

Quarterly Planning Guidance

Boost planning and project execution

Navigating a complex, ever-changing environment requires agility, transparency, communication, and effortless prioritization across teams to outpace the competition. Our Advisory Services team will provide prescriptive guidance for establishing a roadmap that offers real-time project visibility for teams and leaders.

This service is designed to:

- Assist in setting up standards for multi-level planning and tracking capabilities
- Enable leaders to prepare and equip teams for quarterly planning to improve dependency and risk management
- Empower teams with greater visibility across the program, facilitating informed decision-making
- Provide access to quarterly reports and roadmaps to track progress, to enable visibility and work prioritization

This service is right for your organization if you:

- Utilize Jira cloud Premium and Confluence
- Engage in cross-team planning practices
- Encounter difficulties achieving your agile release train metrics

Overall expected outcomes



Tailored recommendations leading to:

- Improved attainment of your quarterly roadmap goals
 - Better achievement of agile release train metrics
 - Increased project roadmap visibility and team alignment across your organization
 - More accurate effort and scope estimations
 - Elevated delivery quality
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- Experience limited project visibility and alignment among teams and leader
 - Face siloed and fragmented work delivery across teams
 - Experience delivery bottlenecks due to dependency on other teams

Service details

Our team of Advisory Services Agile and Jira experts will precisely carry out the following service modules.

SERVICE MODULES	ACTIVITIES	OUTCOMES
Alignment and demo	<p>Collaborate with you and your team to establish engagement expectations and demonstrate Jira Advanced Roadmaps and Confluence capabilities for specific use cases, such as:</p> <ul style="list-style-type: none"> • Feature backlog refinement • Roadmap visibility • Dependency management • Project tracking • Objectives • Rolled-up reporting 	<p>This process ensures the establishment of working agreements and alignment on execution milestones. The demo will give you comprehensive insights into Jira Advanced Roadmaps and Confluence capabilities, empowering you to support the identified use cases.</p>
Alignment and demo	<p>Collaborate with you and your team to evaluate your current state and offer guidance on your desired future state. Topics will include:</p> <ul style="list-style-type: none"> • Operational practices • Challenges • Roles and responsibilities • Terminology 	<p>This assessment aids in comprehending your teams' preparedness for the solution and the present state of your planning process. It allows us to identify the ideal configuration and utilization of Confluence and Jira Advanced Roadmaps tailored to your team. We'll share our findings and suggestions and collaborate with you to align on your desired future state within the Atlassian environment.</p>
Application design	<p>Suggest the best configuration for Jira Advanced Roadmaps and Confluence, covering aspects such as:</p> <ul style="list-style-type: none"> • Jira project and board configuration recommendations • Confluence template recommendations 	<p>Your team will be set-up for success with Jira project and board configuration and Confluence template recommendations that you can easily implement.</p>
Team enablement	<p>Provide guidance to enable your team to tackle program-level jobs, preparing them for quarterly planning as a final step in the engagement. Topics include:</p> <ul style="list-style-type: none"> • Objectives • Risks • Dependencies • Reporting 	<p>This approach ensures your team is equipped to embrace the new process, paving the way for adoption and realizing identified outcomes.</p>

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