



Progressive Release Management

A Methodology for Managing Mobile
and Digital Content Release Planning

Progressive Release Management

Innodata's methodology for progressive release management provides a decision-based release framework that allows mobile and digital content to evolve and be delivered in a risk-free manner while meeting customer expectations.

Abstract

The move to digital and mobile content has changed the way in which content is delivered. Enterprise content can no longer be considered as a single discrete delivery against a “plan-build” project methodology with known and easily understood acceptance criteria. Instead, content-based products need to reach the market fast and continue to evolve in order to offer greater functionality to meet the ongoing needs of customers. To help meet these demands, product developers need to adopt software development methodologies that provide progressive release cycles allowing for validation and by customers — and against which the planned release of features and content can be controlled and risk managed.

In this paper, we describe the key technical and non-technical aspects that impact progressive release planning and how Innodata's framework for mobile content release management supports that process.

Introduction

Content development leaders are constantly managing many moving parts in order to create digital products that have the level of stability and quality demanded by its customers. A release planning approach allows for early delivery to customers and a controlled validation and evaluation process that mitigates the risk of delivering a product that fails to meet customer quality and features expectations. However, some release planning frameworks focus only on decision-making processes (such as what new features or changes to implement), and fail to target the real complexities and challenges faced by many content providers:

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A release planning approach allows for early delivery to customers and a controlled validation and evaluation process.



- **Understanding and deciding when new digital content is ready for release:** Assessing the optimal point and error tolerances can be difficult when considering content, product features and technology infrastructure. Failure to properly do so can lead to delays, uncertainty, wasted or inefficient use of resources.
- **Adjusting to digital:** Digital and mobile release scheduling is more cyclical, easier to plan and has a longer lead time than publishing in the digital world where the approach for release management is more akin to that used by software companies
- **Quality Measures:** Quality is no longer the preserve of content alone. It, too, is impacted by software development. How does a content developer understand the empirical quality measures that customers demand in order to make release decisions?

Release planning has the objective of ‘maximizing the benefit’, but it often fails to substantiate that ‘benefit’. The Progressive Release framework described herein establishes the criteria and factors required to establish that benefit, such as:

- The release policy vis-a-vis the customer’s view of releases.
- Standard release strategy vis-a-vis the types and timing of release.
- The technical constraints of performing multiple releases.

A Progressive Release framework, inclusive of criteria and factor details, is an effective way to plan a progressive release cycle for digital content and manage the project in a more holistic fashion.

High-Level Solution

The progressive release framework consists of three core components as illustrated in Fig 1. These provide a broad evaluation of constraints, factors and objectives across all stakeholders including the product owners / sponsors, sales / marketing teams, project management teams and technical / content delivery teams.

- **The release policy:** This considers the customer’s view of releases. An initial exercise examines customer expectations in terms of functionality, quality and release management.
- **The release strategy:** Based on the release policy and the product objectives the release strategy describes how and when product releases will be scheduled and what they expect to achieve.

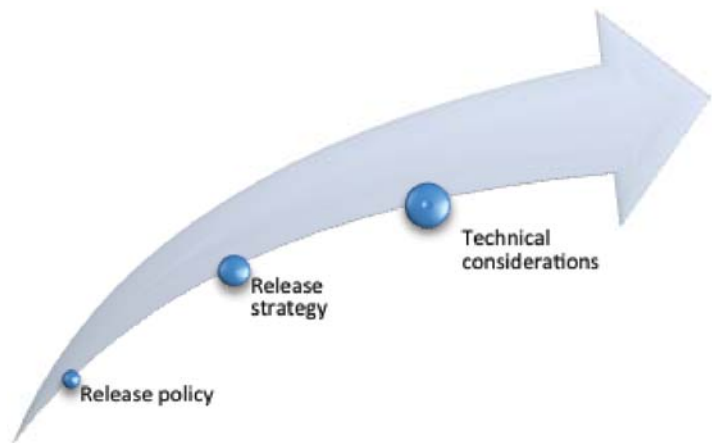


Figure 1: Components of a Progressive release

- **The technical considerations:** Determined for each release within the release schedule, this is where product developers consider the readiness, risk and activities required for each release and its subsequent adjustments based on an evaluation from the stakeholders, the release policies and project objectives.

Solution Details

Defining the release policy

The release policy is the evaluation of customer and stakeholder expectations using a multi-dimensional analysis that assesses the digital content's "characteristics." The evaluation will focus on the following dimensions:

- **Assessment of market acceptance:** This addresses the customer's assessment of digital conversion, and the criteria against which its quality should be measured.
- **The customer's ability to embrace a changing product:** This evaluates the customer's attitude toward multiple and frequent releases by answering questions like: Does the customer view increasing functionality as being relevant only when the benefit is obvious, or does the customer encourage new functionality to help them improve?
- **Customer expectations of release $n + 1$ versus release n :** This determines if a customer would prefer a new release to be made available only when offering new functionality or if they would consider additional stability, quality, bug fixing equally as important? It also clarifies if a customer is willing to accept increased functionality at the expense of minor bugs or product instability.
- **Feedback mechanism:** This defines how the required customer feedback for each release will be gathered and evaluated. For example, are customers content to "crowd evaluate" or is a more structure mechanism needed?
- **Multiple releases in the field:** This specifies if customers are willing to accept multiple releases — and if the organization can support this.
- **Product objectives:** This clarifies the overarching objectives for the content.

Defining the release strategy

Based on the release policies and project objectives (such as value, urgency, risk, return on investment, etc.) a release strategy outlines the number, frequency and type of releases. A standard digital product release strategy framework should be customized based on the information gathered through the release policy evaluation.

- **Alpha Release** — Has a limited release population with narrow review criteria and proof of viability and concept. It's typically of short duration, e.g., 1-2 weeks.
- **Beta 1 release** — Has a broader population release where all core functionality is incorporated and sample data available. It has a longer release period of 1-2 months.

- **Beta 2 to x**— This is a fuller planned release schedule that incorporates multiple versions and upgrades including bug fixes. It normally has no new features introduced; the scope is frozen.
- **Release Candidate**— A “Golden Master” is released to the Beta testing team.
- **Final**— This is the release to the broader customer base.

Technical considerations

Once the policy and strategy are defined and the capabilities of the product project are assessed, an initial release schedule is created that plugs the features and content into each release. This schedule is evaluated and revised following each release as part of an on-going product evaluation and planning exercise.

As each release is completed, it is released to customers and stakeholders with a release note that clearly indicates what it contains, known issues, the next steps and the information required from the customer upon evaluation. Each release has an increasing level of customer expectation in terms of features available and the quality and range of customers / stakeholders involved in its evaluation. As illustrated in Fig 2, once initiated this process provides a cycle of detailed release planning / scheduling, release delivery, customer / stakeholder evaluation and validation of the product in terms of features and quality that can be incorporated into each of the subsequent releases.

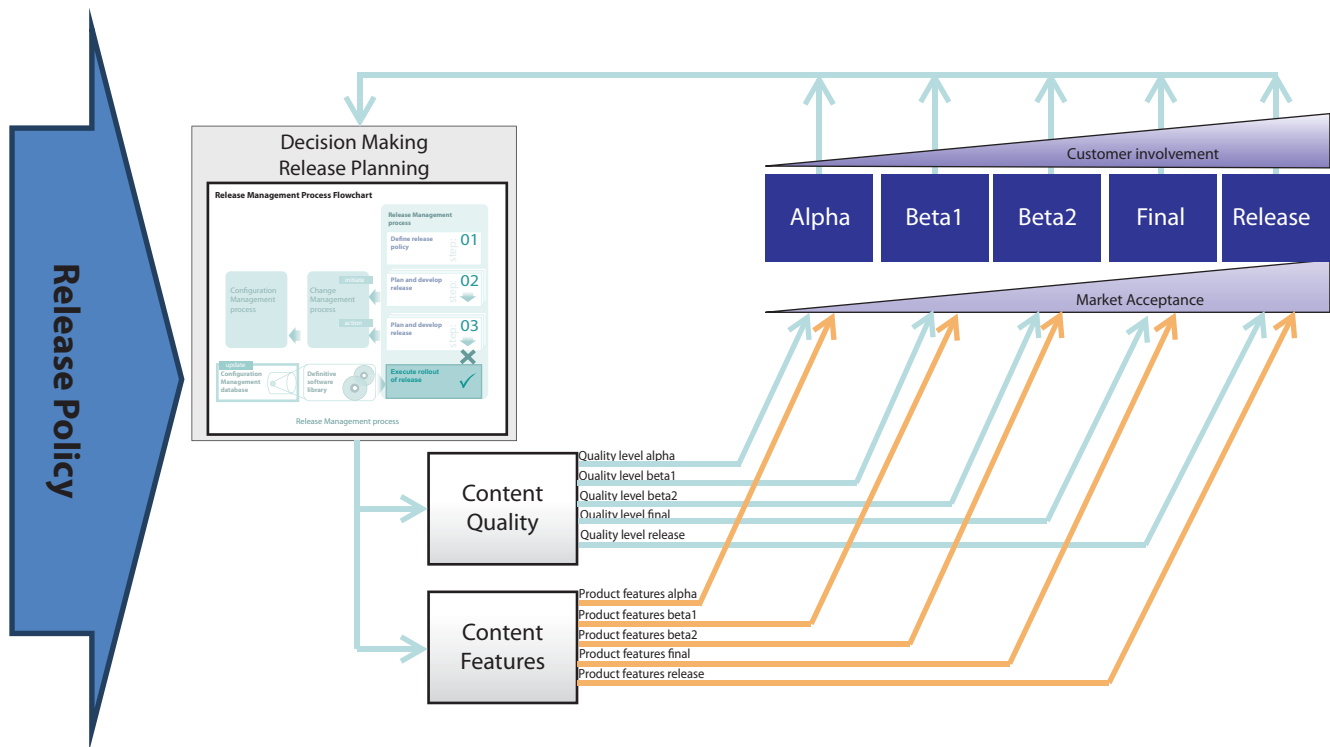


Figure 2: Release cycle

Although an initial assessment is made upon confirmation of the release schedule, the cyclical nature of the work and the customer and stakeholder evaluation / validation feedback means that each subsequent release should be planned and evaluated with regard to its ability to meet expectations. This evaluation and planning process will be performed using the follow factors:

- **Scope:** Re-evaluating what goes into upcoming releases. The release schedule should not look more than two releases ahead.
- **Time horizon:** The release cycle states the time interval for each release. Certain aspects will have been determined during the release policy and strategy definition to ascertain whether the release schedule is:
 - Planned with fixed and pre-determined time intervals for implementation; or
 - Planned with flexible intervals to adjust to varying customer requirements for new features in each release.
- **Objectives:** Determines how the release schedule aligns with the initial objectives in terms of urgency, risk, return on investment, etc.
- **Level of stakeholder involvement:** Identifies the right stakeholders for each release as well as their availability and readiness to perform the validation and evaluation of the next release.
- **Prioritization re-assessment:** Based on the evaluation by the stakeholders this unveils if the features and content priorities need be altered in the release schedule with respect to what is available and the quality of content.
- **Technological and content constraints:** This identifies if there any technology and content constraints with the delivery of the next release in terms of core features and interdependencies in relation to low priority items and content enrichment / quality.
- **Resource constraints:** This clarifies if there are any constraints with delivery of what has been planned or what is required by the evaluation and revised priorities.
- **Quality of solutions offered:** This defines the expected level of quality in terms of functionality and content. For example, is the solution on track against the release schedule and the release policies that have formed stakeholder expectations?



The cyclical nature of the work means that each subsequent release should be planned and evaluated with regard to its ability to meet expectations.



Business Benefits

The progressive release methodology provides the following benefits:

- Organized and measurable product feedback.
- Validation of core success factors & product design.
- Confirmation of performance viability.
- Market / customer validation.
- Establishment of thought leadership – by using limited releases with real customers who become involved and buy into the product.
- Evolving from “emotional” decision making into a controlled launch process.

Summary

Traditional content development processes that use a “plan-build” approach to releasing products were often discrete deliveries against a fixed schedule and scope. The digital business environment is different. It expects content to evolve over a lifetime, where features and content will continue to improve and change, and all will be delivered within shorter lead times. These new demands mean that determining a release approach for new products can be difficult to evaluate and is riskier given the nuances of understanding customer expectations.

Our progressive release framework eliminates risk from the release process allowing for a controlled and structured release cycle. Customer and stakeholder validation and acceptance rules are established prior to a full launch, thus avoiding a mismatch in customer expectations of features, content and quality.

Establishing a release policy that defines the expectations of (and constraints on) customers and stakeholders provides a more sophisticated framework against which release planning can be achieved. The framework, which uses multiple criteria rather than just the priority of features and functionality, provides a process that considers the holistic needs of the stakeholders. Furthermore, it remains flexible and can pro-actively adjust the release schedule and strategy by considering the release policies, constraints and objectives against the evaluation and validation performed with each release.

About Innodata

Innodata (NASDAQ: INOD) is a leading provider of business process, technology and consulting services, as well as products and solutions, that help our valued clients create, manage, use and distribute digital information. Propelled by a culture that emphasizes quality, service and innovation, we have developed a client base that includes many of the world’s preeminent media, publishing and information services companies, as well as leading enterprises in information-intensive industries such as aerospace, defense, financial services, government, healthcare, high technology, insurance, intelligence, manufacturing and law.

More Information

For more information about Progressive Release Management, please visit www.innodata.com, call us at 201-371-8000 or contact us at solutions@innodata.com. We also encourage you to read these other papers in our *Enhancing Customer Engagement in the Post-PC Age* white paper series which you can find at www.innodata.com

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