

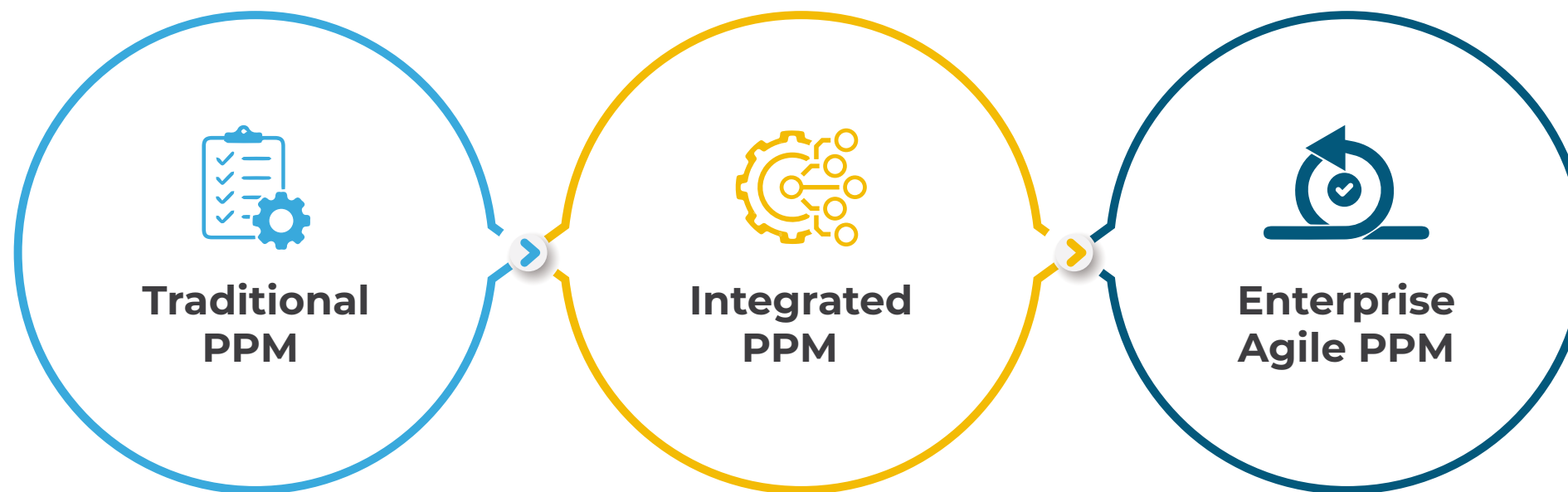
Portfolio Management with Jira Software

Guide: Implementing Project
Portfolio Management
with Jira Software



Your teams use Atlassian Jira Software to manage software development projects. As an executive, you are looking for better and more efficient way to organize work of teams and manage portfolio of projects in your organizations, including IT projects managed in Jira.

Modern approach for a agile transformation of the PMO has 3 phases:



This guide focuses on aspects enabling Portfolio Management for projects managed by IT teams in Jira Software within Integrated PPM. This approach is fully aligned with Scaled Agile Framework to minimize changes in the future and protect existing investments.

- ✔ **Traditional PPM**
is approach for managing waterfall projects.
- ✔ **Integrated PPM**
is approach for managing both agile and waterfall projects.
- ✔ **Enterprise Agile PPM**
is usually achieved by implementing of Road mapping the Scaled Agile Portfolio Management – for example SAFe Framework at the enterprise and transformation of entire organization to agile value delivery. This is done on top of the Integrated PPM platform.

Scaling Agile at Organization

Scrum is one of the most successful frameworks for Agile software development by teams of all sizes.

Scrum mitigates against many of the problems encountered with traditional software development methods. Scrum provides an approach that has roles, practices and artifacts so teams can build shippable product increments in short iterations.

Same time, organization frequently struggle to scale scrum beyond the individual team level; they discover that additional operating practices are needed to plan and coordinate the work for large, multi-team projects; there is a need for a framework of interconnected practices that transform strategy into working products.

Many frameworks emerged to address the scaling challenge. Scaled Agile Framework (SAFe) is one of the most popular and widely adopted. SAFe is not only about doing scrum on a large scale – it defines additional practices for Business Strategy and Portfolio Management, Program Management, and Delivery Teams.



SAFe - like Scrum - is a framework, and must be adjusted to meet the needs of every enterprise and their state of digital transformation and maturity level.





SAFe Introduction

- ✓ Transformation of business requirement to working software flows through Portfolio-Program-Delivery levels.
- ✓ At each level, work is captured in a backlog, then it is pulled for the execution.
- ✓ All work is subjected to a Build-Measure-Learn cycle – a feedback loop that helps with continuous course adjustments.





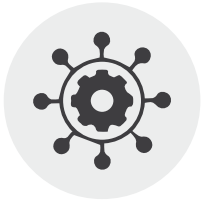
Portfolio Management

Each business unit within enterprise has portfolio of products and/or services. Portfolio Management is the process of centralized management of one or more portfolios.

A portfolio is a collection of programs or products managed to achieve strategic objectives; Portfolio management is process about deciding which initiatives to implement, with what priority.

In SAFe, the initiatives selected to implement strategy are usually defined as epics. Epics often require several program increments (releases) to deliver a full value. Each epic typically has a vision, MVP (minimum viable product) definition and a roadmap.





Program Management

At Program level individual business initiatives **(epics)** translate into set of product **features** that can be built by development teams.

Majority of detailed planning is done on the level of features; Program backlog items are broken down into user stories and estimated. Estimates are typically based on team velocity and then used to estimate the scope of what can be delivered within **PI (Program Increment)**.



PI Planning

A process to agree business objectives and scope (features, user stories) for the next **Program Increment** (release).



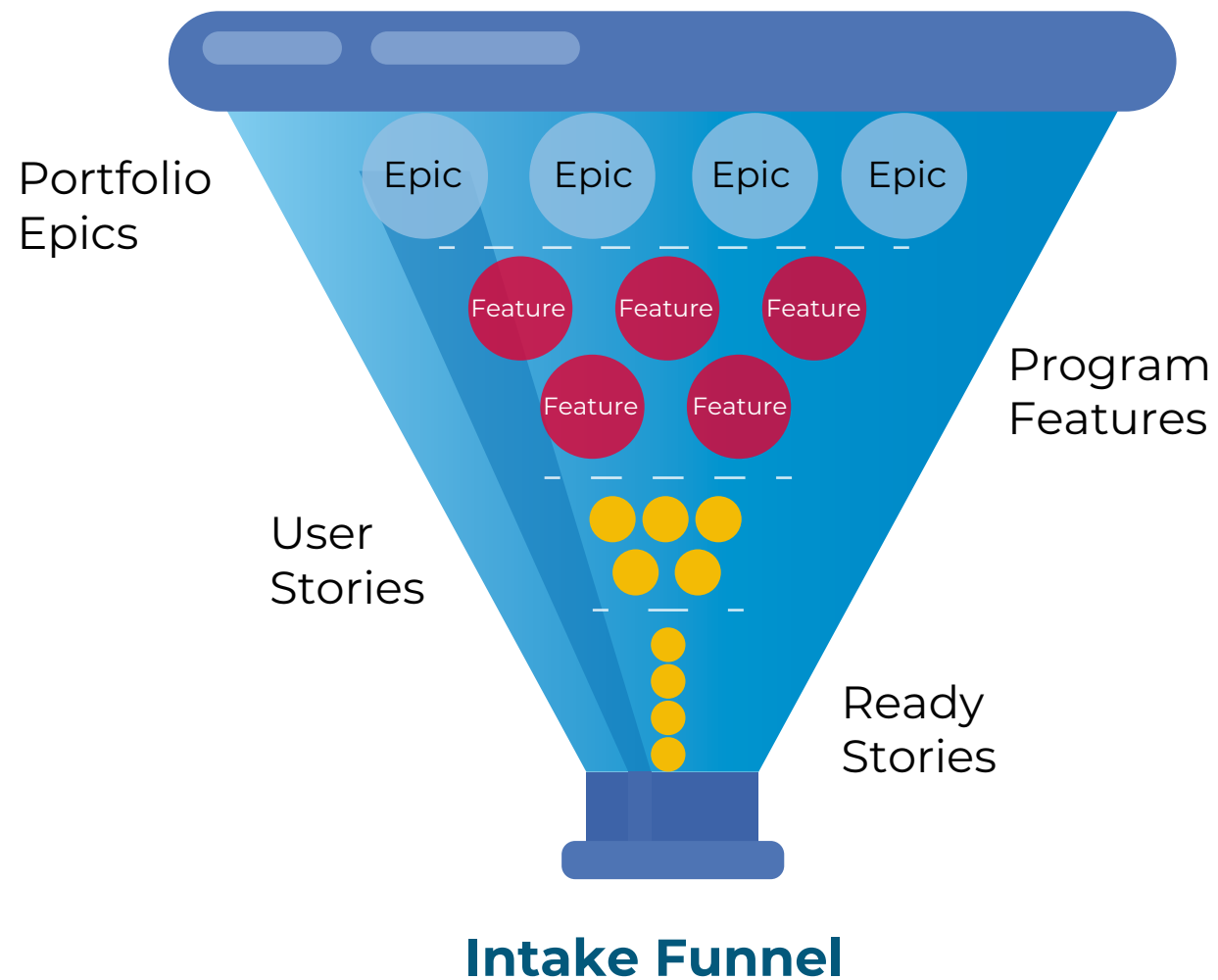
Delivery Teams Operation

Teams produce features incrementally, via short iterations that deliver production-quality software. Most teams use the Scrum framework - sprint planning, stand-ups, sprint reviews and sprint retrospectives to deliver working parts of PI Objectives.





Process Flow



- ✓ **Portfolio** is at Business Unit level
- ✓ **Epics** are initiatives and usually represented as programs, detailed into **Features**
- ✓ **Features** can be tracked at “projects” as they are limited in time and scope and detailed into **user stories**, later detailed into **tasks and bugs** and other work items. **Delivery Teams** work on delivering user stories that bring **value** up to the feature / program / portfolio.

Recommended Implementation Checklist

Your Teams in place:

Teams using one of the Agile frameworks (Scrum, XP, Kanban) to manage team work; there are Product Owners, Product Managers and Scrum Masters; Entire team is proficient in all basic team practices.

Are you there?

If not - train your teams with Scrum.

Continuous Integration and Test Automation in place / in development:

The output of every iteration is production-ready software - no separate test phases, no hand-offs, flow to production is optimal.

Are you there?

If not - develop and implement CI / test automation processes

ARTs identified:

Agile Release Trains support development value streams. ARTs should be designed to release value independently. ARTs are typically organized around feature delivery.

Are you there?

identify and build all processes to support flow and CI / CD

Configure Jira Software:

Setup of Jira Software need to support your processes; Boards for Teams, Sprints, Tags, different Issues Types need to be configured to support PPM framework.

Are you there?

If not - read recommendations below

Implement Portfolio Management Framework at Scale:

Using Jira Software and other software components and tools to manage portfolio of projects.

Jira Software Configuration

One of the most important decisions is to decide if your organization tracks all work for related products in one project or multiple projects.

Both approaches have cons and pros; we found that when all related work is tracked as one Jira Software project, with multiple boards for different teams it makes much easier for teams to operate, collaborate, plan and access project related information.

Please note

key word here is **“related”** work; In our experience different and not related products should be in different Jira projects as they can be on different release cycles, have different strategies and priorities.



Jira Software Setup and Configuration



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Jira Software Configuration to Support SAFe

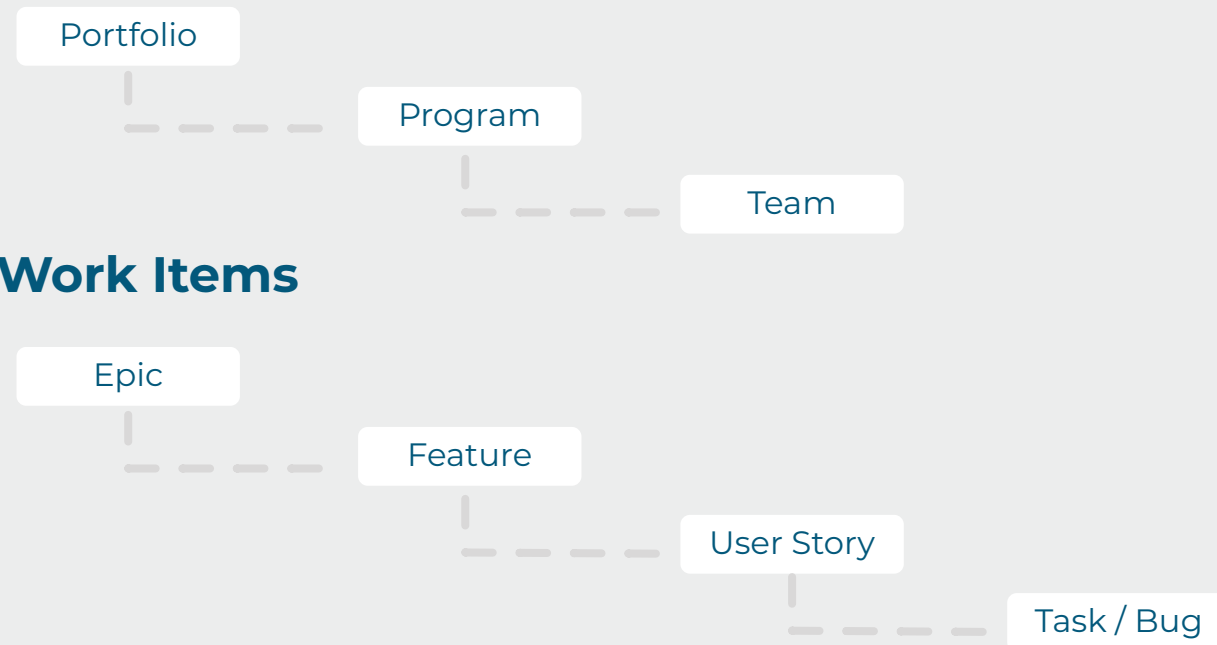
Atlassian has a set of recommendations of configuring Jira to support Scaled Agile Framework.

At minimum to enable the proper portfolio management approach for Jira Software, we recommend to focus on several areas of configuration:

- 1 Configuring Boards for Teams** – Creating Hierarchy of your Agile Teams
- 2 Configuring Issue Types and workflows** - epics, features, user stories, task and bugs, capabilities*, enablers*
- 3 Configuring Sprints** - Sprints (unfortunately, there is ***no simple way*** to define **Program Increments**)
- 4** Using Tags to track Value Streams and Milestones
- 5** Using Confluence to track everything related to your projects and epics like vision, canvases, strategic themes, milestones etc.

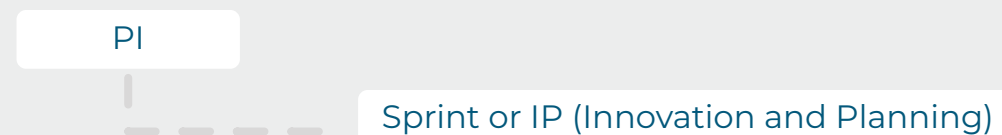
Jira Software Configuration

Teams Structure (Boards)



Work Items

Program Increments and Sprints



Value Stream

Tags

Milestones (Key Dates - > Key Events?)

Custom fields / issues type

Objectives

Confluence

Goals

Confluence

Roadmaps

Advanced Roadmaps / PPM Express

Using Jira Software

When setup accordingly, Jira Software natively will allow teams to use following features

- 1 Portfolio Backlog** – all epics
- 2 Program Backlog** – all features
- 3 Team Backlog** – all work assigned to a team
- 4 Program Increment Backlog** – all work planned for specific PI (JQL / Tags)
- 5 Sprint Backlogs** – all work planned for specific iteration
- 6 Advanced Roadmaps** – a tool to visually create roadmaps
- 7** Use of Scrum boards / Kanban boards / Task boards
- 8 Confluence** for all related information

As you see, this approach covers nicely need of delivery team but frankly it is not easy to access, use and consume by business users and decision makers.

Also - Jira Software is a solution for software delivery and software teams and should not be used to manage non-software development projects –for example marketing or support or professional services work.

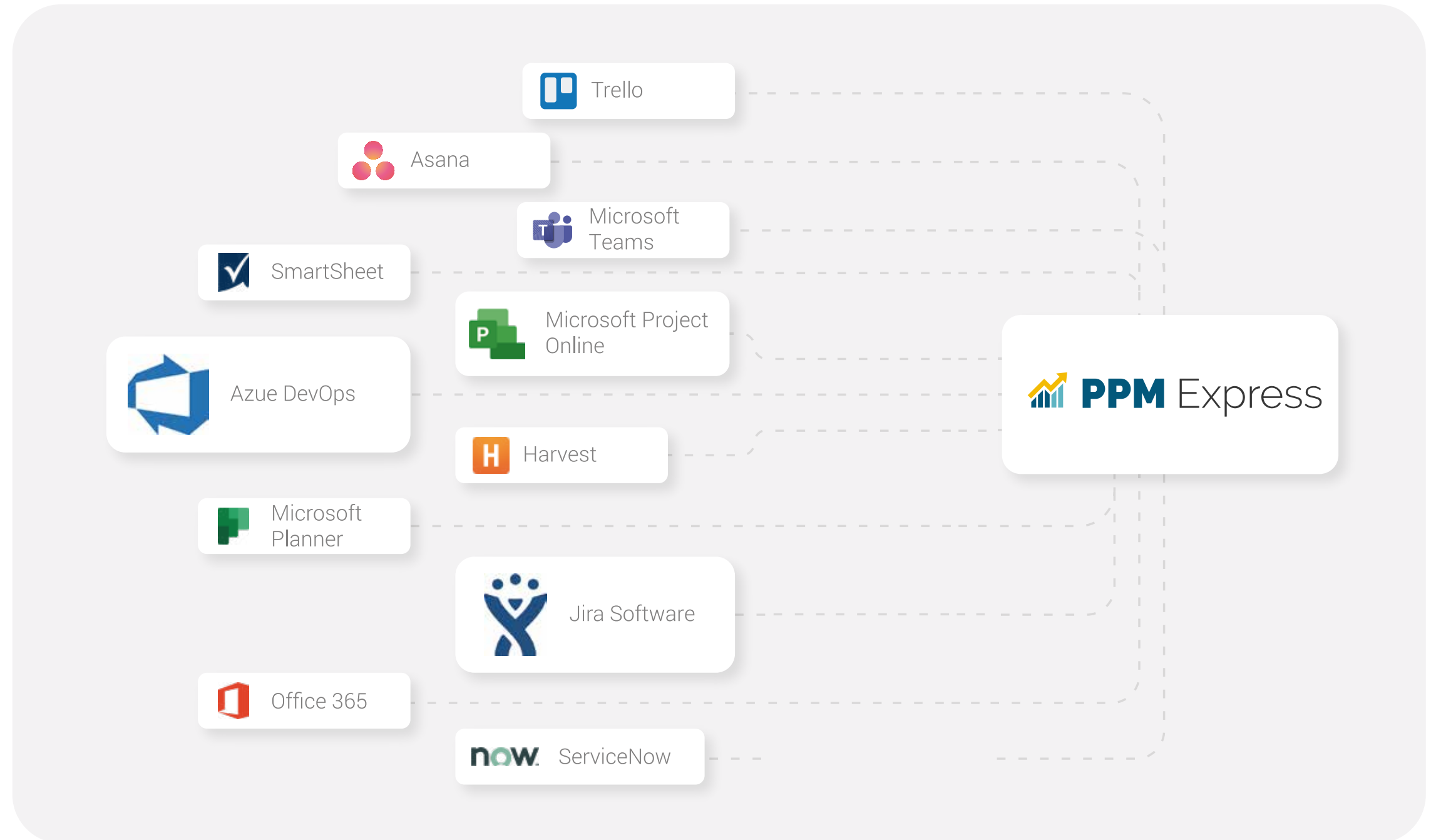
What Jira Software **does not support**

- ❌ Friendly experience for business users
- ❌ Integrated view for all work in the organization
- ❌ Powerful Project, Program and Portfolio-level Reporting
- ❌ Flexible roadmaps for cross-team, cross-business-unit plans and roadmaps
- ❌ Integration with other Project and Work Management (MS Planner, Microsoft Project, Project for The Web, Jira etc.)
- ❌ User-friendly Milestones
- ❌ Project Intake / Ideation / Initiatives Intakes
- ❌ Portfolio, Program, Project Feature prioritization models other than WSJF / Score
- ❌ Portfolio, Program, Project / Feature Statuses
- ❌ Budgets (Traditional and Agile)
- ❌ Risk Management
- ❌ Detailed or Resource Planning
- ❌ Objectives and Key Results

Integrated Portfolio Management Approach

PPM Express is a complete PPM platform, designed on the Integrated Portfolio Management concept. It is aligned with Scaled Agile principles and supports portfolio management for all types of work – both IT and non-IT.

www.ppm.express



Integrated Portfolio Management with PPM Express

PPM Express enables organizations with:

- ✓ Portfolio Management
- ✓ Program Management
- ✓ Project Management
- ✓ Task Management
- ✓ Budgeting
- ✓ Resource Planning
- ✓ Roadmapping
- ✓ Prioritization, Strategic Themes, Strategic Alignment
- ✓ OKR (Objectives and Key Results)
- ✓ Ideation/ Initiative Intake
- ✓ Advanced Reporting with Microsoft Power BI
- ✓ Integration with multiple platform
- ✓ Automation and API

Schedule your free consultation with our PPM Transformation Team today to discuss your goals, objectives and current state of your processes at **www.ppm.express/transformation**





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