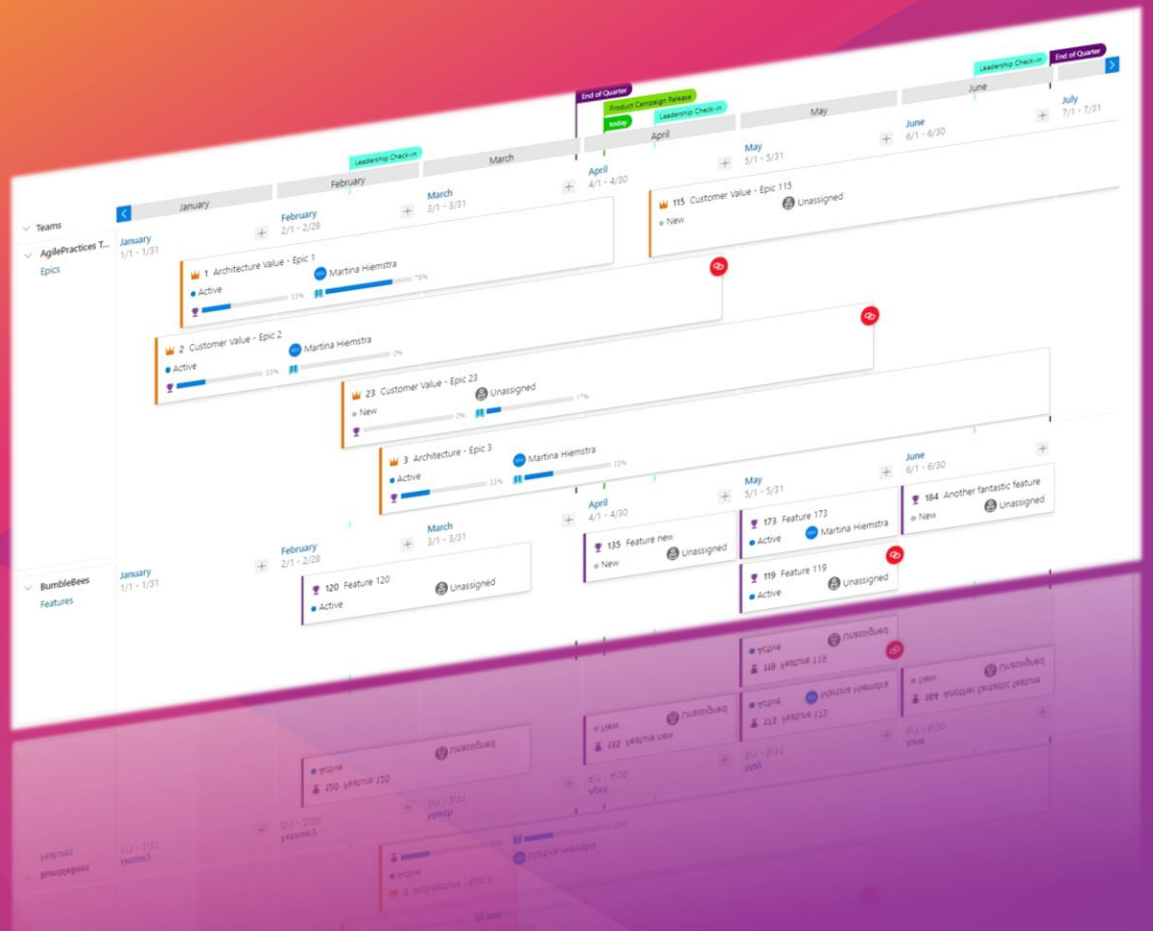
Delivery Plans and PPB Higher Levels

Items spanning one or more sprints

Rollup of features and epics

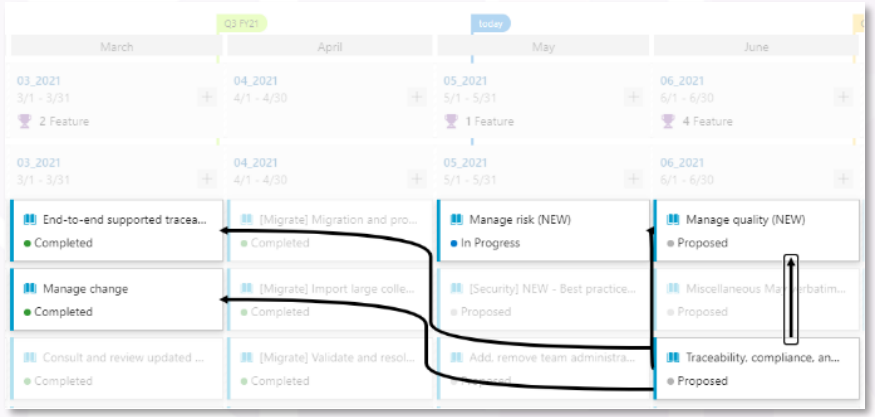


DEMO
Setting up Delivery Plans
Multiple Teams
Milestones
Styles
Collapsed View - Summary Info Rollup

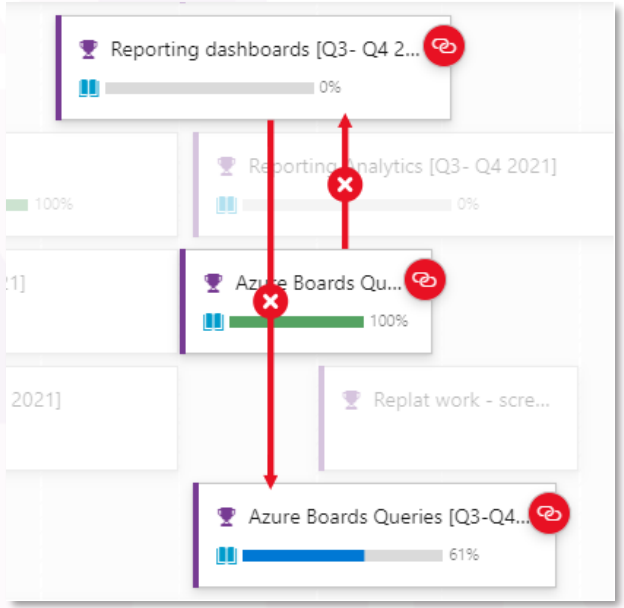


Track Dependencies by Using Delivery Plans

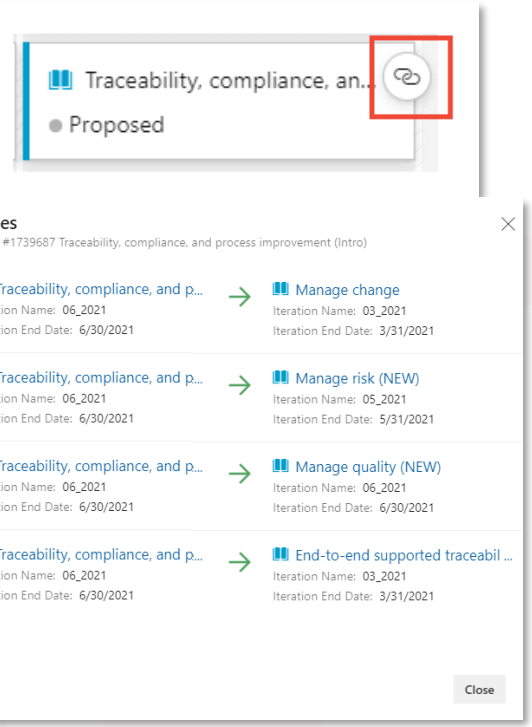
Show Dependencies based on Predecessor / Successor link type between work items.



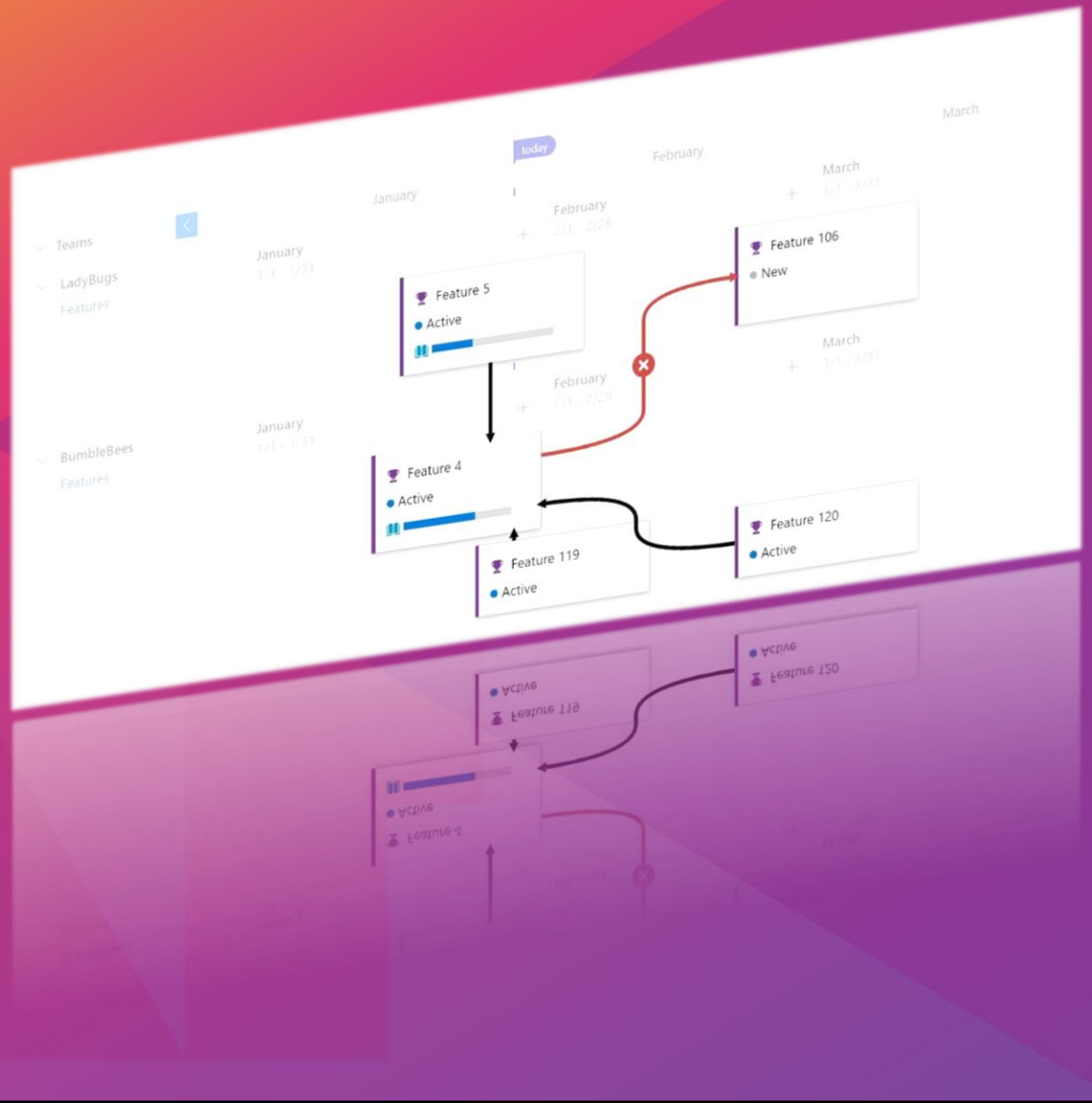
Issues shown as red lines
Issue: successor scheduled to end **before** than the predecessor is completed



Dependency Summary



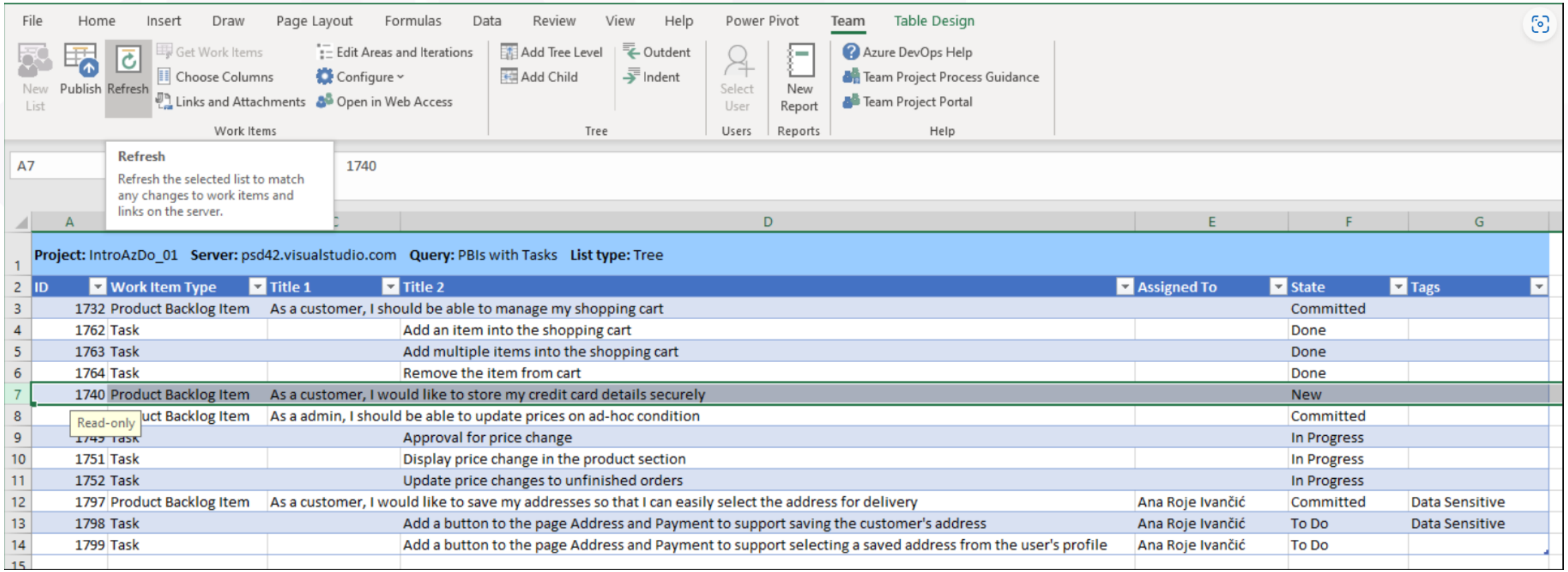
DEMO
Track Dependencies



Highlight: Excel Integration

Useful for offline distribution

Retrieve and keep lists in sync + bulk add/edit



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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Unleashing Agile Transformation: A Scrum and Azure DevOps Approach