



Agile Portfolio Management

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My Background



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Objective

Agenda

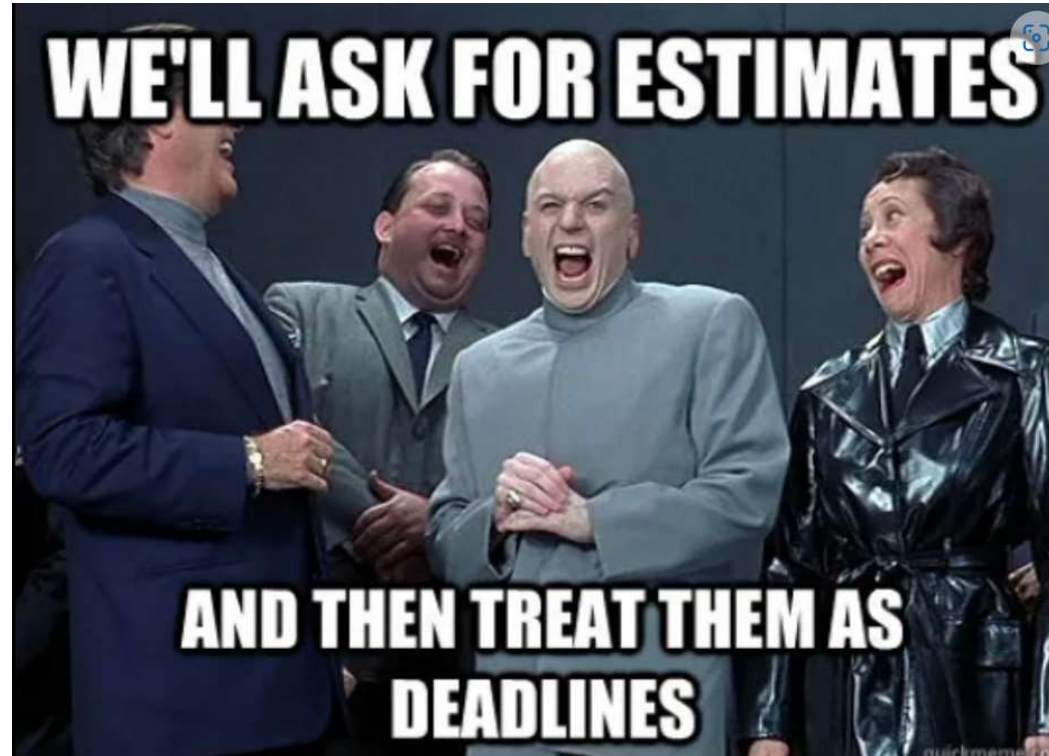
- Define the problem
- Talk through how we approach portfolio management
- Show some examples
- Have a discussion

Goals

- Help me work through this
- Provide ideas for your programs/teams
- Learn how other organizations have solved this



Problem Statement



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Problem Statement

Organizational Leaders



Middle Management



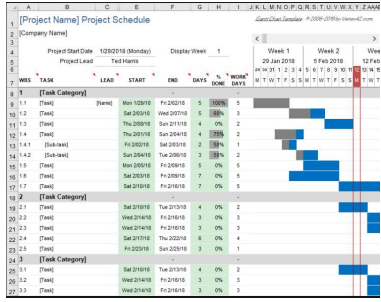
Product Teams



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Problem Statement

Organizational Leaders

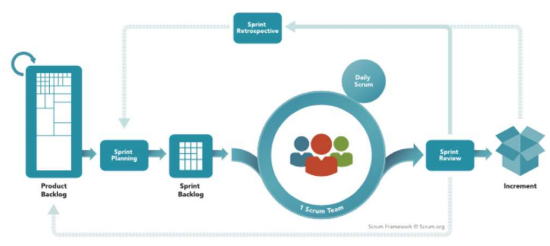


Middle Management



Product Teams

SCRUM FRAMEWORK

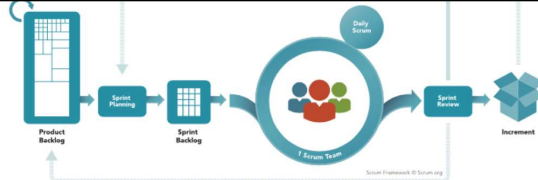
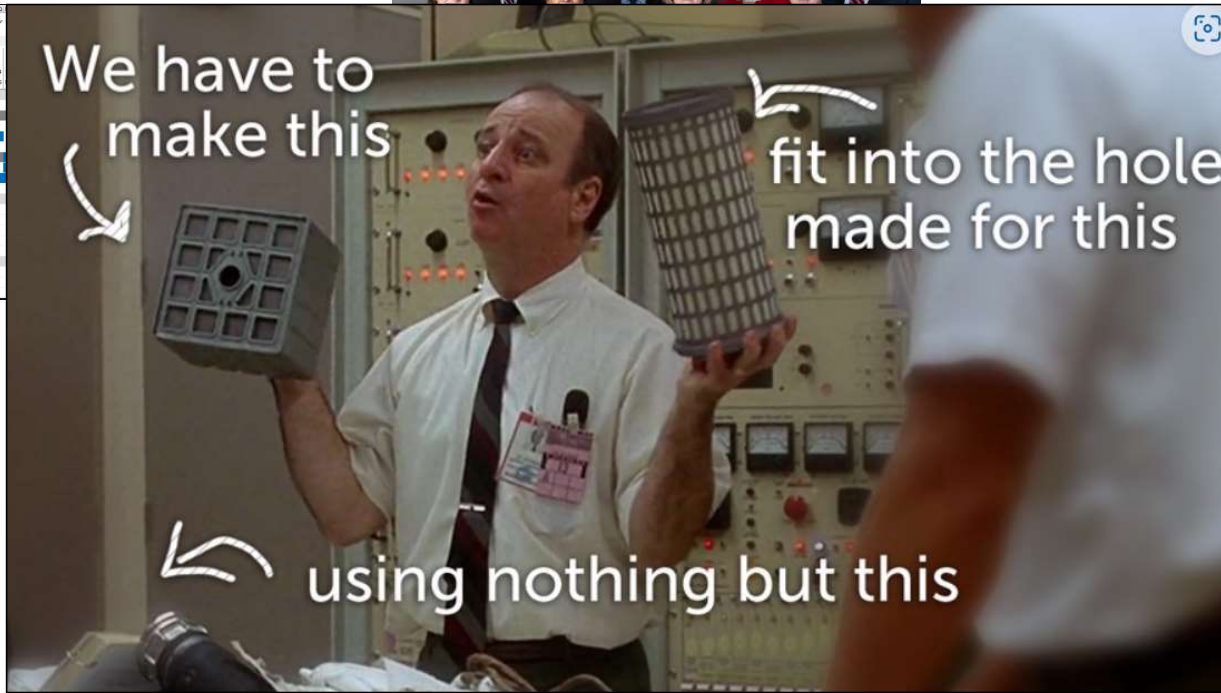


Problem Statement

Organizational Leaders

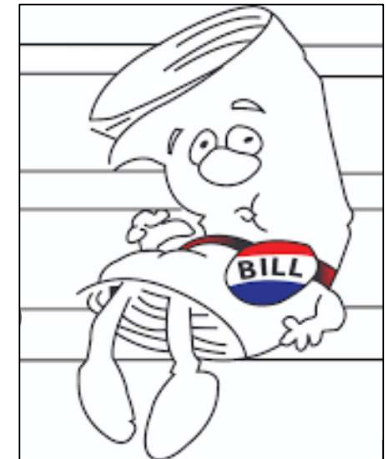


WEEK	DATE	LEAD	START	END	DAYS	% DONE	WORK DAYS
[Task Category]							
1.1	[Task]	[Task]	Mon 10/21/18	Fri 10/25/18	5	100%	5
1.2	[Task]	[Task]	Sat 10/26/18	Sun 10/27/18	2	100%	2
1.3	[Task]	[Task]	Tue 10/29/18	Wed 10/30/18	2	100%	2
1.4	[Task]	[Task]	Thu 10/31/18	Fri 11/01/18	2	100%	2
1.4.1	[Sub-task]	[Task]	Sat 10/26/18	Sun 10/27/18	2	100%	2
1.4.2	[Sub-task]	[Task]	Mon 10/29/18	Tue 10/30/18	2	100%	2
1.5	[Task]	[Task]	Mon 10/29/18	Fri 11/02/18	4	100%	4
1.6	[Task]	[Task]	Sat 10/26/18	Fri 11/02/18	7	100%	7
1.7	[Task]	[Task]	Sat 10/26/18	Fri 11/02/18	7	100%	7
[Task Category]							
2.1	[Task]	[Task]	Sat 10/26/18	Tue 10/30/18	4	100%	4
2.2	[Task]	[Task]	Wed 10/30/18	Fri 11/02/18	3	100%	3
2.3	[Task]	[Task]	Wed 10/30/18	Fri 11/02/18	3	100%	3
2.4	[Task]	[Task]	Sat 10/26/18	Tue 10/30/18	4	100%	4
2.5	[Task]	[Task]	Fri 10/25/18	Sun 10/27/18	3	100%	3
[Task Category]							
3.1	[Task]	[Task]	Tue 10/30/18	Thu 11/01/18	3	100%	3
3.2	[Task]	[Task]	Wed 10/30/18	Fri 11/02/18	3	100%	3
3.3	[Task]	[Task]	Wed 10/30/18	Fri 11/02/18	3	100%	3



Form100 Approach

- Not just an Agile / Team problem – how does value flow through the system?
- Organizational context and relationships
- Focus on Alignment, Communication, & Process
- MVP – Minimum Viable Process



High Agility
Low Constraints



Low Agility
High Constraints



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Form100 Approach

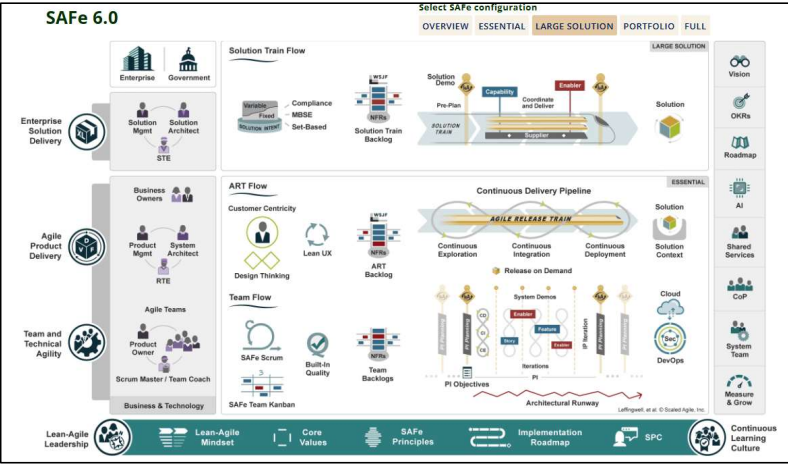
- Map the current process from Idea to Done
- Backlog organization and parenting
- Team agile practices – predictability
- Product Management Process
- Portfolio Organization
- Visibility and Reporting



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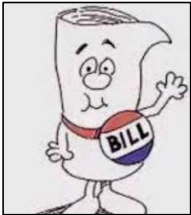
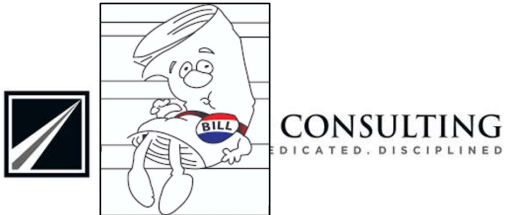
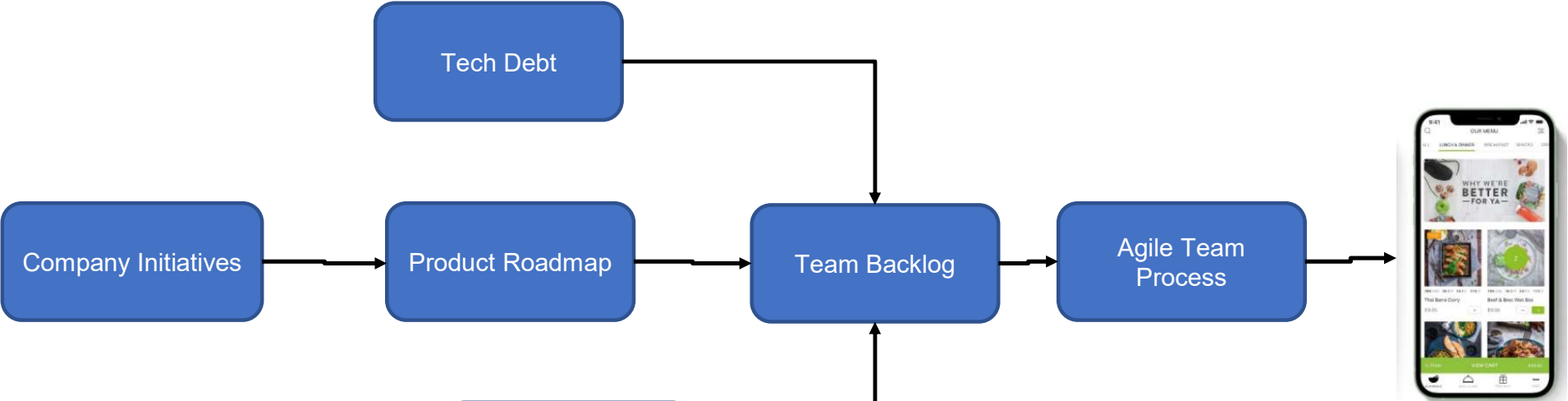
Form100 Approach

- Map the current process from Idea to Done
 - Backlog organization and parenting
 - Team agile practices – predictability
 - Product Management Process
 - Portfolio Organization
 - Visibility and Reporting
-
- Strategically Aligned Feature Execution – or SAFE



Form100 Approach

- Map the Current Process
 - How does value currently flow through the system?



Form100 Approach

- Backlog Organization and Parenting - ADO
 - Start by putting everything into Features
 - User Stories and Bugs
 - Batch sizing – smaller is better
 - Slice by value
 - Tech debt & small enhancements: Use Buckets
 - YAGNI!

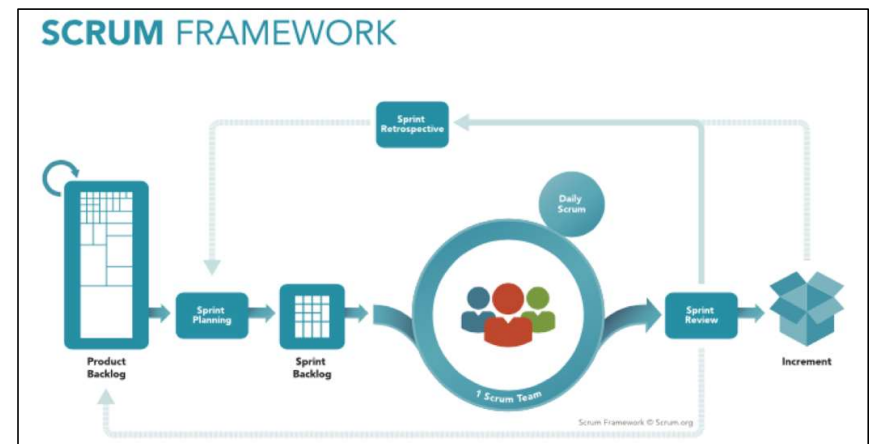
- Get to an 80% Solution!

	User Story	📄 Create temporal master item	● New
23	Feature	📄 Connect MO Sellout Customers to Copernicus	● New
	User Story	📄 Connect Customer to Copernicus: Benavides	● New
	User Story	📄 Connect Customer to Copernicus: Cheduraui	● New
	User Story	📄 Connect Customer to Copernicus: CityClub	● New
	User Story	📄 Connect Customer to Copernicus: Fresko	● New
	User Story	📄 Connect Customer to Copernicus: Costco	● New
	User Story	📄 Connect Customer to Copernicus: Futurama	● New
	User Story	📄 Connect Customer to Copernicus: HEB	● New
	User Story	📄 Connect Customer to Copernicus: Mayoreo	● New
	User Story	📄 Connect Customer to Copernicus: OXXO	● New
	User Story	📄 Connect Customer to Copernicus: Sams	● New
	User Story	📄 Connect Customer to Copernicus: Sigma	● New
	User Story	📄 Connect Customer to Copernicus: Soriana	● New
24	Feature	📄 Build MO Sell Out Alerts	● New
	User Story	📄 Create Alert for a Single Customer	● New
	User Story	📄 Copy Alert to other customers	● New
	User Story	📄 Validate and train customers on alerts	● New
25	Feature	📄 International P&L	● Active
	Bug	🐛 Total USD are not matching (2022)	● Active
26	Feature	📄 India Sales & Stock	● Active
27	Feature	📄 AEMEA Net Sales	● New
	User Story	📄 Create Workflow to load monthly data	● Active
28	Feature	📄 Operationalize Forecasting Models	● Active

Form100 Approach

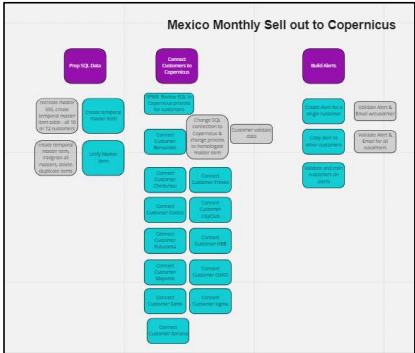
- Team Agile Practices – predictability
 - Sprints: Develop on Cadence, Release on Demand
 - Story points and velocity
 - User Stories and Cycle Time

- Need to be predictable at the Story Level



Form100 Approach

- Product Management Process – Ready to Work
 - Product Canvas – define the problem
 - Story Mapping – get to MVP
 - T-Shirt Size: Sprints not story points
 - Alignment & Communication
- Apple to Apples for prioritization



<p>Problem Statement</p> <ul style="list-style-type: none"> • What problem are we trying to solve? 	<p>Supporting Data</p> <ul style="list-style-type: none"> • Is this <u>actually</u> a problem worth solving • Data behind how often the scenario happens • Business Cost or Revenue Opportunity 	<p>Success Statement</p> <ul style="list-style-type: none"> • If we solved this problem, what would we expect to see • How would we know we are successful • What are the success metrics use to verify 	<p>Data Sources</p> <ul style="list-style-type: none"> • List all the data sources that will be used in the proposed solution (what APIs or <u>third party</u> systems?) • List all the data sources that will be updated 	<p>External Teams</p> <ul style="list-style-type: none"> • Which teams are required for the solution? • Which teams will this solution affect?
<p>Targeted Persona</p> <ul style="list-style-type: none"> • Which agents and in what scenarios are experiencing the problem 	<p>Assumptions</p> <ul style="list-style-type: none"> • What key assumptions to we have for this solution 	<p>Unknowns / Risks</p> <ul style="list-style-type: none"> • What unknowns need to be researched • What risks do we have to the new Feature 	<p>In Scope</p> <ul style="list-style-type: none"> • What functionality and scenarios are in-scope for the MVP solution 	<p>Out of Scope</p> <ul style="list-style-type: none"> • What functionality and scenarios are out of scope for the MVP solution

Form100 Approach

- Portfolio Organization - ADO
 - Epics = Roadmap Items
 - Parent Features to Epics
 - Stories = Team Execution

- Tie team execution to Product Roadmap
 - Use the process for visibility and predictability

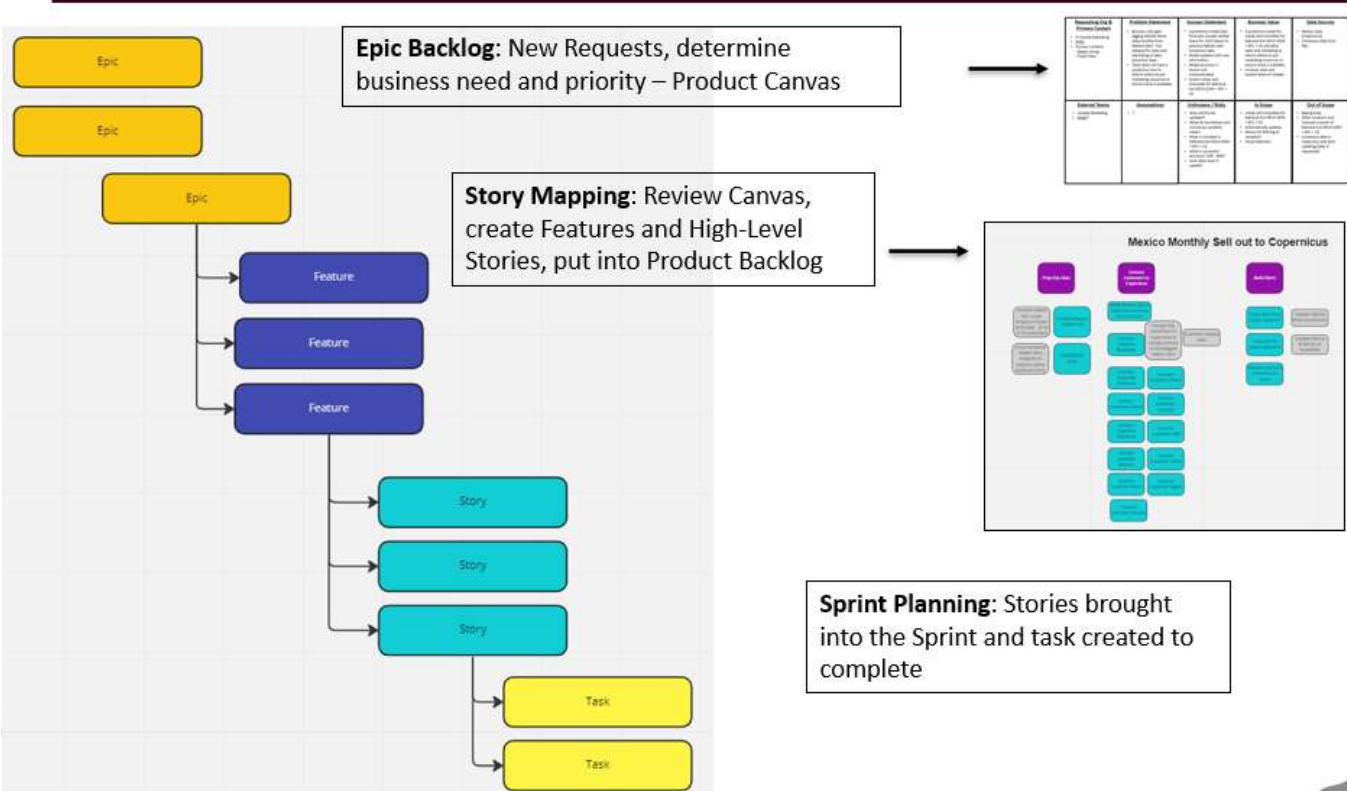
1	7888	Epic	Operationalize Forecast Models	Active
	8087	Feature	Operationalize Forecasting Models	Active
	8153	User Story	Set up a database with table structure	Active
	8155	User Story	Modify R Script	Active
	8156	User Story	Define Output tables	Active
	8157	User Story	Create notifications and alerts (maybe)	New
2	7217	Epic	Brazil Sourcing PPV Dashboard	Active
	8127	Feature	development planning	Active
	8236	User Story	Spike: Technical design of the solution	Active
	8237	User Story	Spike: Backlog creation	New
3	7963	Epic	AEMEA Market Share process Automation	Active
	8216	Feature	MS Automation	Active
	8218	User Story	Create trigger- Market Share	Active
	8219	User Story	Test trigger- Market Share	New
	8220	User Story	Create alerts- Market Share	New
	8221	User Story	Test alerts- Market Share	New
	8217	Feature	Supply Chain Automation	New
	8231	User Story	Create trigger - Supply Chain	New
	8232	User Story	test trigger - Supply Chain	New
	8233	User Story	create alerts - Supply Chain	New
	8234	User Story	test alerts - Supply Chain	New
	8235	User Story	Technical Documentation	New



Form100 Approach

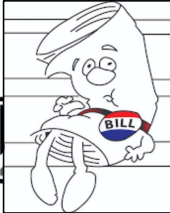
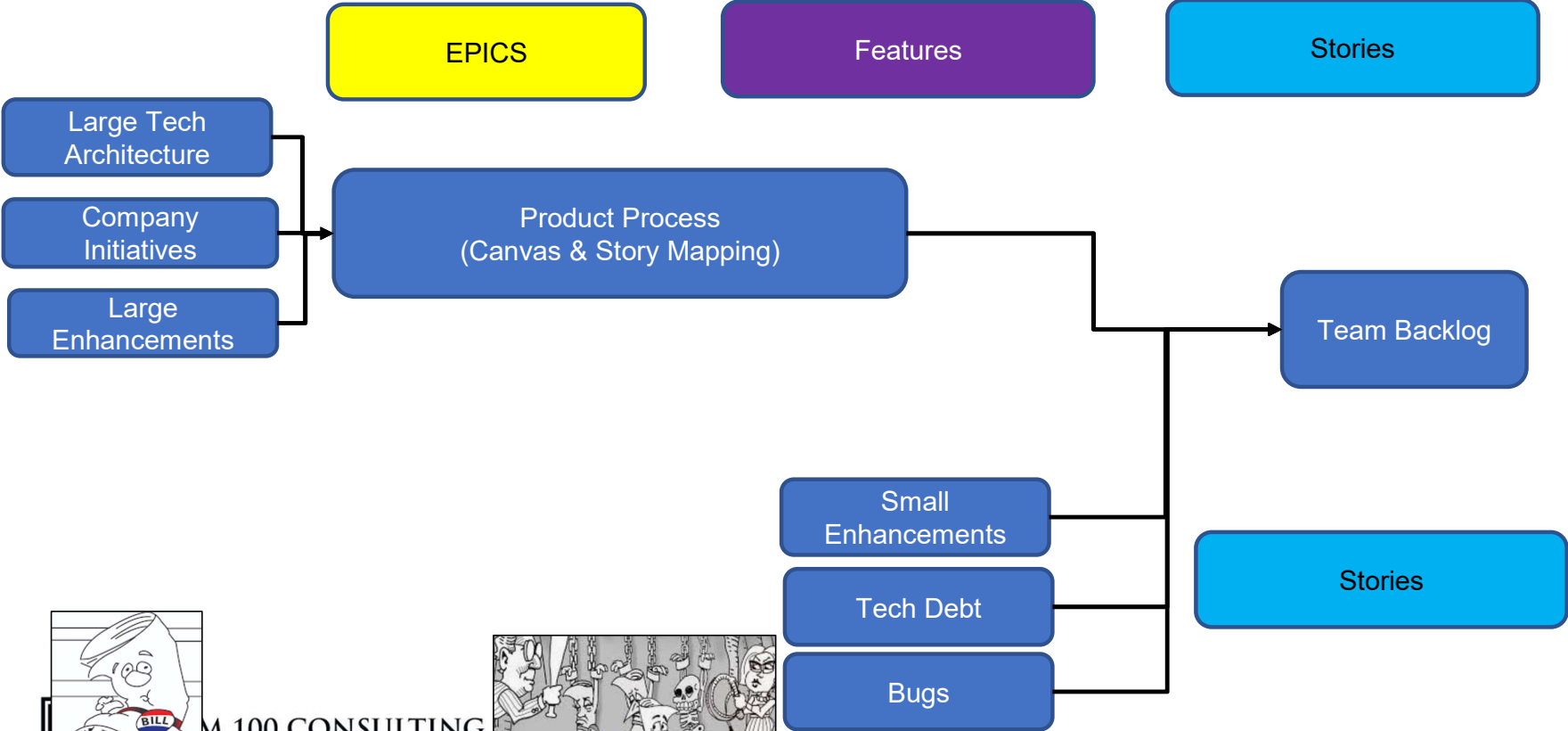
- Portfolio Organization – Process

Portfolio: Epics / Feature / Stories

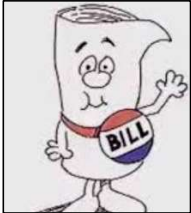


Form100 Approach

- Portfolio Organization – Process



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Azure Dev Ops Visibility and Reporting

- Visibility and Reporting
 - Epic Backlog = Roadmap
 - Progress Bar

The screenshot shows the Azure DevOps Backlog view. At the top, there are navigation tabs: Backlog, Analytics, Epic/Feature Timeline, and a '+ New Work Item' button. A 'View as Board' button is highlighted with a red box. To the right of this button are 'Column Options' and a three-dot menu. Below the navigation is a table of work items. The table has columns for Order, Work Item Type, Title, State, and Progress by all Work ... St. The progress bars are represented by blue and grey segments, with the percentage completion shown to the right of each bar.

Order	Work Item Type	Title	State	Progress by all Work ... St.
1	Epic	> Data Vis: ABVP & CSM Dashboards	Active	92%
2	Epic	> Sourcing Analytics - PPV	Active	85%
3	Epic	> DMS: Copernicus Integration - KSA	Active	77%
4	Epic	> Operationalize Forecast Models	Active	50%
5	Epic	> PoS: Copernicus Integration	Active	46%
6	Epic	> REX: Automating SO data to Salesforce	Active	43%
7	Epic	> Data Vis: Monthly Debrief Reports	Active	34%
8	Epic	> TPM: Support PwC ETLs	Active	95%
9	Epic	> Brazil Sourcing PPV Dashboard	Active	25%
10	Epic	> AEMEA Market Share process Automation	Active	15%
11	Epic	> TPM Reporting	Active	30%
12	Epic	> Copernicus Governance	Active	47%
13	Epic	> Migirate weekly Sell Out to Copernicus	New	75%
14	Epic	> Active Product Support	Active	73%
15	Epic	> CI-CD	Active	57%



Azure Dev Ops Visibility and Reporting

- Visibility and Reporting
 - Epic Kanban

The screenshot displays an Azure DevOps Epic Kanban board. At the top, there are navigation tabs: "Board", "Analytics", "Epic/Feature Timeline", and "View as Backlog". On the right side, there are utility icons for "Epics", filters, and settings. The main board area is divided into columns representing different stages of work:

- New**: Contains three work items:
 - 4908 Migrate weekly Sell Out to Copernicus (State: New, Mexico)
 - 8179 International Supply Chain KPI dashboard (State: New)
 - 3602 WTR Forecasting Automation (State: New, International)
- Ready to Map**: Contains one work item:
 - 8246 Canada Market Share Model phase 2 (State: New, Canada, Market Share)
- Story Map Done**: Empty column.
- In-Work**: Contains two work items:
 - 5606 Data Vis: ABVP & CSM Dashboards (State: Active, Francisco Perez, Canada, DataVis)
 - 3597 Sourcing Analytics - PPV (State: Active, Hepziphia S)
- Resolved**: Contains one work item:
 - 7796 India Finance Migration (State: Closed, Jason Canelos, GOVERNANCE)
- Closed**: Contains one work item:
 - 5872 Market Share Model Canada (Phase 1) (State: Closed, Victor Jesus de Ita)

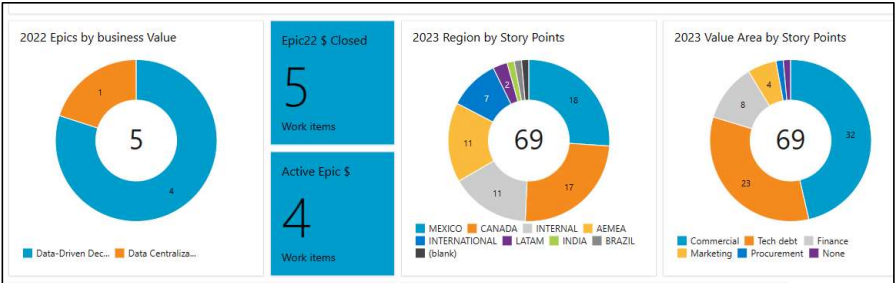
A red box highlights the "Ready to Map" and "In-Work" columns, indicating the current focus of the team.



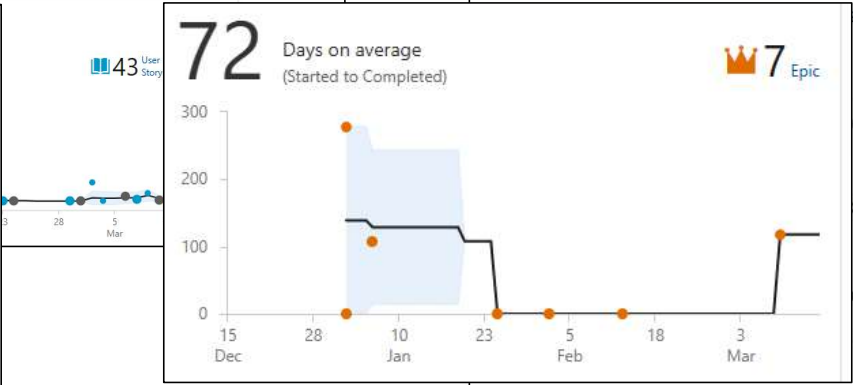
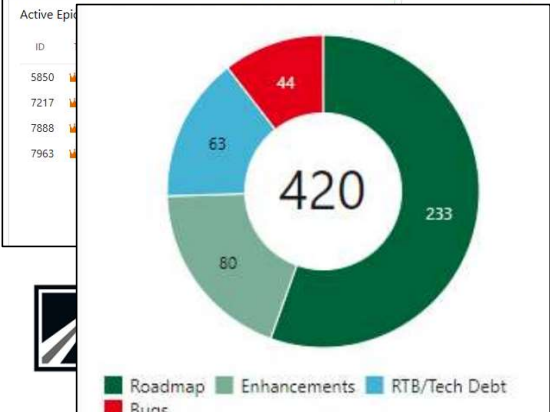
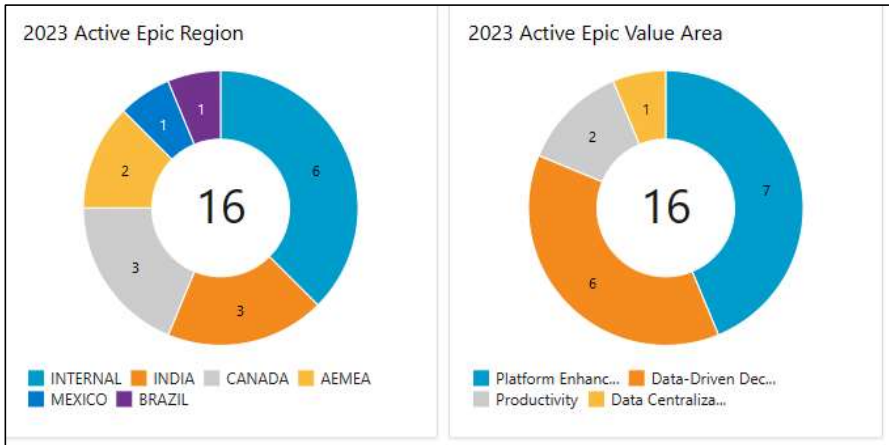
Azure Dev Ops Visibility and Reporting

- Visibility and Reporting
 - Dashboards & Widgets
 - Team Allocation
 - Epic Cycle Time

Team Agile Dashboard



Leadership Dashboard



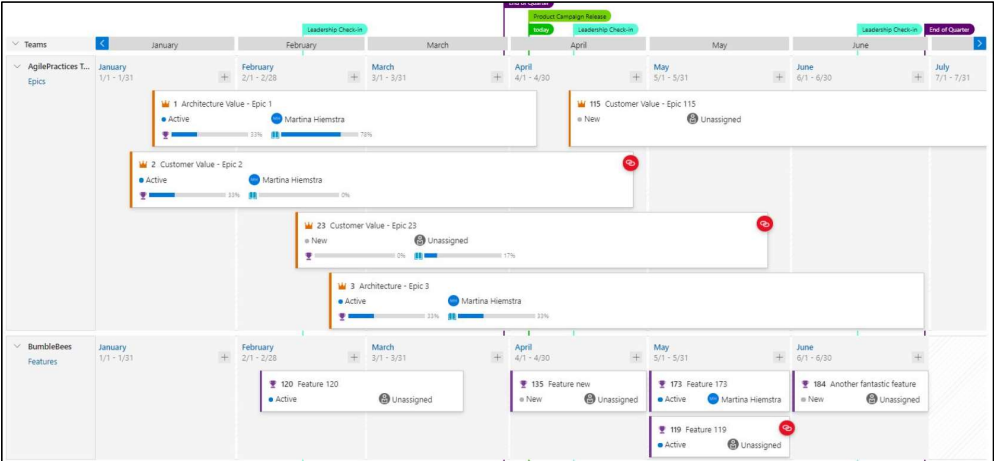
ate) - (16)

Location	Business Owner
CANADA	Sheema Khan
INDIA	Aravinda Nagaraj
USA	Brenda Hernandez
INDIA	Renatta Espinosa
Automation	Marian Guiling
INTERNAL	
INDIA	Renatta Espinosa

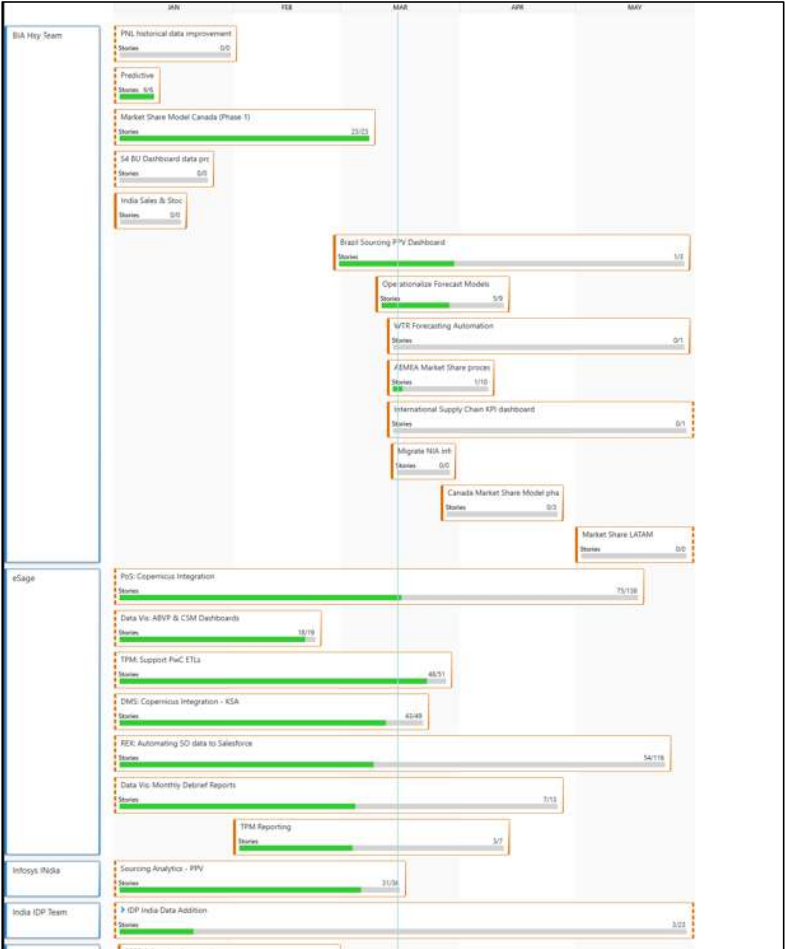
Azure Dev Ops Visibility and Reporting

- Visibility and Reporting
 - Roadmaps

Azure Delivery Plans



Portfolio++



Final Thoughts

- We are weather forecasters – provide probabilities
 - Show your work!
- Every organization, product, and team are different
- Can't start at the finish line – need the foundation first
- Stay organized and disciplined in Agile practices
 - Backlog organization is key
- Lower the water level



Final Thoughts

- Questions, comments...what worked for you?



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