BUILDING A FAST, FLEXIBLE FLOW

USING SAFe® 4.0 LEAN AGILE PORTFOLIO MANAGEMENT

Presented by
Jean Dahl  MBA, CSP, PMP, PMI-ACP, SPC

SAFe® is a registered trademark of Scaled Agile, Inc.
We will discuss the following topics:

- Portfolios and Value Streams
- Strategy! — The Driving Force Behind Your Portfolio
- Evolving the PMO in the Context of SAFe®
- Getting Started: 10 Steps to building your Initial Backlog
- Q&A/Wrap-up
JEAN DAHL: VP-GLOBAL PORTFOLIO DELIVERY, LexisNexis

Summary

- Jean is Vice President of Global Portfolio Delivery for LexisNexis Legal and Professional division where she is leading a 2000-person global Lean Agile + DevOps Transformation. She works closely with the business, global Product Management, and the Global Technology Organization to ensure a well-balanced transformation. She is responsible for the $140M New LexisNexis Global Portfolio & manages a staff of 50 portfolio and program mangers, as well as portfolio support staff.

- She has more than 25-years of experience both selling and delivering transformation initiatives in both the private and public sectors, including banking, financial services, insurance, retail, travel & hospitality, utilities, communications, and life sciences. She has managed projects, programs, and portfolios ranging in $5M to $200M, with teams from 50 to 700 during her career for companies, such as Fidelity Investments, Southwest Airlines, Target Corporation, and USAA to name a few.

- She is an industry recognized Lean Agile thought leader, speaker, and regularly publishes on Agile Best Practices, as well as being a Lean Continuous Improvement, Scaled Agile Framework (SAFe®), and DevOps transformation expert.

- She is very active in the Agile community and has chaired the Agile Alliance Executive Forum; the Project, Program, and Portfolio track; and the Culture, Collaboration, and Teams track for the annual Agile Alliance conference.

Education & Certifications

- Master of Business Administration (MBA)–University of Texas. Major: Organizational Behavior. Minor: Accounting
- Bachelor of Science (BS)–University of Wisconsin. Major: Finance
- Scaled Agile Framework (SAFe®) Process Consultant (SPC)-Scaled Agile Academy (Trained by Dean Leffingwell-Creator)
- PMI Agile Certified Practitioner (ACP)–Since June 2013
- Project Management Professional (PMP)–Since May 2000
- Professional Scrum Master (PSM)–Scrum.org (Through Sabre Airline Solutions)
- Lean Six Sigma Master Black Belt (LSSMBB)–Cisco Systems Black Belt Certification program
- Adjunct Professor–Southern Methodist University-School of Engineering. Project Management Certification Program
PORTFOLIOS AND VALUE STREAMS
LEVERAGING THE SAFE® FRAMEWORK

SAFe® is a freely revealed knowledge base of integrated, proven patterns for enterprise lean Agile development.

Portfolio/Value Stream Key Benefits
- Closer alignment of IT with business
- Better IT governance
- Cost reductions and productivity increases
- Business-based decision making
- More predictable program outcomes
DEFINITIONS

- **Portfolio**
  - Project Management Institute (PMI) defines a portfolio as a collection of initiatives, projects and/or programs grouped together to facilitate effective management of that work to meet strategic business objectives.
  - It consists of a set of current components and planned or future initiatives that can be measured, ranked, and prioritized.
  - Proposed initiatives become part of the portfolio when they are identified, selected, and/or approved.
  - They aren’t temporary and organizations may have multiple portfolios, each addressing unique business areas or objectives.

- **Value Stream**
  - Represents a mechanism to organize very large and complex solutions that require multiple Agile Release Trains (ARTs)
  - Are optional in nature (3-level vs 4-Level SAFe®)
  - Contains an Economic Framework that provides financial boundaries for decision making
  - Consists of the Solution Intent (intended & actual solution behavior), Solution Context (deployment characteristics) and Capabilities (larger solution behaviors) that are all components of the Value Stream layer
  - Provides for cadence and synchronization of multiple ARTs and suppliers, including Pre & post PI-Planning meetings and Solution Demos

- **Portfolio Management (PfM)**
  - Portfolio Management is a strategy
  - Enables integrated management of pipeline, scope, time, resource, skills, cost, procurement, communication, reporting and forecasting, and risk management functions
  - Aligns business objectives and initiatives to Product Management and Technology resources
  - Creates a vehicle that ensures teams are working on requests that are of the greatest value to the business and to the organization
  - Provides transparency for all of it’s stakeholders so they are aware of the priority and flow of all work
  - Limits Work in Process (WIP) by managing resource capacity that guards against bottlenecks, creating a fast, flexible flow within the program
The beauty of SAFe® is that it scales to whatever level you need, no matter the size and complexity.
TRIFECTA OF TRANSFORMATION

In SAFe®, all three of these groups are represented, and their participation is assumed. Invest the time in understanding the success factors for each group, and then socializing your strategy and change management plan to gain buy-in & approval.

Whether you choose to implement SAFe® or some other scaling method...

Your chances of success increase if you can get all three stakeholder groups onboard... or as we say in SAFe®... on the train!
STRATEGY—THE DRIVING FORCE BEHIND YOUR PORTFOLIO
LINKING STRATEGY TO VALUE CREATION WITHIN SAFe®

SAFe® Hierarchy

- Strategic Themes
- Epics & Enablers
- Capabilities & Enablers
- Features & Enablers
- User Stories
- Tasks

Responsible Role

- Business Owners
- Product Management & Enterprise Architecture
- VSE (Portfolio Manager) & Solutions Management
- RTE (Program Manager), Product Mgmt & Solutions Architect
- Product Owner-FRs
- Team-NFRs
- Team
Minimum Marketable features (MMFs) defined:

- A minimum marketable feature is the smallest amount of functionality that makes sense to market.
- Used to determine which features can be quickly delivered

Users understand about 20-25% of their business domain

- Key insight: Start with what the user knows first!

Cycle then becomes...

- Build a little, show them, gain more clarity, and repeat
- Best way to address constantly changing requirements

To mitigate the risk of uncertainty

- Agile prescribes short iterations with lots of feedback
- As customers learn more about what the system looks like & what it can do
- They get clearer ideas about what they really need and can ask for it more precisely
- Design emerges with experience over time
END RESULT: THE ROADMAP

**May**
- **PI 1**
  - Road Rage Ported (part I)
  - Brickyard port started (stretch obj. to complete)
  - Distributed platform demo
  - ALL GUIs for both games demonstrable
  - New features (see prioritized list)
    - Stretch Objectives —
    - Demo of Beemer game

**July**
- **PI 2**
  - Road Rage Completed (single user)
  - Brickyard Ported (single user)
  - Road Rage multiuser demonstrable
  - First multiuser game feature for Road Rage

**Sep**
- **PI 3**
  - Road Rage (Multiuser) first release
  - Brickyard Ported multiuser demo
  - New features for both games (see backlog)

**High Confidence**

**Medium Confidence**

**Marquee Features Only**
EVOLVING THE PMO IN THE CONTEXT OF SAFe®
To ensure the portfolio runs smoothly, the Lean Agile PfMO must provide six key services. All of which must be balanced and running in an iterative and incremental manner.

- Strategy & Investment Funding
- Program Management
- Governance

SAFe® states that PPM represents those individuals who have the primary responsibility for...

**SIX PORTFOLIO MANAGEMENT (PfM) COMPONENTS**
LEAN AGILE PORTFOLIO MANAGEMENT

1. Funnel
- Complete Intake Questionnaire for:
  - New business ideas
  - R&D Initiatives
  - “End of Life” initiatives
  - Cost savings
  - Problems with existing solutions
  - Mergers & Acquisitions
  - Submit questionnaire

2. Review
- Review Intake Questionnaire
- Evaluate strategic & technical fit
- Create Epic value statement
- Calculate Business Value
- Score Intake Questionnaire
- Route for Tech. Review
- Define capacity demand

3. Analysis
- Define Solution alternatives
- Match to capability
- Identify features and estimate Ideal Story Points
- Build business case
- Calculate ROI & Payback
- Determine budget and WIP impact, if approved
- Perform global harmonization (if necessary)
- Make go/no go decision

4. Portfolio Backlog
- Hold epics ready for implementation until there is capacity available
- Prioritize Epics based on Business Value
- Continuously groom the backlog when new Epics are approved
- Release to Program Backlog based on capacity, vision, & product roadmap

5. Program Backlog
- Conduct Pre PI Planning to slot Features & Enablers into the proposed PI roadmap based on WIP limits
- Calculate target velocity
- Conduct PI planning sessions to validate
- Decompose Features and Enablers into User Stories

5. Implementation
- Teams begin implementing at release planning boundaries
- Teams validate and point User Stories
- Tasks are created
- WIP limited queuing based “on pull”
- RTEs conduct SoS
- PFM reports progress out to stakeholders
DEMAND MANAGEMENT

- Initiation
- Planning/Prioritization
- Global Product Harmonization

IPPT
IPPT & PMC
GPC
GOVERNANCE MODEL

Executive Review Board (ERB)
- **Purpose:** Responsible for the portfolio as a whole and reviews and approves strategic initiatives greater than $1M
- **Chair:** CEO
- **Level:** C Suite & VPs from the Business, Product Management, and Technology
- **Facilitator:** VP-Portfolio Mgmt
- **Meeting Frequency:** Quarterly (Monthly for the first 3-6 months)

Global Product Council (GPC)
- **Purpose:** Responsible for global product direction & harmonization. Develops & maintains global product strategy, mission, vision, & roadmap
- **Chair:** CPO
- **Level:** C Suite & VPs from Product Management and Technology
- **Facilitator:** VP-Portfolio Mgmt
- **Meeting Frequency:** Monthly

Product Management Committee (PMC)
- **Purpose:** Evaluates proposed Epics & Features based on the Product Strategy & Roadmap
- **Level:** Director/Sr Directors from the Product Mgmt, Technology, & Portfolio teams
- **Facilitator:** Sr Director-PM
- **Meeting Frequency:** Bi-Weekly

Initiation, Planning, & Prioritization Team (IPPT)
- **Purpose:** Provides initiation, planning, and prioritization support for proposed Epics/Features
- **Level:** Leads to Sr Manager from the Product Mgmt and Technology
- **Facilitator:** Sr Mgr-IPPT
- **Meeting Frequency:** Weekly

Agile Release Trains (ARTs)
PRIORITIZING WORK BASED ON BUSINESS VALUE

Example:

**Ability to Accept PayPal Payments**
- New Business = 60
- Upsell Opportunity = 0
- Retainment = 10
- Save Money = 40
- Customer Satisfaction = 90
- Compliance = 0

Total is 200 = Med High Priority
If total falls between levels, we contrast with others to determine final scoring.

<table>
<thead>
<tr>
<th>Considerations</th>
<th>New Business (x2)</th>
<th>UPSell Opportunity (x2)</th>
<th>Saves Money (x2)</th>
<th>Retainment (x1)</th>
<th>Compliance (x1)</th>
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</table>

- **Considerations**
  - How many customers requested this? Did we commit to it?
  - How many issues do we have as a result of not having this?

- **Considerations**
  - Will we capture new market share?
  - How much revenue does it generate?
  - How quickly is the ROI realized?

- **Considerations**
  - How much money does it save?
  - How quickly is the ROI realized?

- **Considerations**
  - How many customers will we avoid losing?
  - How quickly is the ROI realized?

- **Considerations**
  - Is this mandatory?
  - Due by when?
  - Are there legal implications?
  - Any penalties if not done?
MATCHING INVESTMENT SPENDING TO THE FLOW OF WORK

Example capacity baseline: 1 ideal day = 1 point

<table>
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<tr>
<th>POINTS</th>
<th>Per Day</th>
<th>Monthly 4 week sprints</th>
<th>Quarterly</th>
<th>Total Budget</th>
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<tbody>
<tr>
<td>POINTS</td>
<td>Example: 10 teams of 10 people: 10 x 10 = 100 pts</td>
<td>22 business days: 22 x 100 pts = 2200 pts</td>
<td>Each month 2200 pts 2200 x 3 months = 6600 pts</td>
<td>$75/hr x 8 = $600/day x 6600 pts</td>
</tr>
<tr>
<td>POINTS</td>
<td>100 pts x 8 (ideal day) = 800 hrs</td>
<td>2200 pts x 8 (ideal day) = 17,600 hrs</td>
<td>6600 pts x 8 (ideal day) = 52,800 hrs</td>
<td>52,800 x 75/hr = $3.96M per Quarter</td>
</tr>
</tbody>
</table>

Example:
- 10 teams of 10 people: 100 pts
- 22 business days: 2200 pts
- Each month 2200 pts
- Total Budget: $3.96M per Quarter

HOURS
- 100 pts x 8 (ideal day) = 800 hrs
- 2200 pts x 8 (ideal day) = 17,600 hrs
- 6600 pts x 8 (ideal day) = 52,800 hrs
- Total Budget: $3.96M per Quarter

Ideal Day: 8 hours

$900K

ART #1 Epics for R1 Backlog
- 1,600 hrs
- 2,400 hrs
- 1,200 hrs
- 1,600 hrs
- 2,000 hrs
- 800 hrs
- 2,400 hrs
- Or
- 200 pts
- 300 pts
- 150 pts
- 200 pts
- 250 pts
- 100 pts
- 300 pts
- 12,000 hrs
- 1,500 Pts

Prioritization & Backlog Management

Agile Release Train #1
- Scrum Team (7 members ± 2)
- Developer(s)
- Architect(s)
- Business Analyst(s)
- QA Analyst(s)
- UX Analyst(s)

Agile Release Train #2
- Scrum Team (7 members ± 2)
- Developer(s)
- Architect(s)
- Business Analyst(s)
- QA Analyst(s)
- UX Analyst(s)

Agile Release Train #3
- Scrum Team (7 members ± 2)
- Developer(s)
- Architect(s)
- Business Analyst(s)
- QA Analyst(s)
- UX Analyst(s)

ART #2
ART #3
ART #1
ART #n+1

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PRIORITIZING THE FLOW OF WORK

Earning Business Value: Prioritize and develop the highest value features first...

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<th>Epic 1</th>
<th>10</th>
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<th>30</th>
<th>50</th>
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1750/2000 BVPs earned 88% earned

Estimate = 1,800

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110/130 SPs earned 85% complete

Estimate = 120

Total Revenue for the Epic: 2,000 Business Value Points x $200/BVP = $400,000
Total Cost for the Epic: 130 Story Points x 8 = 1,040 hour x $75/hr = $78,000
CALCULATING BUDGETED VS ACTUAL COST PER EPIC

Total Cost of the Epic:
• Budgeted = 120 Story points
  $72,000
• Actual = 130 Story Points
  $78,000
• Percentage completed: 85%
  85% complete

Total Spend to date: $66,300
Forecast to Complete: $11,700

110/130 SPs earned
85% complete
Estimate = 120
# DETERMINE TEAM COMPOSITION PER ART

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<thead>
<tr>
<th>Roles</th>
<th>Triumph</th>
<th>Timesters</th>
<th>Frontline Reporters</th>
<th>OTM</th>
<th>Divergent</th>
<th>Ropers</th>
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<td><strong>Product Owner</strong></td>
<td>Bart Thomas</td>
<td>Tom Jones</td>
<td>Bill Jobbs</td>
<td>Sandra Fletcher</td>
<td>Raj Khan</td>
<td>Tom Daley</td>
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<td><strong>UX</strong></td>
<td>James Wood</td>
<td>Brian Washington</td>
<td>Mohamed Abdul</td>
<td>Linda Thompson</td>
<td>John Johnson</td>
<td>Lucy Wong</td>
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<td><strong>Business Analyst(s)</strong></td>
<td>Leslie Bryan</td>
<td>Jose Garcia</td>
<td>Rachel Coop</td>
<td>Vickie Wagner</td>
<td>Jeannette Wilkins</td>
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<td>Lynda Davis</td>
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<td>Donna Barnes</td>
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<td><strong>Developer(s)</strong></td>
<td>Tommy Chow</td>
<td>Tony Hernandez</td>
<td>Rajeev Kumar</td>
<td>Snehal Patel</td>
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<td><strong>Total Team Members</strong></td>
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## ART1 Resource, Capacity, & Velocity Model Per Sprint

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<th>Triumph</th>
<th>Timesters</th>
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<td>4</td>
<td>5</td>
<td>3</td>
<td>4</td>
<td>25</td>
</tr>
<tr>
<td>Testers</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>12</td>
</tr>
<tr>
<td><strong>Total Team Members</strong></td>
<td><strong>9</strong></td>
<td><strong>9</strong></td>
<td><strong>8</strong></td>
<td><strong>9</strong></td>
<td><strong>7</strong></td>
<td><strong>9</strong></td>
<td><strong>51</strong></td>
</tr>
</tbody>
</table>

**Capacity Hrs per Sprint**

(#{TMs x 8 hrs * 15 days})

- **UX**: 1,080 hrs
- **BA**: 1,080 hrs
- **Developers**: 960 hrs
- **Testers**: 1,080 hrs
- **Total Team Members**: 6,120 hrs

**Ideal Velocity:**

- Total story points per sprint
- (1 sp = 8-hour day)

- UX: 135
- BA: 135
- Developers: 120
- Testers: 135
- Total: 780

**Actual Velocity:**

- S15 Committed/Actual

- UX: 120/115
- BA: 120/119
- Developers: 120/130
- Testers: 130/130
- Total: 703/693

**Average Velocity**

- (Sprint 9-15)

- UX: 125
- BA: 120
- Developers: 125
- Testers: 140
- Total: 721

**R1 Backlog:**

- S17 SP's planned

- UX: 162
- BA: 125
- Developers: 130
- Testers: 130
- Total: 772

**Total WIP Limit/Sprint:** Ideal SP=780; Average SP=721
SAFE METRICS DASHBOARD

**Portfolio**
- Net Promoter Score
- Epic/Feature Cycle Time
- Self Assessment
- Number of Releases/year
- Defect Data & Support Call Volume

**Program**
- Program Velocity
- # of SP Features, Enablers, Stories Planned vs Accepted
- Unit Test Coverage % & Defects
- Total Tests & % Automated
- # NFR Tests

**Value Stream**
- # SP Capabilities/Enablers Planned vs Accepted
- Unit Test Coverage %
- # Defects & Total Tests
- # NFR Tests
- % Automated

**Team**
- Velocity Planned vs Actual
- # Story Pts Planned vs Accepted
- Unit Test Coverage % & # Defects
- # New Test Cases & Total Tests Total & Tests Automated %
- # Refactors

---

**Portfolio Health**

“To achieve our goals, how will we sustain our ability to deliver and improve?”

**Program**

“To deliver value to our customers & organization, what must we accomplish?”

**Team**

“To achieve our goals, how should we organize and accomplish our work?”

---

**Team**

- Velocity Planned vs Actual
- # Story Pts Planned vs Accepted
- Unit Test Coverage % & # Defects
- # New Test Cases & Total Tests Total & Tests Automated %
- # Refactors
LEVERAGING SAFE® SELF ASSESSMENTS

Program Portfolio Management

- Program Portfolio Management Team
- Strategy & Investment Funding
- Governance
- Program Management
- Portfolio Metrics
- Budgets
- Value Streams
- Portfolio Kanban

Agile Release Trains

- Planning Readiness
- Release Planning Event
- PI Execution
- PI Results
- Inspect & Adapt
- Stakeholder Engagement
- Total Portfolio Alignment Score

Teams

- Product Ownership Health
- PI Release Health
- Sprint Health
- Team Health
- Technical Health
REPORTING: PORTFOLIO, PROGRAM, AND TEAM

Metrics & Reporting
ROLES AND RESPONSIBILITIES

VSE
Provides oversight at the Value Stream level

Enterprise Architect
Drives the overall technical vision & architectural runway “The WHEN”

Product Manager
Acts as the Content Authority “The WHAT”

RTE
Provides oversight of the ART at the Program level

System Architect
Ensures system is being developed per the architectural runway

Scrum Master
Provides guidance & coaching to the Scrum teams

Product Owner
Acts as Customer Proxy “The WHO”

Enterprise Architecture
Responsible for Solution Intent “The HOW”

Product Management
Represents the Content Authority “The WHAT”

Portfolio Management Team
Responsible for Strategic Planning, Investment Funding, Program Management, & Governance “The WHERE”

Business Owners
Provides business strategy and context for the ARTs

The ‘WHERE’
Enterprise Architecture
Represents the Content Authority

The ‘WHAT’
Portfolio Management Team
Executes the vision and context

The ‘WHEN’
Business Owners
Drives the overall technical vision & architectural runway

The ‘WHO’
Product Owner
Acts as Customer Proxy
## PORTFOLIO (VSE) & PROGRAM (RTE) MANAGEMENT

<table>
<thead>
<tr>
<th>Role</th>
<th>Value Stream Engineer-VSE (Portfolio Manager)</th>
<th>Release Train Engr-RTE (Program Mgr)</th>
<th>Joint Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level</td>
<td>Value Stream</td>
<td>Program (Agile Release Train)</td>
<td>• Manages and optimizes the flow of value through the program using various tools &amp; information radiators</td>
</tr>
<tr>
<td>Interfaces</td>
<td>Internal, product and technology-facing</td>
<td>Internal, product and technology-facing</td>
<td>• Helps manage risks and dependencies</td>
</tr>
<tr>
<td>Reports to</td>
<td>Either the Business (CEO) or Development (CIO)</td>
<td>Value Stream Engineer</td>
<td>• Reports status to Program Portfolio Management and Release Management, and supports related activities</td>
</tr>
<tr>
<td>Owns</td>
<td>Value Stream Backlog</td>
<td>Program Backlog</td>
<td>• Understands and operates within the Portfolio and Program level Budgets</td>
</tr>
<tr>
<td>Focus</td>
<td>Facilitates the work of the Product Managers &amp; manages RTEs</td>
<td>Facilitates program-level execution</td>
<td>• Provides input on resourcing to address critical bottlenecks</td>
</tr>
<tr>
<td>Artifacts</td>
<td>Epics, Capabilities, Features, &amp; Enablers</td>
<td>Features/Enablers, User Stories &amp; Tasks</td>
<td>• Attends System Demos and Solution Demos</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Drives continuous improvement via Inspect and Adapt workshop</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Assesses the agility level of the program/value stream and help to improve</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Encourages team, program, and value stream levels Continuous Integration and Communities of Practice around SAFe®, Lean Agile, Engineering, and Quality practices</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Coaches leaders, teams, and Scrum Masters in lean Agile practices and mindsets</td>
</tr>
</tbody>
</table>

### Primary Responsibilities
- Acts as servant leader
- Assists the Business Owners in identifying and tracking Strategic Themes, as well as ensuring strategy execution & alignment
- Facilitates collaboration between the Product Management, Enterprise Architecture, and Solution Management
- Assists Product Management in grooming the Value Stream backlog
- Facilitates PI Planning readiness via fostering the preparation of Vision and backlogs, and via Pre and Post-PI Planning meetings
- Aggregates Program PI Objectives into VS PI Objectives; publishes them for visibility & transparency
- Acts with Epic/Capability/Feature creation and tracking
- Facilitates periodic synchronization meetings, including the VS sync at the VS level
- Facilitates feature and capability estimation by teams
- Rolls estimates up to the VS and portfolio levels
- Acts as servant leader & has a Pgm background
- Facilitate PI Planning at the team level
- Aggregates Team PI Objectives into Program PI Objectives (the RTE) and publish them for visibility and transparency
- Facilitates periodic synchronization meetings, including the ART sync at the Program level
- Runs the Scrum of Scrums for the ART
- Encourages collaboration between the teams and System and Solution architects, Engineering, and User Experience
- Assist with execution and User Story/Task completion tracking
GETTING STARTED: 10 STEPS TO BUILDING YOUR BACKLOG
GETTING STARTED: 10 STEPS TO BUILDING YOUR INITIAL BACKLOG

The following steps can be used to create your initial Backlog:

- **Step 1:** VSE schedules meeting and sends out meeting invitations to the Product Manager, Product Owner, RTE, and Enterprise Architect (EA)
- **Step 2:** VSE and Product Manager begin the meeting by:
  - Defining the Business Objective, Scope, Assumptions/Considerations, and Risks, Issues and Constraints for the Value Stream
  - Documenting the Strategic Themes
- **Step 3:** Define the User Roles by identifying the personas and their intended interactions with the system
- **Step 4:** Develop the Epics. For each, define the in and out of scope aspects, success criteria, NFRs, risks, and assumptions
- **Step 5:** Identify the Features under each Epic
  - Work with the EA to determine hours, then covert to Ideal Story Points and record the values associated with each Feature
  - Determine the business value and enter the points for each Feature
- **Step 6:** Total and roll up the Story Points and Business Value Points for each feature and record these values for each Epic
- **Step 7:** Conduct Pre PI-Planning and decompose the features into User Stories (functional)
- **Step 8:** Conduct PI Planning and use the team’s ideal velocity to determine how much work can be pulled into the next three PIs
- **Step 9:** Develop the PI Objectives and Roadmap
- **Step 10:** Summarize and enter the roadmap built during PI planning into your Agile Project Management or PPM tool
QUESTIONS?