PSR Prioritization Process

Documentation for Understanding and Alignment

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To help us all align in upcoming quarters, I hope this outline of the process that I have developed and we have evolved over the years for reviewing PSRs and prioritizing them for regular releases will be helpful. The material is organized in three sections of increasing detail:

1. The Phases and their Goals/Outcomes
2. A Flow Chart of the Process
3. A Detailed Outline of the Process and Rationale

The Phases and their Goals/Outcomes

Phase 1 – PSR Preparation

This actually goes on all the time – it is the PSR equivalent to "Always Be Grooming" user stories in JIRA. But as we approach each new quarter, this phase becomes more focused. Each Requester with PSRs that need to be considered for the upcoming quarter should try to be ready for the 1-1- conversations that will be scheduled during pre-planning. Outcomes include:

- PSRs well defined, good requirements, strong business value statement.
- Planned Client Release field is set to the quarter release the work is wanted.
- Stack-Rank of requester's PSRs individually for the quarter.

Phase 2 – PSR Review and Collaboration

This phase begins the collaboration between myself and requesters with PSRs needing to be considered for a given release. I set up one-on-one meetings with everyone who has a PSR in the backlog marked as needed in the upcoming quarter. This work happens during the pre-planning timeframes established by PMO. Outcomes include:

- The requester and I come to an understanding of the business need and value of the PSR and its relevance to tactical and strategic priorities so I can guide my teams on how the work fits into the current cycle but also its relevance for the longer term.
- Agreement on the state of requirements, acceptance criteria and user experience/flow. If the documentation of the PSR is inadequate I will work with the requester to ensure we have enough for the teams to provide high level sizing.
- Agreement about setting the "Business Priority" to High, Medium or Low. This provides the filter of what PSRs will first be sized by the Service teams.

Phase 3 – Consolidation and Prioritization

In this phase I combine extracts from all PSRs under consideration for the quarter into a planning workbook and prepare the information that will give each team a list to begin sizing. This work goes on near the end of the pre-planning cycle, with the intent to be done by the time the formal planning cycle begins. Outcomes include:

- A master list of all PSRs under consideration, sorted and filtered by Business Priority (High, Medium, Low).
- A main Service identified for each PSR, which will be the team asked to take a first look to attempt a high-level size. I also work with the teams to identify if any other Services will be required to do work.
- Separate tabs for each team in the workbook, with the list for each of the "High" Business Priority PSRs, stack-ranked to fit with leadership-identified business goals and strategic plans.

Phase 4 – Communication, Review, Adjust, Size

This work is done during the planning cycle for the current quarter. Once I have identified the first set of PSRs to be sized and their priority order for each team, I post the planning book, communicate it to all stakeholders and ask the teams to begin sizing. Meanwhile we can all review the resulting lists and adjust them if needed. Outcomes include:

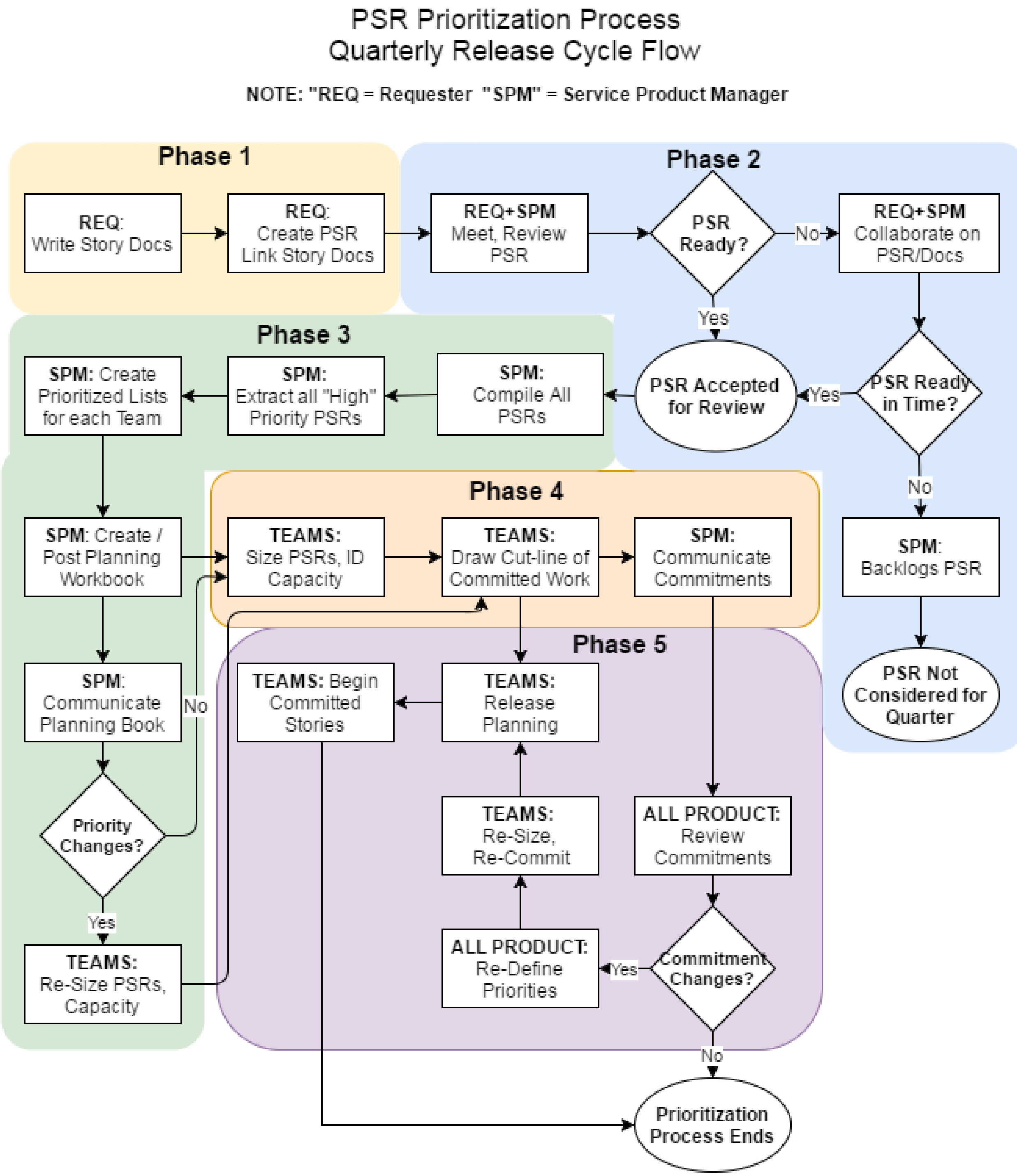
- The Service teams perform initial analysis of the PSRs, determine if they have enough information to size, identify dependencies and size what PSRs they can.
- Meanwhile the Product community reviews what the teams have been asked to size and can decide to change the priority order, add or remove items, or change the Business Value settings, the intent being to arrive at agreement as to what PSRs are crucial and important.
- The Service teams collaborate with the Requester's team to arrive at a high level technical understanding of the work to be more accurate in sizing.

Phase 5 – Final Sizing, Team Capacity, Cutline and Commitments.

This final phase is intended to be completed before the start of the development cycle so that the Service teams can go immediately to work on the top ranked items on their lists. Outcomes include:

- High level sizing of each PSR on the lists in story points that the teams can be confident represent the effort, risk and complexity involved with each PSR.
- A size in story points of the team's total capacity for the quarter, taking into account timeframes, team size, vacations and other factors that will affect capacity. From the total number, 75% is identified as being available for PSRs and other Product initiatives, while the remaining 25% is held out for tech debt and other PD-driven work.
- With the PSRs sized and capacity determined, the Service teams identify a cutline and I communicate to all stakeholders that what is above the cutline can be committed for the release. If there are objections to the outcome we can begin a cycle of discussions to modify the list, but the teams begin work on the top items immediately.

A Flow Chart of the Process



A Detailed Outline of the Process and Rationale

- **First, I ask the requester to take full charge of the request and drive it from start to finish.**
  - This means that the person whose name is in the "Requested By" field is the one responsible for organizing all aspects of the request, requirements, prioritization, etc.
  - They are also called upon by me and the team during all aspects of the work, and tasked with providing answers to questions and other info
- **I ask the requester to select the scheduled release they want the work completed** in the "Planned Client Release" field.
  - I use this to filter for all work wanted in a given quarter
  - Then each quarter I start a process of working with all requesters to decide on priorities:
- **I meet individually with each requester and:**
  - Review and update the details of the PSR, especially the "Business Impact"
  - Review the requirements provided and determine if they are in a state ready for the team to determine a high level sizing
    - If the state of requirements is insufficient the PSR is not considered for the current quarter
    - I work with the requester to develop the requirements in time for the current quarter if possible
  - The requester identifies a stack-ranking for all their PSRs
    - If a requester has more than one PSR for a given release, I need to know the ranking of their relative importance
    - The ranking needs to be unique across all service teams – not a "#1 for CBS, #1 for CAS", but a 1,2,3, etc.
  - The requester and I agree to the "Business Priority" (High, Medium, Low) for each PSR
    - This is critical for the next step – filtering the High Priority items for review by the teams
- **I then compile all current-quarter PSRs into a planning workbook and filter for those marked as "High"**
  - These form the first round of sizing
  - Only the PSRs rated "high" will be reviewed and sized until and unless the team finds capacity for more
  - Then "Medium" PSRs are considered, and so on
- **When I have identified the team ore teams (CBS, CAS or AIMS) that would take primary responsibility for the work and sizing for a set of PSRs I enter them into separate sheets for each team.**
  - Any given PSR can require work from multiple service teams, and this needs to be identified as soon as possible
  - I work with the PD group to do this, and take direct responsibility for those on CBS, CAS and AIMS
  - Other PMs need to be involved if their services are affected
- **I organize the workbook to contain all the artifacts used in the process** – individual requester PSRs, combined and team lists, notes, the official quarterly PMO schedule and other information, and post it to a SharePoint for Platform Services
  - All stakeholders can then view the workbook to see progress
  - I maintain all changes to the workbook in real time during the rest of the process

- **The teams then size all the High priority items identified for them and work to determine a "cut-line" of commitments**
  - They assign a story point size to each PSR
  - They determine the team's entire capacity in story points
  - They hold out 25% of that capacity for technical initiatives, setting the remaining 75% as for PSRs and other Product work
  - They draw a line in the list that represents the top items that fit into their capacity. These are the ones they can commit to delivering
  - The remainder below the line are not prioritized
- **I then give the PM organization the chance to alter the list if need be one last time.**
  - The deadline for having this process completed is established by PMO
  - By that deadline we have the list of our committed work for a quarter.
- **Those PSRs that don't make the cut go into the backlog and can be re-considered for a future release.**

On the one hand, this process may seem very complex and laborious. However, I have used this more informally over the past two quarters and found that we arrived at clearer priority decisions earlier, which got our teams doing the work on time instead of being delayed by our inability to get them clear direction. I also need a way to deal effectively with the sheer number of requests from so many different teams and to balance their needs with those of the business overall. My teams can deliver only about a fifth of the work requested of them each quarter. I need to carefully vet what makes it through to the final list.

I hope you will understand the need and work with me through these steps to get to the best decisions earlier in the cycle. We all win when that happens.