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QUICK START STAKEHOLDER PRIORITIZATION TUTORIAL

1. Introduction
2. Planning criteria (prioritization schemes)
3. Prioritization scale and prioritization quality
4. Login
5. Access to ReleasePlanner® main page
6. Access to planning criteria and items to be prioritized
7. Prioritization
8. Submitting your priorities
9. Confirmation page
10. Prioritization as part of the overall planning process

1. INTRODUCTION

The following Quick Start Guide will help you better understand the prioritization process in ReleasePlanner®.

The term 'prioritization' is used for the process of classifying objects according to their degree of importance. These objects can be product requirements or features, projects, services or any other company specific assets to be prioritized. We will call them "items to be prioritized" in this tutorial.

A critical factor in project success is the ability to make well-informed decisions about when items to be prioritized should be implemented and released. While ReleasePlanner® can provide computational intelligence and decision support in this regard, your intelligent input is vital to this process. The more qualified and meaningful your input, the more likely the results will match the overall real-world planning objectives. The results are based on the prioritization input as well as on the resources consumed by the prioritized items. Overall, this results in a computationally complex problem that is solved with specialized optimization algorithms.

2. PLANNING CRITERIA (PRIORITIZATION SCHEMES)

Prioritization can be done from the perspective of different criteria. ReleasePlanner® offers some often used criteria but also allows to define specific ones. The specific criteria are derived from the strategic goals of your organization. The number of criteria may vary as well. You may be asked to prioritize according to one or more of the following criteria:

- **Urgency:** the urgency of having a feature or requirement implemented, a project completed, etc. (1–9 scale, with 1 being least urgent and 9 being most urgent).
- **Value:** the value that a feature, requirement, etc. adds to a project or a product (1–9 scale, with 1 having lowest value and 9 having highest value).
- **Risk:** the risk involved with implementing a feature, requirement, etc. (1–9 scale, with 1 being the lowest risk, and 9 being the highest risk).
- **Dissatisfaction:** the degree of dissatisfaction you would have with not having the item under consideration not assigned to the next planning period (release). For that, 1 indicates lowest and 9 highest degree of dissatisfaction, respectively.
- **Custom (Other):** Project managers may also decide on

other planning criteria that you will vote on.

3. PRIORITIZATION SCALE

ReleasePlanner® employs a nine-point scale to articulate your preferences for items being prioritized. As a rule of thumb, for each criterion, a rating of "9" corresponds to the best rating an item can receive, while a rating of "1" corresponds to the worst rating. In general, this allows sufficient differentiation between the items.

To achieve meaningful results, you should try to

- be consistent between the priority assigned to all items (eventually performing a cross-check after initial prioritization),
- use the "no opinion" option in case you either do not know or do not understand the item being prioritized, and
- try to diversify as strongly as possible the priority between items (to avoid uniform treatment).

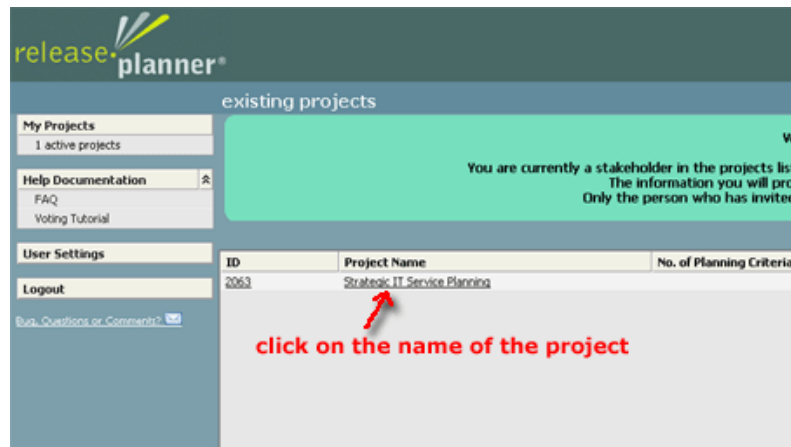
4. LOGIN

From the ReleasePlanner® login page, start by entering your username and password. This information should have been emailed to you when you were assigned to be a stakeholder. If you do not know your username or password, or if you have forgotten either, you can click on the "Forgot your password?" link for instructions on how to retrieve this information.

The screenshot shows the ReleasePlanner® login interface. At the top, the logo 'release.planner®' is displayed in green and yellow, with the tagline 'INTELLIGENT DECISION SUPPORT' and navigation links 'PRODUCT', 'LOGIN', 'CONTACT', and 'HOME'. A green banner below the logo says 'Welcome to ReleasePlanner®'. The main content area is a light blue box containing a 'Login' form. The form has a title 'Login' and two input fields: 'Username' and 'Password'. A red oval highlights these two fields. To the right of the 'Password' field is a 'Login' button. Below the input fields is a link for 'Forgot your password?'. At the bottom of the form area, a note states: 'Note: Recommended resolution for ReleasePlanner® is 1024x768.'

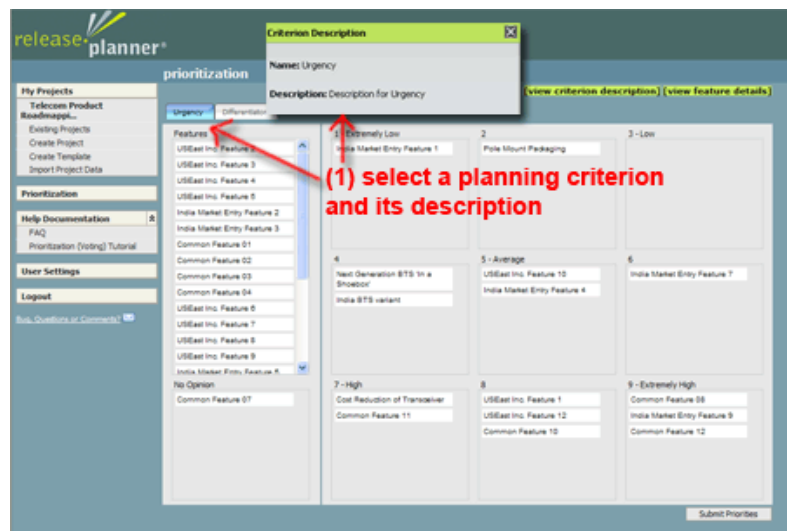
5. ACCESS TO ReleasePlanner® MAIN PAGE

After successful login, you will be directed to a listing of all projects to which you are assigned as a stakeholder. Click on the name of the project on which you would like to perform prioritization.



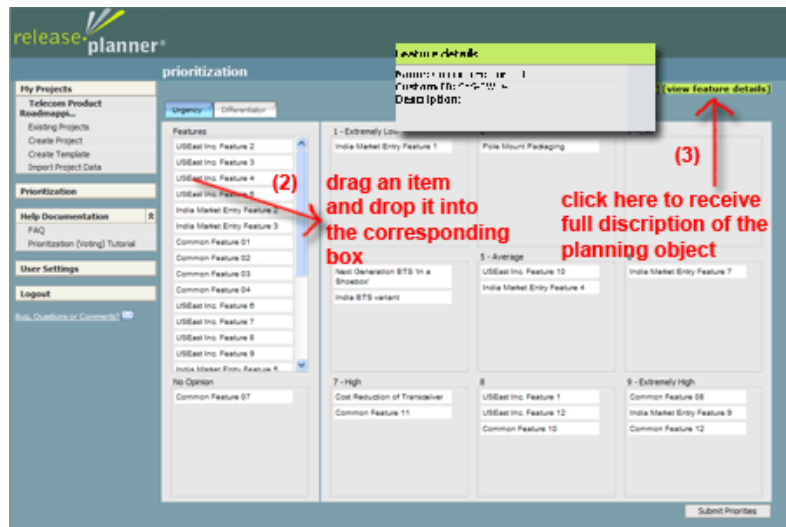
6. ACCESS TO PLANNING CRITERIA AND ITEMS TO BE PRIORITIZED

You will be directed to the main prioritization page. **(1)** From here, select a planning criterion from the list of tabs (for example, "Urgency") by clicking on it. Click on [view criterion description] to view its description.



(2) Take a look at the list of items to be prioritized.

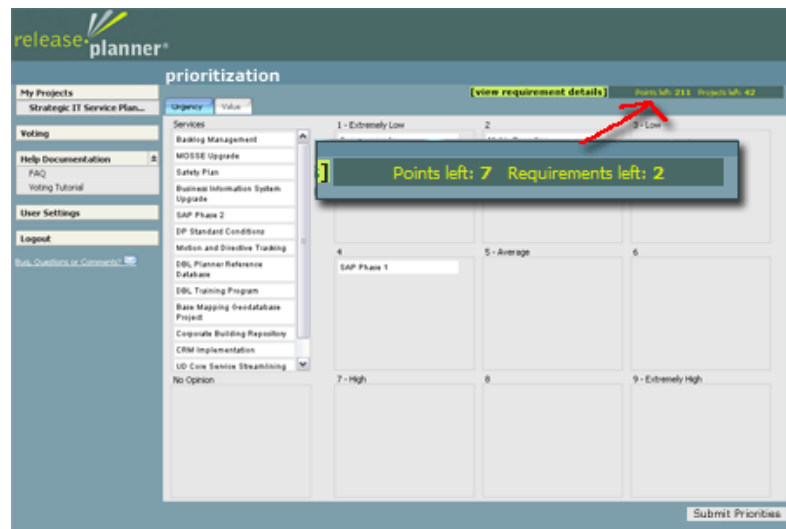
(3) Open [view feature details] to receive full description of the planning object. Clicking on an item will display more details of its description.



7. PRIORITIZATION

The prioritization is facilitated by a **drag and drop** feature that allows you to place items into the designated boxes on the right of the screen.

In the case of “Cumulative voting” (enforced by the project or product manager), you have a limited number of points to be distributed among all items. In this case, a quota will be displayed in the top right of the prioritization page.

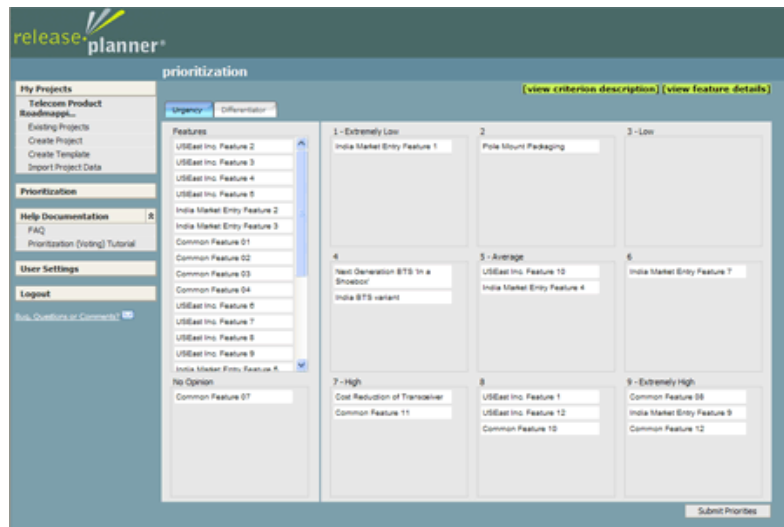


If you do not have an opinion about a certain feature, you can drag it into the "No Opinion" box below the items list. If you're not certain about how to vote on certain items, you may also leave them in the items list and come back to them later.

Each time you prioritize an item by dropping it into one of the boxes, your progress is remembered by the system. Therefore, you may leave the ReleasePlanner® site and return at a later time, and your priorities will not be lost.

8. SUBMITTING YOUR PRIORITIES

When you have finished to prioritize the various items according to all criteria, click the "Submit Priorities" button to submit your priorities to the system and make them available to ReleasePlanner®.

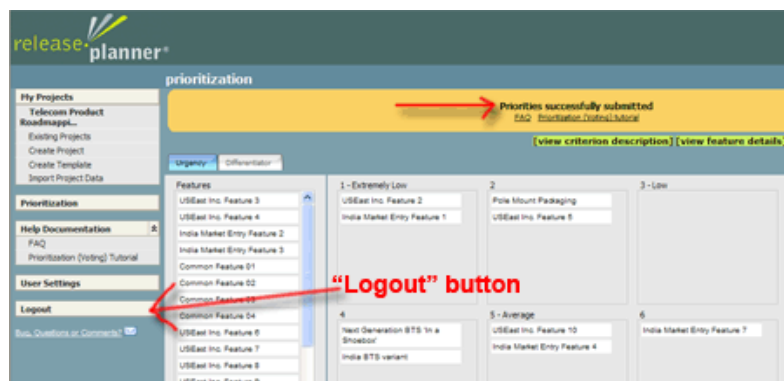


Clicking the **"Submit Priorities"** button will submit all the priorities you made, from all the criteria.

Please note that your opinion on the priority of items is extremely important to the overall prioritization process result. The more qualified and complete (number of items prioritized for all the defined criteria) your input, the more likely the suggested planning results will be meaningful.

9. CONFIRMATION PAGE

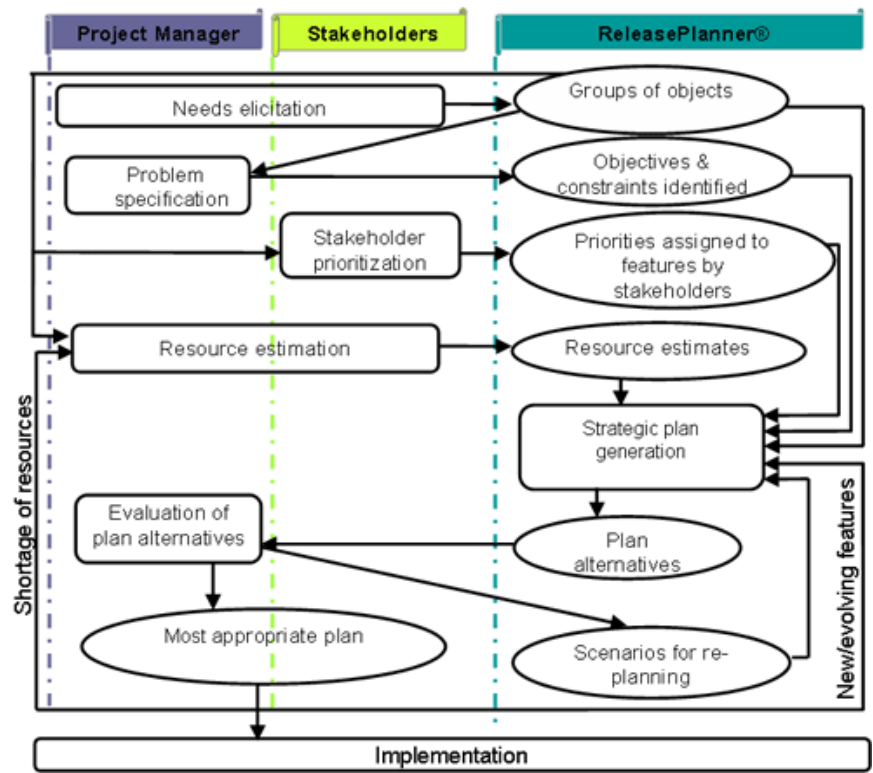
A message will be displayed, confirming that your priorities were submitted successfully. You may continue to prioritize or make changes to your existing prioritization if you'd like. Otherwise, you may click the "Logout" button on the left-hand menu in order to quit.



10. PRIORITIZATION AS PART OF THE OVERALL PLANNING PROCESS

Prioritization is an essential part of the overall process of strategic planning. This overall process includes needs elicitation (items to be prioritized), definition of planning criteria, and selection of stakeholders. At the end of this process, optimized planning alternatives are determined and the possibility of running what-if scenarios is offered.

The process model is shown below. In this model, rectangles denote executable tasks, and elliptical shapes refer to resulting objects.



Thank you for using ReleasePlanner®!

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