

# Portfolio Alignment Process

## ***Purpose***

The current method for aligning teams has several deficiencies. Milestone plans have a tendency to be difficult to view in a holistic manner and results in reactive rather than proactive adjustments. To achieve a more incremental, adaptive and proactive alignment process we are suggesting several alterations to the current process.

- Combine status and planning meetings into a single meeting and process.
- Reduce dependence on percent complete by implementing integration milestones that are testable in the IT environment.
- Track progress on releases by tracking based on “Feature Streams” of customer facing features.

The portfolio alignment wall (PAW) will allow teams working toward a combined release to visualize progress and dependencies. Cards on this wall will represent the work that teams need to do to meet the targeted feature releases. Cards will be marked done when the code is deployed to the shared IT environment and verifiably integrated with other code from other interdependent teams. This wall will track integration points in “Iterations” even though many of the teams represented on the wall will not be working in an iterative manner. This will create an environment where milestones are either verifiably “Done” or not. Cards that are not “Done” must be moved on to the next iteration.

## ***Process***

Move all status meetings to a consolidated Iteration Planning meeting. This meeting will be utilized to track cards that are “Done” from the previous iteration and will be used to proactively adjust the plan moving forward. This process of only counting work that is done and integrated will increase the view of the value stream as the integration and deployment of the features rather than individual team progress.

Agile Governance Team (Every 2 Weeks aligned with the IAM/CAM Iteration Schedule)

- Review Previous Progress for all teams
- Set Integrated Goal
- Plan Integration Cards for next iteration

15 Minute Standup Meeting (Two or Three Times Weekly)

This standup focuses on the goals of the current iteration

- What did the team get “Done” since last Stand Up
- What is the team working on Now
- Are there any roadblocks standing in the way of team progress

The portfolio alignment wall (PAW) will allow teams working toward a combined release to visualize progress and dependencies. Cards on this wall will represent the work that teams need to do to meet the targeted feature releases. Cards will be marked



## **Key to Card Wall**

Neon Green Card – Release card that represents the release of code into the final release pipeline.

Neon Yellow Card – Release card that represents the release of code into the release pipeline for Limited or No public access.

Colored Cards – Represent the work done by a team. This should be mid level milestones with verifiable acceptance criteria. Cards are segregated by color by project within a team.

Team Responsible – Indicated on each card by a colored sticker allowing teams to quickly scan the wall for the work that they are responsible.

Red Check Mark on Card – Represents that that cards acceptance criteria have been validated.

Green Sticky on Card – Card is in progress and on track for completion during the iteration.

Yellow Sticky on Card – Card is at risk for not completing during this iteration.

Red Sticky on Card – Card will not complete during this iteration or has a roadblock that must be resolved.

No Sticky or Checkmark on Card – Work has not started on this card.

## ***Rollout Strategy***

Adoption of this process will require several changes from current processes and tools and consequently will need to be managed to ensure success. A phased approach would probably reduce the impact and allow the process to be tuned. Several things need to be completed to begin piloting the process:

- Identify the first group to work with
- Identify the Release Product Owner
- Identify Scrum Master for that process
- Have a Kickoff meeting with the group



# Agile Portfolio Management Process

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The current method for aligning teams has several challenges

- Long term plans have a tendency to be difficult to view in a holistic manner and results in reactive rather than proactive adjustments
- Teams are experiencing uneven demand
- Increasing works in progress (WIP) has been causing thrash rather than a tuned incremental delivery



## Basic Approach

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- Create a Portfolio Steering Committee to prioritize and manage demand
- Track progress on releases by tracking based on “Feature Streams” of customer facing features on each teams Portfolio Alignment Wall (PAW)
- Reduce dependence on percent complete by implementing integration milestones that are testable in the IT environment.
- Engage Stakeholders



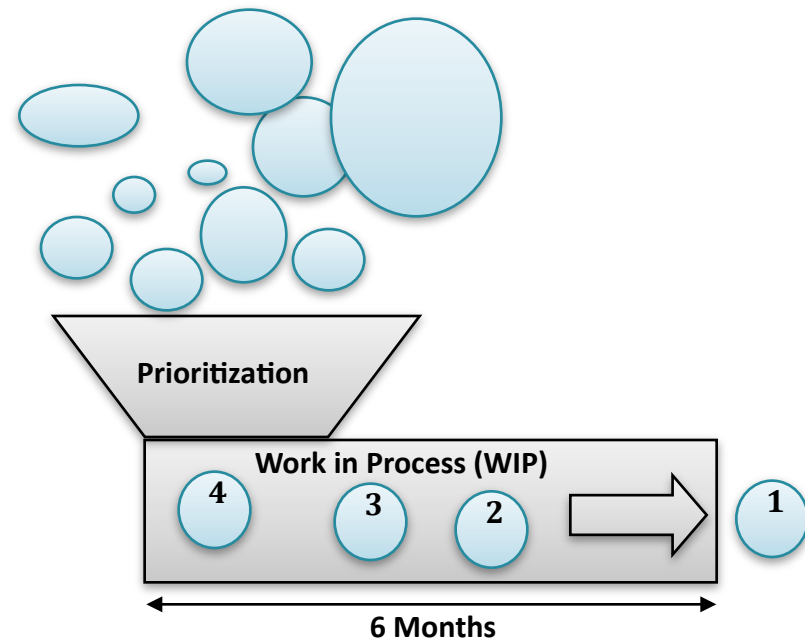
## Portfolio Steering Committee - Goals

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- Increase Stakeholder Participation
- Move toward a more explicit prioritization model by keeping Authority for prioritization In the Portfolio Steering Committee
- Move toward managing flow rather than managing to a plan – Embrace Uncertainty
- Reduce WIP for teams by managing demand and bundling work
- Integrate view of portfolio across department
- Increase Transparency
- Remove Roadblocks for teams

# Portfolio Realignment

- **Terminate** sick projects
- **Split** large projects in smaller ones
- **Prioritize** projects by business value, at least within business unit
- **Limit** delivery timeframe to months
- **Re-prioritize** projects regularly



$$\text{Cycle Time} = \frac{\text{WIP}}{\text{Completion Rate}}$$



## PAW Goals

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- Provide transparency by making work visible as more is learned and discussing it regularly.
- Provide transparency by making priorities and capacity visible and discussing those regularly.
- Facilitate collaboration and cooperation between and outside of lines.
- Never longer than allotted time.





## PAW is Not

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- Not just the wall. It's the conversation guided by the wall.
- Not a mechanism to solve most problems (better at helping to identify problems). Identified problems are more likely to be assigned for separate targeted discussion / resolution.
- Not a good meeting to take hostage. Utilize "focus conversations" to occur after.



# PAW Attendees

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- Mandatory

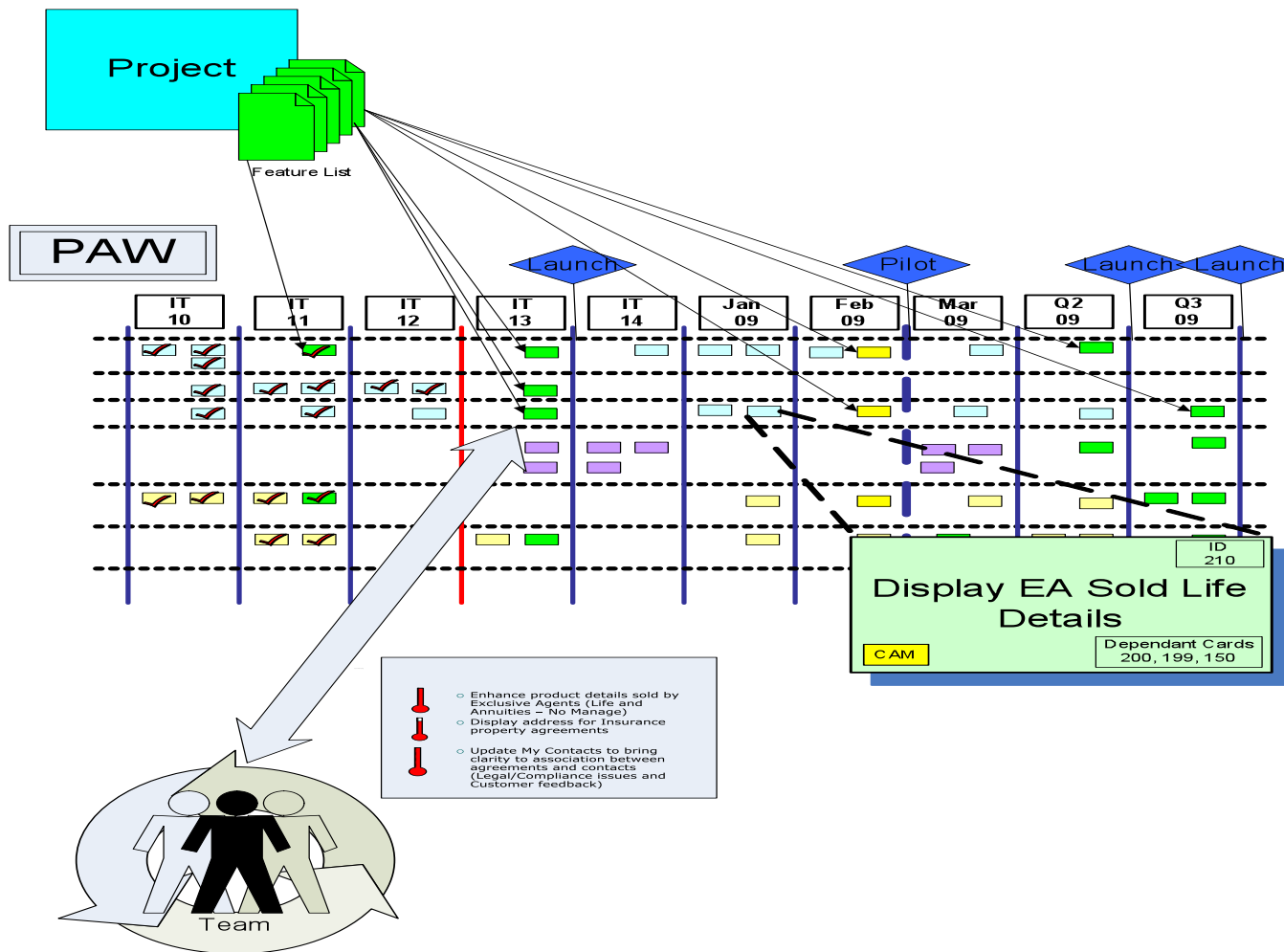
- 2 - 4 representatives from each line, selected by the line, for a duration chosen by the line
  - Responsible to act as linking pins between the line and the PAW
- Project Manager(s)
- Major Dependency Representatives

- Helps to have

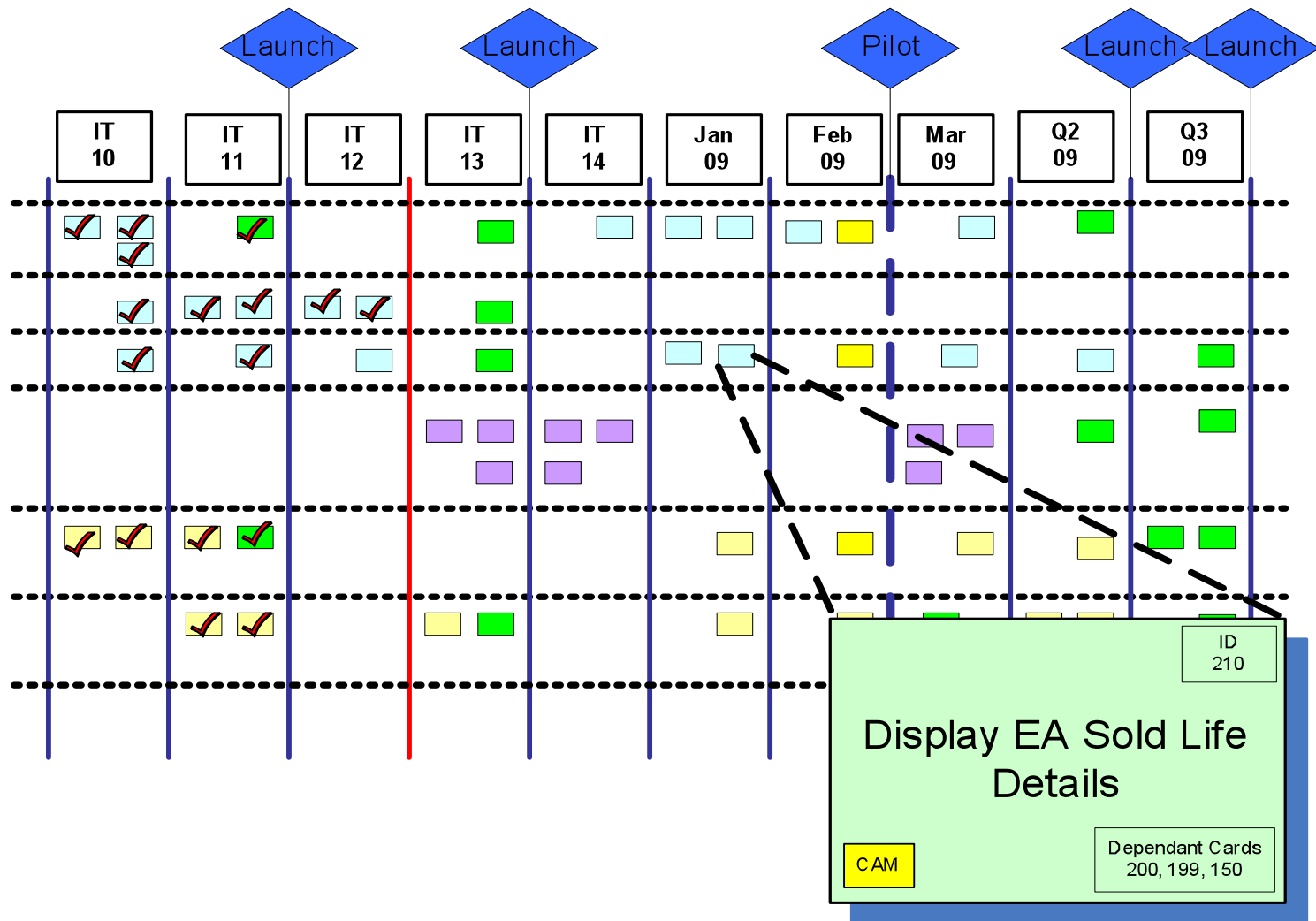
- Troika
- Minor Dependency Representatives (especially IPMs)

- **Important that attendees are there in person**

# Feature Based Reporting



# Portfolio Alignment Wall





# Standup Meeting

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- Each Team
  - Reviews Progress on cards in this iteration
    - Identify cards that are done
    - Identify roadblocks or dependancies
- Announcements
- Review Roadblocks and Risk List
- Identify Follow-Up discussions



## What “Done” Means on PAW

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- Cards should represent functionality and dependencies for teams
- Functionality is deployed in an environment where other teams have access to test the dependency