ENTERPRISE RELEASE MANAGEMENT

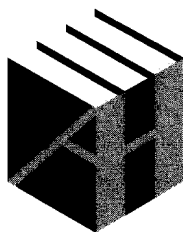## Agile Delivery of a Strategic Change Portfolio

Louis J. Taborda

Enterprise Release Management

Agile Delivery of a Strategic Change Portfolio

Louis J. Taborda

ARTECH
HOUSE

Enterprise Release Management

Agile Delivery of a Strategic Change Portfolio

Preface

Anyone who has worked in a modern enterprise knows it is a complex environment where attempts to mobilize resources to achieve strategic outcomes can be frustratingly difficult. With differing and often conflicting agendas of business units, project teams, and IT departments, it can sometimes appear as if the greatest challenge in large organizations come not from competitors but from within the enterprise itself.

Business executives, who have the unenviable task of charting an enterprise's strategic course through an increasingly competitive, globalized marketplace, recognize that agility and adaptability can provide competitive advantage. Yet the reality is that executing a strategy and getting ideas to market expediently and cost-effectively can be problematic. The clamor internal to the enterprise complicates decision making and the market response is slowed by internal inefficiencies including poor communications and information sharing. Priorities get confused between the plan and its execution, so that what is delivered to customers is often a compromise that is late and over-budget.

As the engine room of the modern enterprise, information technology (IT) is at the heart of many initiatives that require the aggressive delivery of the capabilities needed to execute the business strategy. However, delivering these capabilities—the products and services demanded by the business within time and cost constraints—has often proved too great a challenge. The failure of IT projects has been a common theme in recent times and disappointment with IT's ability to deliver on its potential has become a prevailing sentiment in the enterprise, irrespective of whether it is an in-house department or outsourced service provider.

Yet these are mere symptoms of the general lack of clarity evident in the modern enterprise, and projects are simply the bellwether, or the messenger, highlighting our growing inability to cope with enterprise complexity. A recent

survey of global CEOs conducted by IBM [1] found that while today's complexity is only expected to rise, more than half for the over 1,500 CEOs, general managers, and senior public sector leaders around the world interviewed doubted their ability to manage. These leaders emphasized the need for creativity, experimentation, and innovation, suggesting that we are at a juncture where earlier management truths are breaking down without the opportunity to fully comprehend why. It is no surprise therefore, that many business leaders have an uneasy feeling that once trusted approaches and practices are somehow less relevant.

This book aims to identify the root causes of the problems executing strategic programs and presents a remedy we term enterprise release management (ERM)—a release-centric management framework for reliably delivering strategic outcomes. Not all readers of this book may experience that Eureka! moment where the problem crystallizes and the challenges of planning and delivering strategic change in complex environments are resolved. But I am confident that the ideas herein will spark new insights and offer practical and effective ways to synthesize the multiplicity of competing demands that have to be juggled in successfully delivering an enterprise change portfolio.

Scope and Terminology

An indication of the newness of a paradigm is the difficulty in expressing it. Finding the appropriate language to describe ERM and the generalizations it entails present some challenges. Many words that one must rely on to describe the release paradigm, including the word release itself, are vague, overloaded with several meanings, or commonly corrupted. It is particularly difficult to establish generalizations without the temptation to coin a completely different language.

An attempt has therefore been made throughout the book to use generic terms that have minimal baggage, and sometimes that has meant going back to a more simple language. Introducing terms like solution delivery into the discourse have required consideration, as to simply use program/project management (PPM) terminology would not be appropriate when arguing that a new release paradigm was in fact needed.

The word delivery is appropriate, as many projects today do not require development, being either implementations of packaged solutions or involving outsourced teams that are not under direct project control. As such, it is hoped that the increasing awareness of services delivery and management terminology and its straightforward interpretation provide the flexibility for ERM to encompass more than just development, and indeed transcend the project construct as a delivery vehicle. Without relying on general terms, we would be in the

paradoxical situation of using old management paradigms to describe new ones; a situation that can obscure the fundamental issues that have to be addressed.

Similarly, the use of the word solution is an attempt at generality. While much of the language describing the enterprise comes from the IT industry, use of the word solution instead of software, system, or application attempts to recognize two things:

1. That there is more to any business change than simply delivering new technologies; processes and people aspects have to be considered, along with the financial means necessary to achieve the desired outcome.
2. Solutions can also be seen to encompass products and services of indeterminate type, including marketing, facilities, and engineering initiatives that may form a part of an enterprise strategy.

Solution is therefore used to broaden the scope of what a release may constitute, and like the term project, can be seen to be generic and independent of what it is that is being delivered. While the word system in its most general meaning might equally suffice, common usage tends to reduce a system to integrated hardware and software rather than interpret it in a wider organizational context.

Even the term management brings with it preconceptions and is open to interpretation. The road to ERM is one that takes us from the command and control interpretation of traditional management to that of greater collaboration and coordination required in managing decentralized teams and structures. The tools and techniques that arise from the release paradigm can be used to attain a new level of governance and oversight, or they can be applied to improve coordination between self-managed teams. ERM itself is neutral and agnostic of the more detailed methods and process frameworks; encompassing both plan-driven and agile approaches to delivery. It offers a unifying governance framework without imposing its own management philosophy or demanding that traditional management approaches be abandoned. Instead it provides a notation for synthesizing and aggregating crucial management information at a suitable level of abstraction that allows leaders to make informed and timely decisions.

Who Should Read This Book

The tussle with terminology described above and the attempt to keep the language neutral, avoiding the biases of any particular discipline is worth the effort to ensure readers from a cross section of the enterprise can find common ground. Keeping this book accessible and understandable to the different enter-

prise roles is essential as there is little chance of integrating the different facets of the federated enterprise if we cannot find a common representation and framing of our collective experiences.

Presenting a new, unifying paradigm for enterprise evolution needs to bring together the perspectives of those responsible for the determination, planning, execution, and realization of the optimum business strategy mix. This book therefore targets different stakeholders across the "enterprise release life cycle," offering different insights to each while maintaining a coherent vision that aims to bring these factions (dare one say silos) together. Without getting lost in the detail of each specialization, this work targets practitioners and students in the following key readership groups:

- *Business and IT executives* who sponsor the strategic initiatives and want to shorten the delivery timescales and have greater management visibility of progress. Such roles are looking to deliver business value and avoid the frustrating delays that impede the implementation of their strategies.

- *Portfolio managers and project management office (PMO) managers* who work across multiple programs and projects to provide consolidated reporting. These central roles need to reconcile and prioritize often conflicting demands in order to best allocate limited resources.

- *Program/project manager, product managers and business analysts* who collect and analyze customer requirements to flesh out the strategy and drive the solution design, but suffer compromised delivery schedules when facing the reality of limited resources.

- *Enterprise and solution architects* who are responsible for aligning business and IT strategy and identifying solution alternatives, while ensuring business and IT impacts are understood across the increasingly complex and interdependent enterprise architecture.

- *IT and technology managers* responsible for the delivery of the technical components—whether systems, products, or services that have to be procured, developed, engineered, or integrated—to provide the solution capabilities. As creators of the enabling technologies that ultimately power the enterprise, they feel the pressure of working to often unrealistic budgets and schedules.

- *Testers and delivery managers* who, as the last step between the plans and the reality, have to consolidate multiple delivery streams into a coherent release, identify stakeholders and customer proxies who are impacted, and ensure the final release is accepted and transitioned into business as usual.

- *Business and IT operations* who are responsible for maintaining the business-as-usual (BAU) but have their own changes and enhancements that can get sidelined as the focus is on major projects that consume resources and management attention.

Observant readers will note the omission of the release manager role. This role has been purposefully avoided due to the many interpretations the role has in the enterprise—something that this book hopes to address and refine. So to those of you already acting in that capacity, this book can offer the means to extend your influence and clarify interactions with related roles in the enterprise.

Structure of the Book

Attempting to present a grand unification of enterprise change and transformation is one thing; navigating the results is another. The problem with introducing a new, somewhat heretical, and possibly disruptive management paradigm is that to describe it needs the reader to step back and reexamine some fundamental assumptions.

Yet in our time-poor world we will often just scan a book, quickly find the key concepts, and move on. So in an attempt to make the content digestible, this book has a modular structure which, like any good architecture, should allow the reader to focus on a particular aspect of the ERM story. The structure of this book, shown in Figure P.1, provides a guide to the main concepts which are organized as follows:

- The first chapter makes the case for release management at the enterprise level. ERM should be firmly grounded in the shared management concerns related to project execution, systems development, and enterprise architecture.
- The next two chapters look at the contrasting approaches to solution delivery which currently hold sway. Chapter 2 reviews the two apparently opposed management viewpoints of plan-driven versus agile development that respectively address change and complexity. Chapter 3 then discusses the ubiquitous project paradigm, identifying conditions in the enterprise that can reduce the effectiveness of project management. While these chapters revisit arguments that have been made elsewhere, they provide the point of departure from more familiar management approaches to increasingly necessary release-centric approaches.
- The crux of the ERM is described in the next two chapters. Chapter 4 identifies the enterprise pattern that inevitably results when multiple
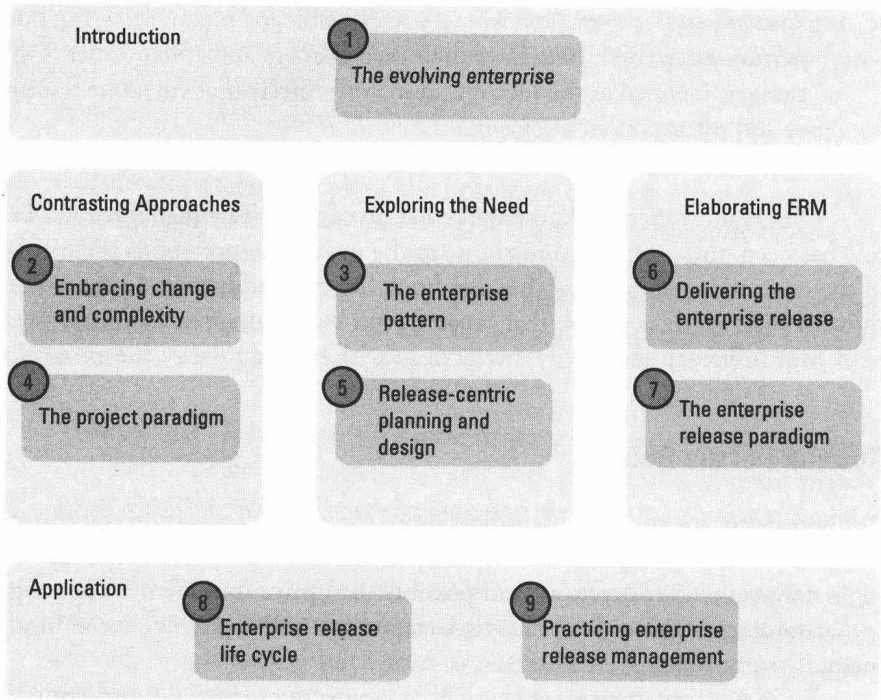
Figure P.1 Navigation for readers.

projects impact a complex enterprise architecture. The resulting inter-dependencies between these initiatives give rise to systems behavior that are shown to need more integrated management. Chapter 5 identifies the release as an important factor in selecting a change portfolio for execution. These chapters highlight the need for integrative and cohesive techniques to balance the potential multiple changes have to splinter an architecture.

- ERM practices are elaborated in the subsequent chapters with Chapter 6 relating the release-centric perspective to an industry study on business alignment versus IT efficacy. This motivates an analysis of the different relationships between business customers and solution suppliers patterns that give rise to corresponding delivery patterns. Chapter 7 introduces the matrix notation that resolves the most complex enterprise pattern and offers a representation for the multiple stakeholder viewpoints present in an enterprise release.

- The final two chapters apply ERM principles with Chapter 8 extending the matrix model to provide a multiproject release life cycle model. A timeboxed release roadmap is shown to offer a framework for planning

and executing strategy. Chapter 9 discusses the implementation of ERM in the enterprise and discusses the implications of the new approach and its relationship to different practices in the enterprise.

To get the most from this book, it is recommended that the reader at least read the introduction of each chapter sequentially even as the remaining details can be selectively skipped for future consideration. Figure P.1 outlines the particular areas where the different roles can expeditiously concentrate.

Reference

[1] Institute of Business Value, *Capitalizing on Complexity,* IBM Corporation, 2010.

Introduction

This book proposes the release as the next paradigm for the management of evolving businesses and IT architectures. Past efforts to improve efficiency by breaking down silos and consolidating investments in IT solutions now mean that changes to the business are no longer isolated. Instead, growing interdependencies mean that even simple projects often impact multiple business processes and enabling IT systems. To compound the complexity, most organizations have to contend with multiple projects impacting the enterprise at any given time. The modern decentralized enterprise thus requires us to better manage interdependent change portfolios and to reconsider current project-centric management practices.

Enterprise release management (ERM) takes a holistic view of a change portfolio and its impacts on the enterprise. It combines traditional management perspectives including project/program management and enterprise architecture, and integrates them into a release-centric approach that borrows from software development's agile methods with its emphasis on iterative delivery and configuration management. The ultimate goal is to achieve a unifying management perspective of strategic change delivery at the appropriate level of abstraction. ERM's focus on the big picture offers business and IT leaders the tools to finally chart and track the business' strategic course without being distracted by the details that current management practices address.

This book provides guidance on the processes, tools, and techniques necessary to achieve visibility and governance of an enterprise's strategic evolution. It stimulates readers to rethink the way that organizations manage business transformation and deliver strategic change, demonstrating why the project as a management construct is less effective in the modern business context. Insights into what makes project success elusive provide the impetus for new portfolio-based release management techniques that enable a holistic perspective of an

enterprise's change initiatives. ERM provides the tools to manage the portfolio life cycle and coordinate the attendant dependencies, negotiations, and compromises that have to be made by enterprise stakeholders.

A unifying release-centric paradigm is shown to be necessary for the planning and execution of strategy in the enterprise context. The case for ERM is made clear in organizations where a change portfolio comprising multiple programs of work impacts the enterprise architecture. In such environments, an integrated enterprise release consolidating the deliverables from multiple projects becomes the appropriate vehicle for delivering change—not projects! While projects remain the means of managing scope and organizing its execution, the entire portfolio needs to be integrated, tested, and released as a whole.

While enterprises have endeavoured to become agile by embracing change and aligning IT with business, this can be ineffective when attempted in isolation. The reality of shared services and IT infrastructure give rise to greater management complexity that is rarely addressed in planning and coordinating change programs. By embracing this complexity at the appropriate level of abstraction, this book provides simple tools that enable enterprise resources to be better deployed to optimize the delivery of strategic change. ERM can offer a business new oversight and processes to better track delivery progress while providing the tools to support management agility in delivering a strategic change portfolio.

Contents

1

The Evolving Enterprise

*If a man will begin with certainties, he shall end in doubts; but if he will be
content to begin with doubts he shall end in certainties.*
—Francis Bacon

The term enterprise release management (ERM) needs both an introduction
and some measure of justification. The word enterprise is overused; placed in
front of any management discipline to lend it substance it can serve to lose
significance. In this book, the term enterprise is used to describe a high-level
integrating perspective of a multifaceted, distributed organization.

Achieving an enterprise perspective is notoriously difficult to attain, as
it requires piecing together and synthesizing the different, siloed views of the
myriad business and functional units across the organization. Traditional re-
ductionist thinking has been good for breaking down organizational complex-
ity through analysis and decomposition, but leaves us with the challenge of
synthesis and integration. By introducing a generalized release paradigm, this
book offers a means of achieving a consolidating, strategic perspective of an
enterprise's evolution.

ERM is therefore about integrating and scaling a number of familiar de-
velopment management disciplines to the enterprise level. In doing so, new
patterns can be recognized and abstractions exploited to provide the manage-
ment visibility needed to guide the delivery of a strategic change portfolio. It is
this portfolio that directs the enterprise's evolution—and it is evolution. While
the term enterprise transformation is increasingly popular, seeking to use such
catchy phrases can overlook the need for operational continuity. As used in this
book, evolution encompasses changes of different scale and granularity. This
includes strategic transformations, since rarely does a transformation create an

1