Planning for Success

By Neetika Bansal, Head of Engineering, Money Movement, Stripe

About me!

- 3 years at Stripe
  - Building experiences and platform to enable global money movement at scale

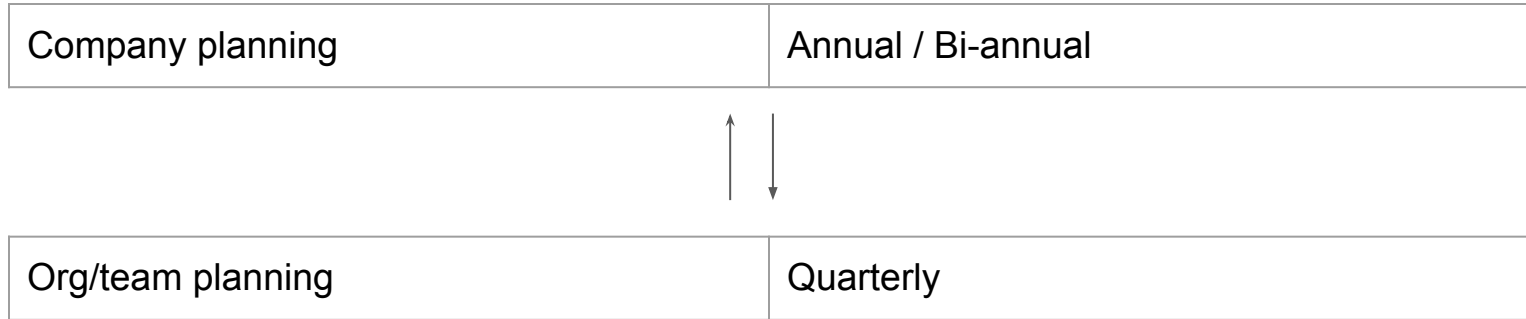- 4 years at Google
  - Worked on Display advertising and Messaging

Why plan?

1. Set north-star
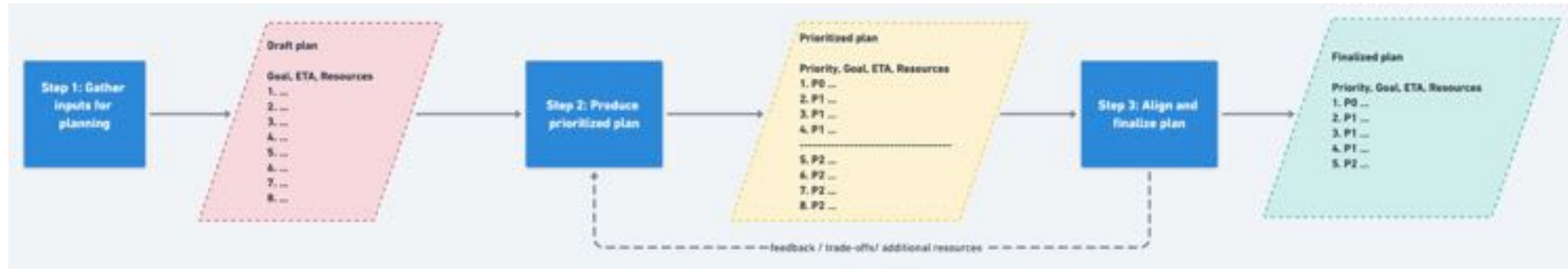2. Achieve buy-in
3. De-risk execution

What is planning?

Plan = outcomes, timelines and resources

When to plan?

Company planning	Annual / Bi-annual

Org/team planning	Quarterly

How to plan?

Step 1: Gather inputs for planning

Draft plan

Goal, ETA, Resources
1. ...
2. ...
3. ...
4. ...
5. ...
6. ...
7. ...
8. ...

Step 2: Produce prioritized plan

Prioritized plan

Priority, Goal, ETA, Resources
1. P0 ...
2. P1 ...
3. P1 ...
4. P1 ...
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5. P2 ...
6. P2 ...
7. P2 ...
8. P2 ...

Step 3: Align and finalize plan

Finalized plan

Priority, Goal, ETA, Resources
1. P0 ...
2. P1 ...
3. P1 ...
4. P1 ...
5. P2 ...

feedback / trade-offs/ additional resources

Step 1: Gathering inputs for planning

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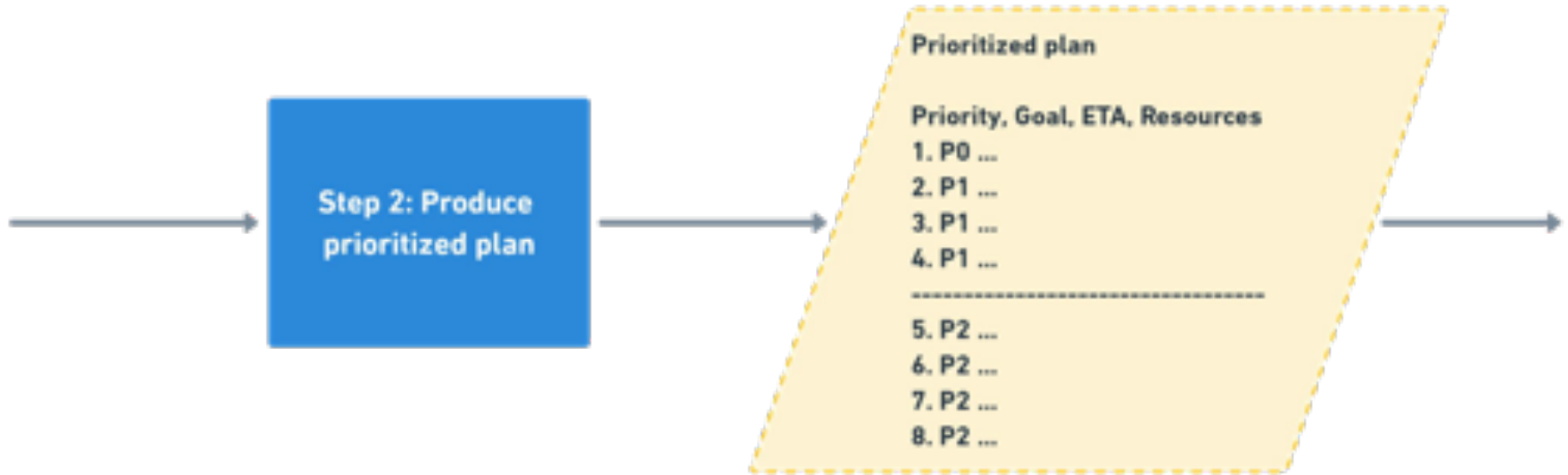
Draft plan

Goal, ETA, Resources
1. ...
2. ...
3. ...
4. ...
5. ...
6. ...
7. ...
8. ...

Step 1: Gather inputs for planning

- Backlog
- Strategy
- Users
- Internal teams

Step 2: Producing prioritized plan

Step 2: Produce prioritized plan

Prioritized plan

Priority, Goal, ETA, Resources
1. P0 ...
2. P1 ...
3. P1 ...
4. P1 ...
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5. P2 ...
6. P2 ...
7. P2 ...
8. P2 ...

Step 2: Producing prioritized plan

- Business value
- Non-negotiables
- Sustainability

Step 3: Aligning and finalizing plan

Step 3: Align and finalize plan

Finalized plan

Priority, Goal, ETA, Resources
1. P0 ...
2. P1 ...
3. P1 ...
4. P1 ...
5. P2 ...

Step 3: Aligning and finalizing plan

- Buy-in from leadership
- Dependencies on other teams

Measuring effectiveness of your plan

- Did your plans change over the course of the quarter?
- Did you hit your goals?
- Was the team oversubscribed or undersubscribed?

Stay nimble!

Recap

- Why
  - Set north-star
  - Achieve buy-in
  - De-risk execution
- When
  - Typically quarterly at team/org level
- How
  - Gather inputs for planning
  - Produce prioritized plan
  - Align stakeholders and finalize plan