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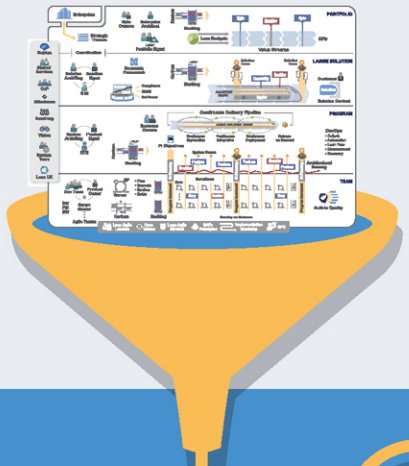

SAFe® DISTILLED

APPLYING THE SCALED AGILE FRAMEWORK® FOR LEAN ENTERPRISES

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SAFe® 4.5 Distilled

Teams also ensure that the program board (covered later) is updated with all features and cross-team dependencies. In addition, teams consolidate program risks, impediments, and dependencies. As on day 1, the planning SoS convenes hourly to ensure that the teams and plans are ready for the final review.

Team PI Objectives

Toward the end of the planning session, the teams focus on negotiating the final PI objectives with Product Management and Business Owners. Team PI objectives are brief summaries, *expressed in business terms*, of what the teams are prepared to commit to during the PI.

THE ROLE OF PI OBJECTIVES

Eric Willeke, SAFe Fellow, shares his experience with PI objectives as an Enterprise Agile Transformation Coach: "SAFe's use of PI objectives provides a unique tool to create an immediate feedback loop from the teams back to the Business Owners, allowing a quick validation of the teams' grasp of the desired outcomes. In short, we give the teams the following challenge: 'Can you concisely convey, in words the Business Owner understands, the essence of the value implementing this set of features would accomplish?' By asking the teams to summarize the intent and the outcomes they believe the Business Owner wants to achieve, we close the loop of understanding and drive crucial conversations that expose these misunderstandings."

Use Stretch Objectives

Stretch objectives help improve the predictability of delivering business value. The work is planned but is *not* included in the team's commitment. Stretch objectives are used to identify work that can be *variable* within the scope of a PI.

Stretch objectives help avoid loading the teams with more work than they can do. There are two key reasons for categorizing an objective as stretch:

- The team has low confidence in its ability to meet a PI objective.
- The objective has many unknowns. In this case, the team should plan spikes early in the PI to reduce uncertainty.

However, teams agree to do their best to deliver the stretch objectives, and they are included in the capacity for the PI. Since these objectives might not be finished in the PI, stakeholders plan accordingly.

Establish Business Value

The primary evaluation tool of the ART is a predictability *measure* that tracks the percentage of business value achieved for each PI objective in the plan. To execute this, the Business Owners set the business value of each objective toward the end of the PI planning session, as shown in Figure 7-8.

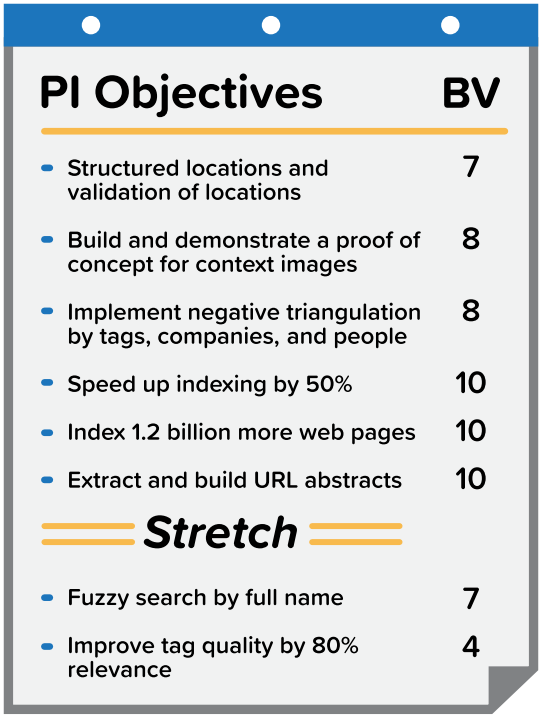

Figure 7-8. Setting business value for team PI objectives

Naturally, not all objectives deliver equal value, and Business Owners are likely to assign higher numbers to externally visible objectives than they would to infrastructure accomplishments and architectural epics. During PI execution, the teams use the Business Owner's rankings to make local trade-off decisions and minor scope adjustments in ways that deliver the maximum value to the business.

Program Board

Typically, the RTE creates a program board in advance of planning and teams update it during planning. The board highlights the feature delivery dates, milestones, and dependencies among teams and with other ARTs, as shown in Figure 7-9.

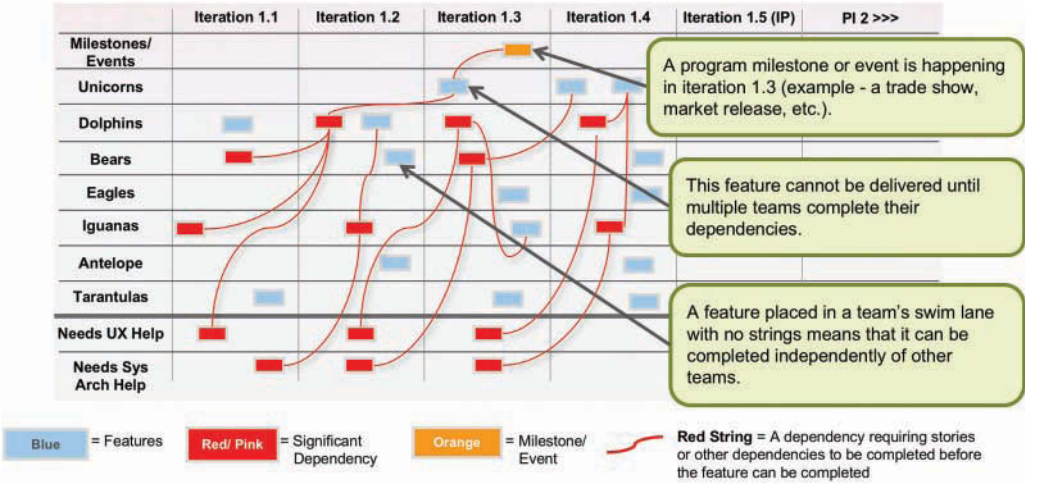

Figure 7-9. Program board example

THE ORIGIN OF THE PROGRAM BOARD

Drew Jemilo, SAFe Fellow and co-founder of Scaled Agile, Inc., describes how the Program Board came about: "After the first day of PI planning, each team's iteration plans were filled with user stories, and had many red stickies. It was painfully obvious that these 'red' dependencies were killing us, even though we couldn't visualize their true impact.

"When we learned that more than half of the PI objectives were stretch, tempers flared. By chance, I stumbled across a random box with red yarn and other supplies. Then it suddenly hit me, and I ran back with the yarn. We plastered the walls with blank flipchart paper, drew a swim lane for each team, and began mapping our feature dependencies with the yarn. Within an hour, our dependencies resembled a large, chaotic spider web. Craig, the pony-tailed System Architect, said, 'Now you know why we can't get anything done!' Jim, the Product Manager, exclaimed, 'I never knew how many dependencies we had just to get some new features done.' That was the birth of the Program Board (and the architect with the pony tail) on the Big Picture.'

Final Plan Review

Figure 7-10 shows a sample agenda for the final plan walk-through. This is basically a repeat of the draft plan review session from the day before, but by now the teams will have completed their plans.

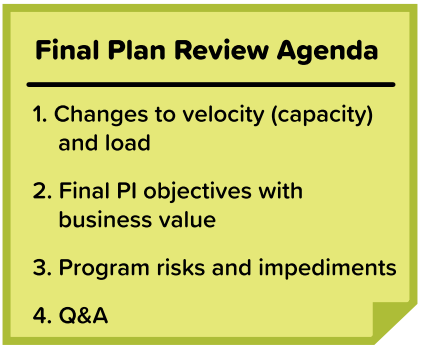

Figure 7-10. Final plan review agenda

At the end of each team's time slot, each team states its remaining program risks and impediments; these risks will be addressed later. Next, there is a brief Q&A for the ART and Business Owners. The facilitator asks the Business Owners if the plan is acceptable to them. If it is, the team brings its team PI objectives sheet and remaining program risks sheet to the front of the room. This allows everyone to see the summary of PI objectives unfold in real time. This process continues until all teams have presented their plans.

Addressing Program Risks and Impediments

Even though the plans are now complete, there is still work to do. During the planning, teams were asked to identify the most critical program risks and impediments—the very issues that could affect their ability to meet their agreed-to objectives. Addressing them is vital, as they typically represent things that—left unaddressed—may interfere with the success of the next PI.

ROAMing the Risks

By now, the teams will have addressed the risks that are under their local control. However, the remaining program risks and impediments will need to be addressed in a broader, management context. Every team's program-level risks will be discussed in front of the entire group. Each item is briefly discussed and placed in one of the following ROAM categories:

- *Resolved*. The teams agree that the issue is no longer a concern.
- *Owned*. Someone on the train takes ownership of the item since it cannot be resolved at the meeting.
- *Accepted*. Some risks are just facts or potential problems that must be understood and accepted.
- *Mitigated*. Teams can identify a plan to reduce the impact of an item.

The Commitment

After all the risks have been categorized, it's now time to ask the teams how confident they are about meeting the PI objectives. The teams vote using a 'fist of five,' as shown in Figure 7-11, where one finger equals very low confidence and five fingers represents very high confidence.

Figure 7-11. Fist of five confidence vote

If the average is three or more fingers, management should accept the commitment. However, if the average is less than three, then it's likely that the persons with low confidence have valuable insights into problems with the plan. Scope and resources will need further adjustment, and planning continues until a commitment is reached that day, or even into the evening, or is resumed the next morning.

A Commitment in Two Parts

Leadership must create a culture in which risk-taking *and* commitment are both part of the norm. Given this context, teams can interpret the confidence vote as a commitment. But this commitment has two parts:

1. Teams commit to do everything reasonable to meet the agreed-to objectives.
2. In case the facts change, or new learning occurs that indicates achieving the committed objectives is no longer possible, teams agree to escalate the issue immediately to inform management and initiate corrective action.

In this way, teams learn that they can and should take reasonable risks and also commit to an outcome, knowing that management is fully supportive of this model.

THE VALUE OF THE CONFIDENCE VOTE

Carl Starendal, SPCT at Scaled Agile, Inc., shared his experience about the importance of confidence vote: "During the confidence vote, almost everyone had raised either three, four, or five fingers. However, there was a single person with a one as his confidence (one of the testers), indicating that he did not believe in the plan. I asked him to share his concerns, and he told everyone that the most important feature would not be deployed successfully as the other's team plan did not include performance testing. The tester had information that there would be a drastic increase in the number of users for that specific system mid-PI. The team had been unaware of this and had not planned for it. After a short 20-minute replanning for that team, the ART had a much better plan that everyone believed in."

Planning Retrospective

The next event is a brief retrospective of the PI planning session led by the facilitator. Figure 7-12 shows a simple format to capture the results, along with a few example comments. This session should last no longer than 15–20 minutes. Near the end of that timebox, the facilitator may ask the teams to rank the items in the third column (what we could do better next time) to focus on process improvements for future planning sessions.

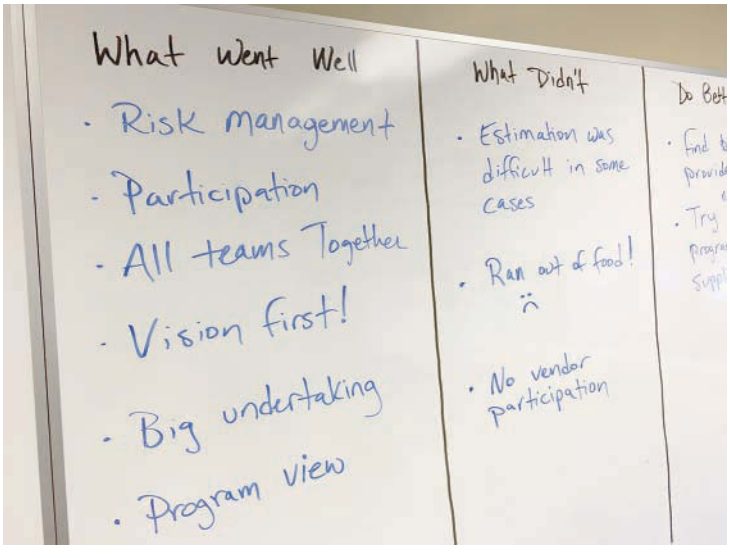

Figure 7-12. Method for capturing results during planning retrospective