Scaled Agile Framework (SAFe)

Lean Portfolio Management

# Encantada!

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- 22 Jahre Mitarbeiter der Firma Ericsson
- Mehrjährige praxisbezogene Erfahrung in der Anwendung von Lean und Agile Methodologien.
- Bekannt als Referentin in internationalen Agilen Veranstaltungen und Konferenzen (Aginext London, Agile Lean Irland, Business Analysis Day Frankfurt) sowie Keynote Speaker bei ExpoQA Madrid 2019.

✓ Management 3.0 Licensed Trainer
✓ Certified SAFe Program Consultant (SPC)
✓ Certified Professional Scrum Master
✓ PMI Agile Certified Practitioner
✓ IBQMI Certified Kanban Coach
✓ Certified LeSS Practitioner
✓ ICA – Business Agility Foundations

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Scrum

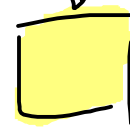Rodríguez Pardo & Assocs
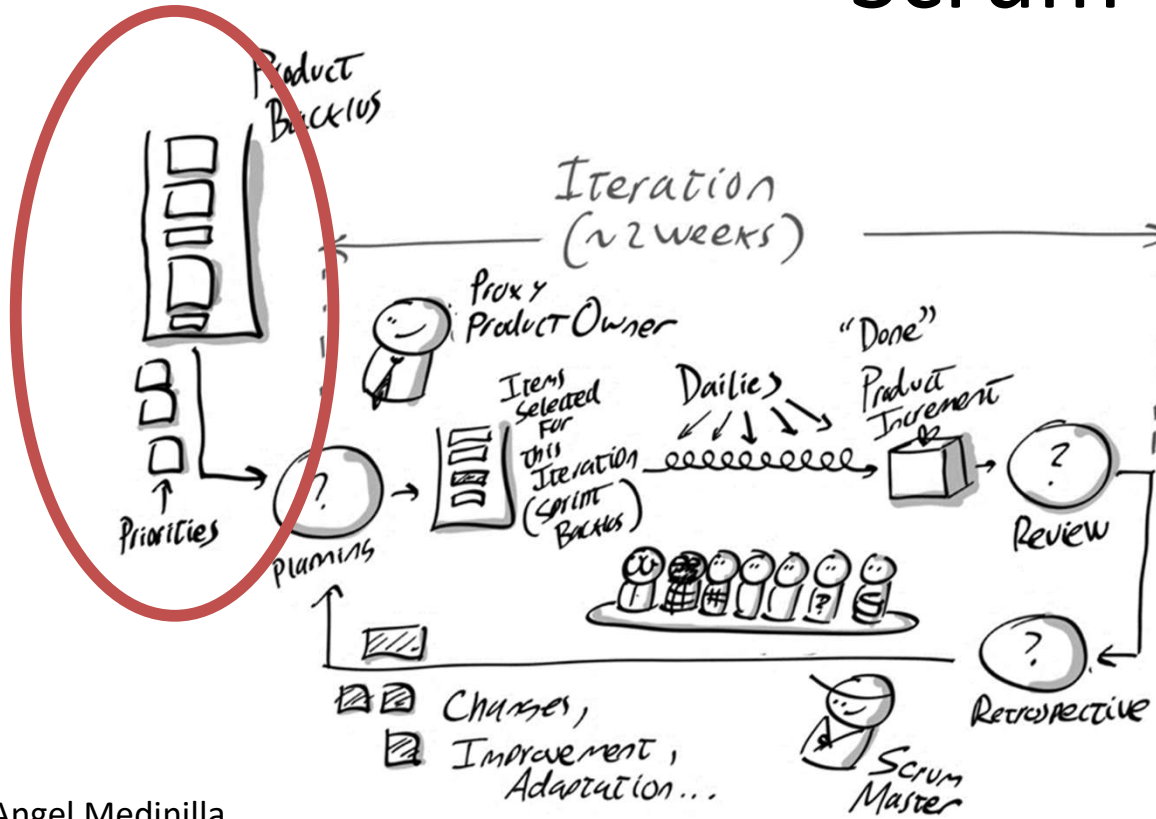
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Agile teams
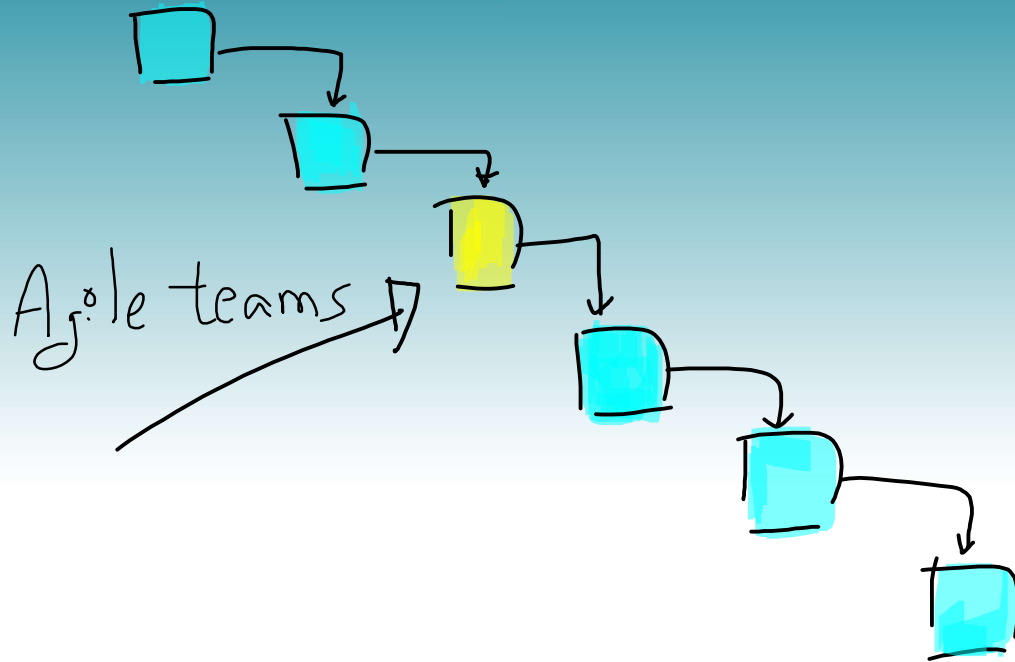
"Every business is a software business now. Agility isn't an option, or a thing just for teams, it is a business imperative. But we struggle building big systems. What's needed is a Lean Enterprise."

—Dean Leffingwell
Creator of SAFe
@DeanLeffingwell

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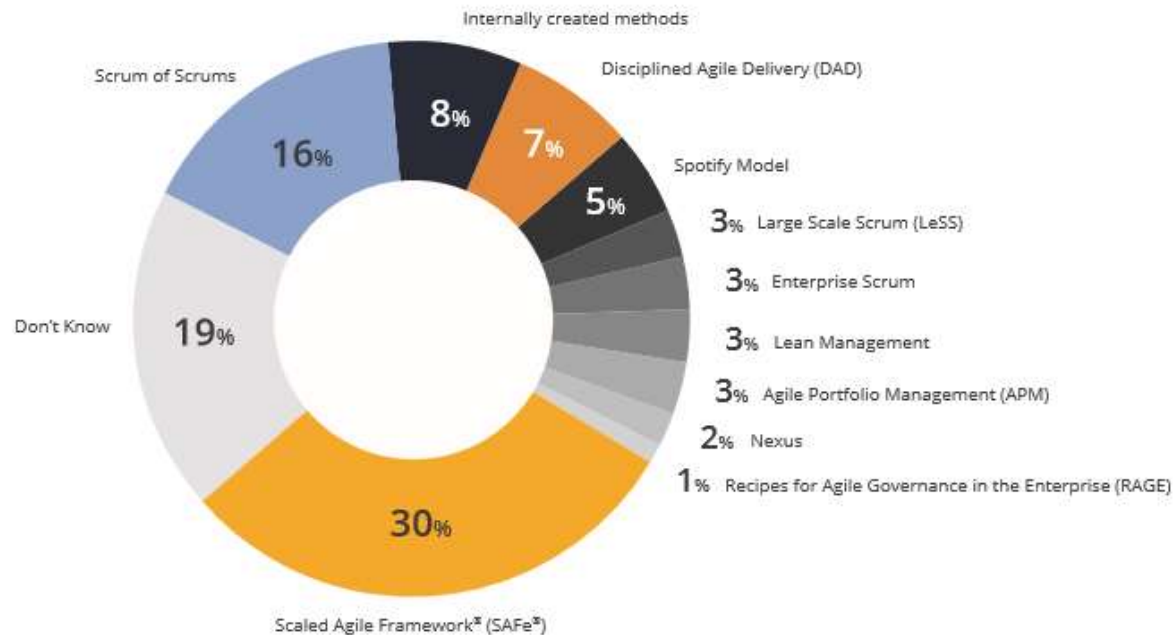**The world's leading framework for enterprise agility**

SAFe® for Lean Enterprises is a knowledge base of proven, integrated principles, practices, and competencies for Lean, Agile, and DevOps

www.scaledagileframework.com

SCALING AGILE

Scaling Methods and Approaches

The Scaled Agile Framework® continues to be the most popular scaling method cited by respondents (30% this year compared to 29% last year).
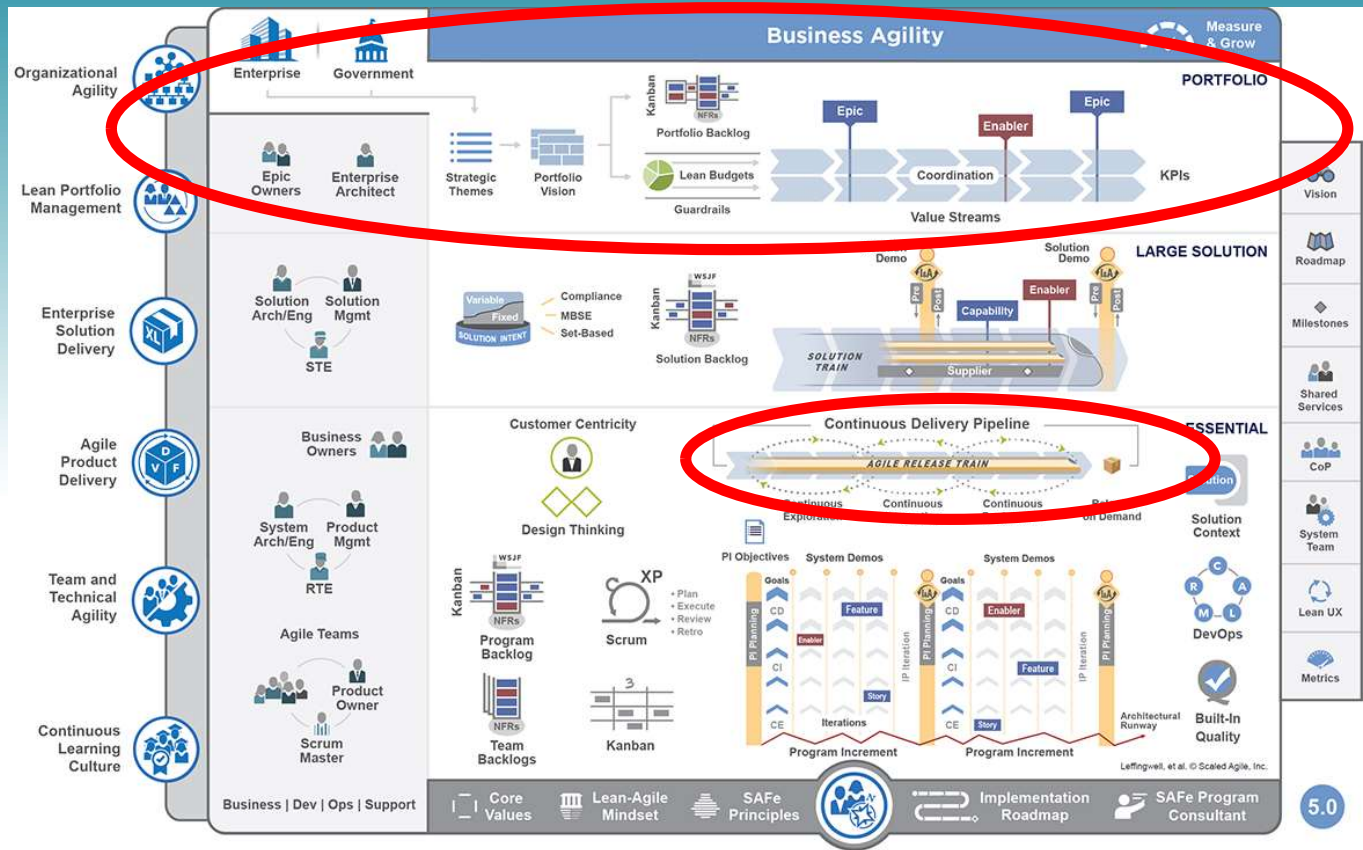
Internally created methods

Disciplined Agile Delivery (DAD)

Scrum of Scrums

8%

7%

Spotify Model

16%

5%

3% Large Scale Scrum (LeSS)

3% Enterprise Scrum

Don't Know

19%

3% Lean Management

3% Agile Portfolio Management (APM)

2% Nexus

1% Recipes for Agile Governance in the Enterprise (RAGE)

30%

Scaled Agile Framework® (SAFe®)

SAFe® 5.0 for Lean Enterprises

Agile teams

Requirements?

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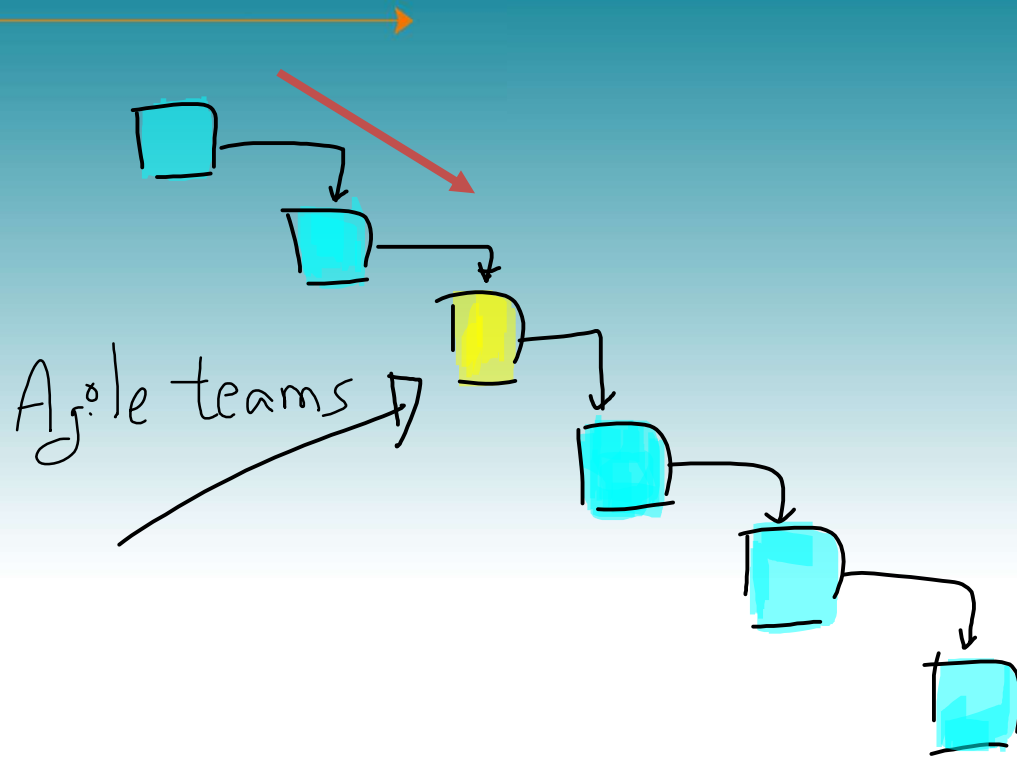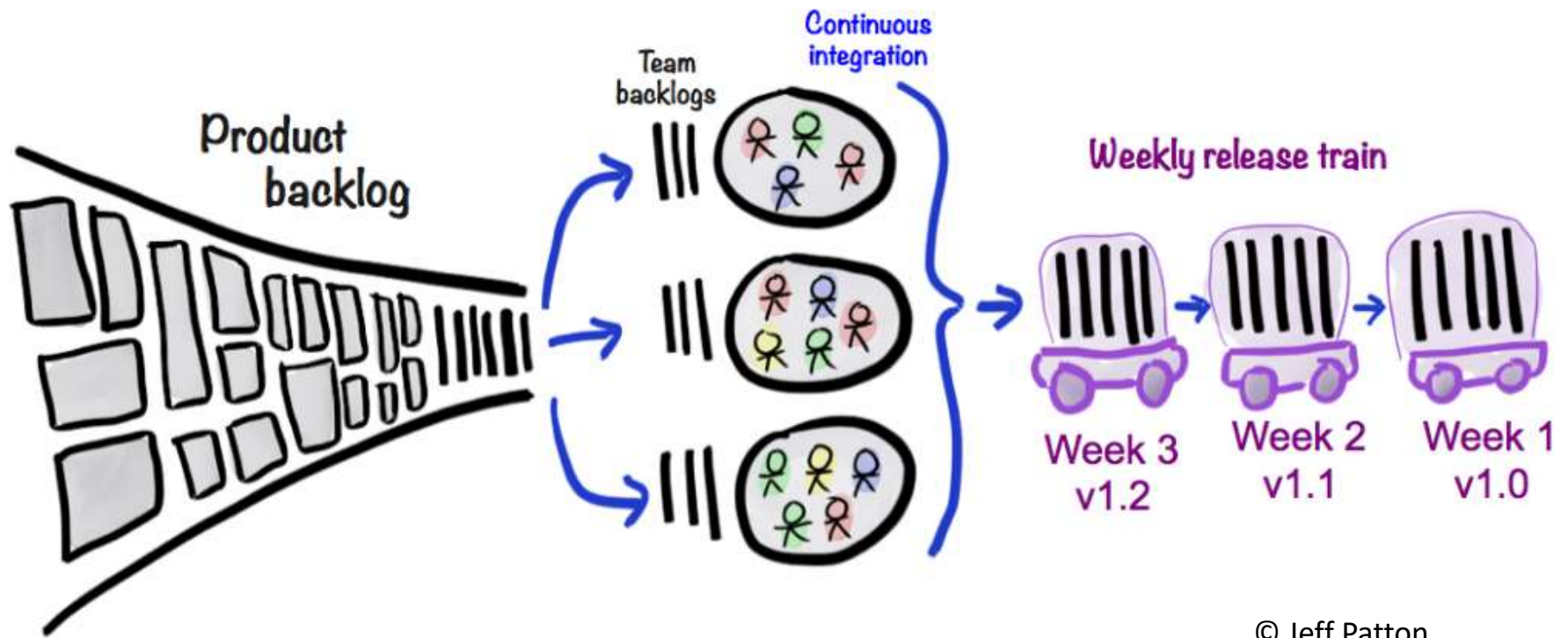
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Francesco del Giocondo, XV a.C.

Multiple teams working together

Product backlog

Team backlogs

Continuous integration

Weekly release train

Week 3 v1.2   Week 2 v1.1   Week 1 v1.0

© Jeff Patton

Agile Backlog Prioritization Technique

Mo — **MUST HAVE**
The most vital things you can't live without

S — **SHOULD HAVE**
Things you consider as important, but not vital

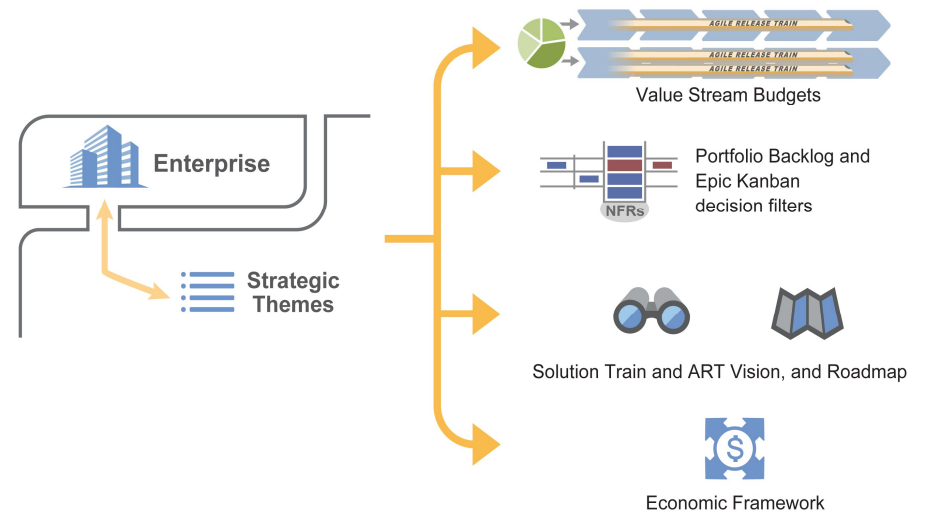**Co** — **COULD HAVE**
Things that are nice to have

W — **WON'T HAVE**
Things that provide little to no value you can give up on

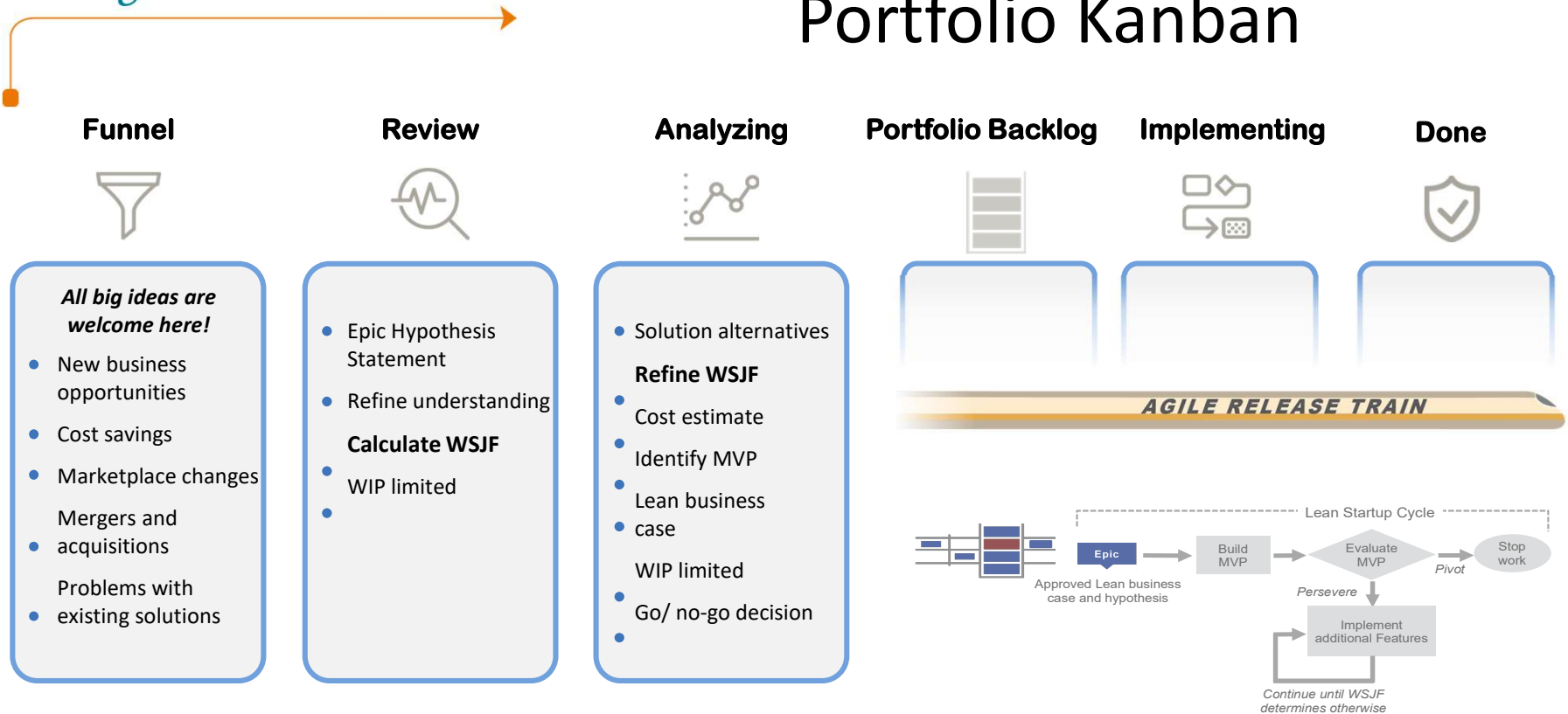# Strategic Themes influence what gets built

- Context for decision-making

- Affects value stream and ART budgets

- Inputs to the vision, budget, and backlogs

- Assist with Epic evaluation and decision-making

- Influence Program Vision and Roadmap

Value Stream Budgets

Portfolio Backlog and Epic Kanban decision filters

Solution Train and ART Vision, and Roadmap

Economic Framework

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Portfolio Kanban

Funnel	Review	Analyzing	Portfolio Backlog	Implementing	Done

Funnel

All big ideas are welcome here!

- New business opportunities
- Cost savings
- Marketplace changes
- Mergers and acquisitions
- Problems with existing solutions

Review

- Epic Hypothesis Statement
- Refine understanding
- **Calculate WSJF**
- WIP limited
-

Analyzing

- Solution alternatives
- **Refine WSJF**
- Cost estimate
- Identify MVP
- Lean business case
- WIP limited
- Go/ no-go decision
-

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AGILE RELEASE TRAIN

Lean Startup Cycle

Epic → Build MVP → Evaluate MVP → Stop work

Approved Lean business case and hypothesis

Persevere — *Pivot*

Implement additional Features

Continue until WSJF determines otherwise

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Lean Business Case

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Lean Business Case

Impact on Products, Programs and Services:

(Identify products, programs, services, teams, departments, etc. that will be impacted by this Epic)

Impact on Sales, Distribution, Deployment:

(Describe any impact on how the product is sold, distrib...)

Analysis Summary:

(Brief summary of the analysis that has been formed to... business case.)

Estimated Story Points (MVP):	**Estima...**
(Estimated story points for the MVP of the epic)	(Exampl... MVP f...)

Type of Return:	**Anticip...**
(Market share, increased revenue, improved productivity, new markets served, etc.)	(Reven...

In-house or Outsourced Development:

(Provide recommendations for where the Epic should b...

Estimated Development Timeline	**Start Date:**
	(Estimated start dat...

Incremental Implementation Strategy:

(Epics are defined as a single whole, but each epic unde... details on potential strategies. Many parts of this guida...

Sequencing and Dependencies:

(Describe any constraints for sequencing the epic and i...

Milestones or Checkpoints:

(Identify potential milestones or checkpoints for reeval...

Attachments:

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Lean Business Case

Epic Name:	**Funnel Entry Date:**	**Epic Owner:**
(Short name for the Epic)	(Date the Epic entered the funnel)	(The name of the Epic Owner)

Epic Description:

(Consider using the Epic Hypothesis Statement in the Epic article as a starting point for a description of the epic.)

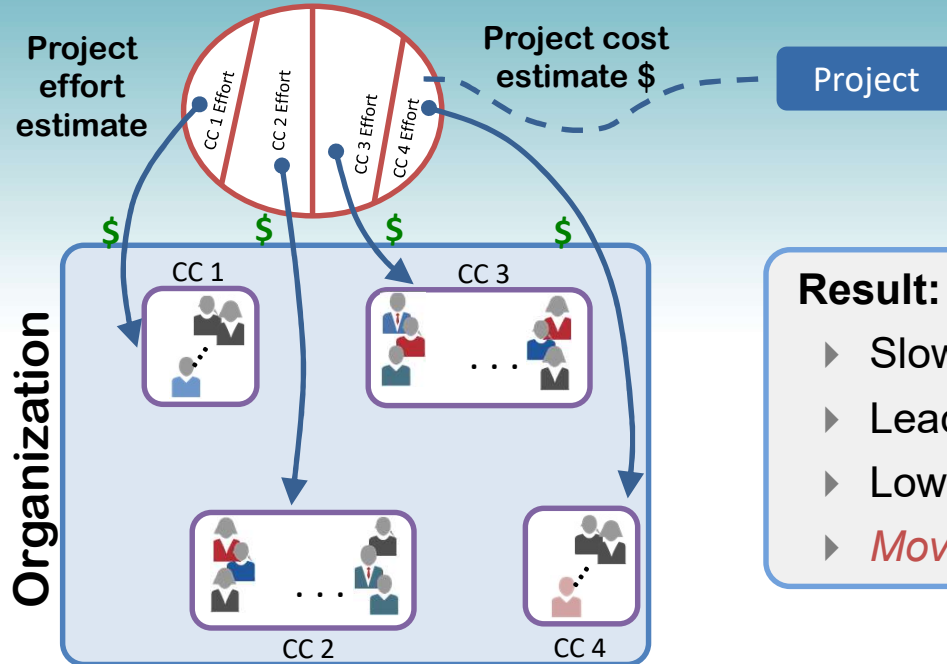| **Outcomes Hypothesis:**	**Leading Indicators**
(Describe how the success of the Epic will be measured: for example, 50% increase in shoppers under 25; Availability increases from 97% to 99.7%, etc.)	(Establish innovation accounting metrics to provide leading indicators of the outcomes hypothesis: for example, a measurable change in purchaser demographics within 30 days of feature release)

In Scope:	**Out of Scope:**	**Nonfunctional Requirements:**
• …	• …	• …
• …	• …	• …
• …	• …	• …

Minimum Viable Product (MVP) Features	**Additional Potential Features**
• (Feature or Capability)	• (Feature or Capability)
• …	• …
• …	• …

Sponsors:

(List key business sponsors who will be supporting the initiative)

Users and Markets Affected:

(Describe the user community and any markets affected)

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Problem: Cost-center budgeting

Project effort estimate

CC 1 Effort CC 2 Effort CC 3 Effort CC 4 Effort

Project cost estimate $

Project

$ $ $ $

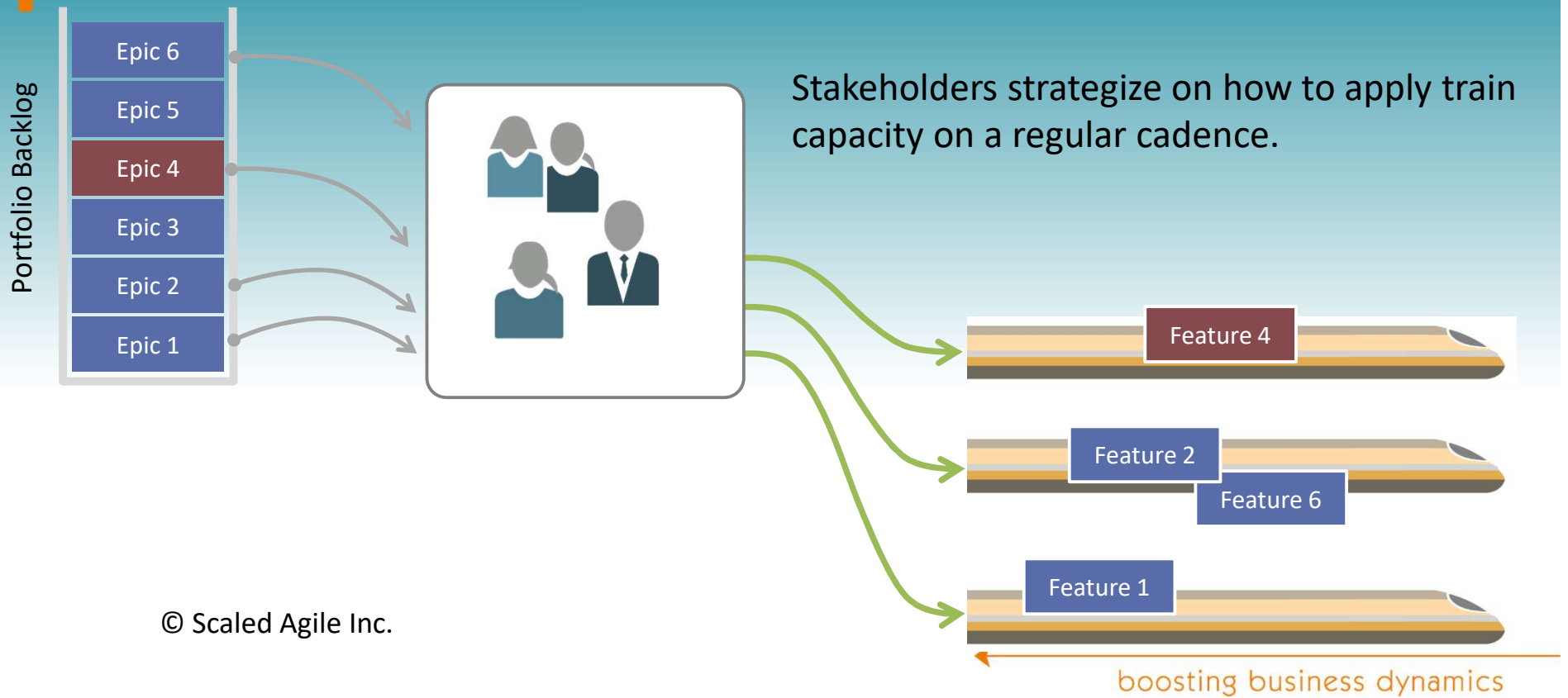**Organization**

CC 1

CC 3 . . .

CC 2 . . .

CC 4

Result:

▸ Slow, complex budgeting process

▸ Leads to utilization-based planning and execution

▸ Low program throughput

▸ *Move the people to the work*

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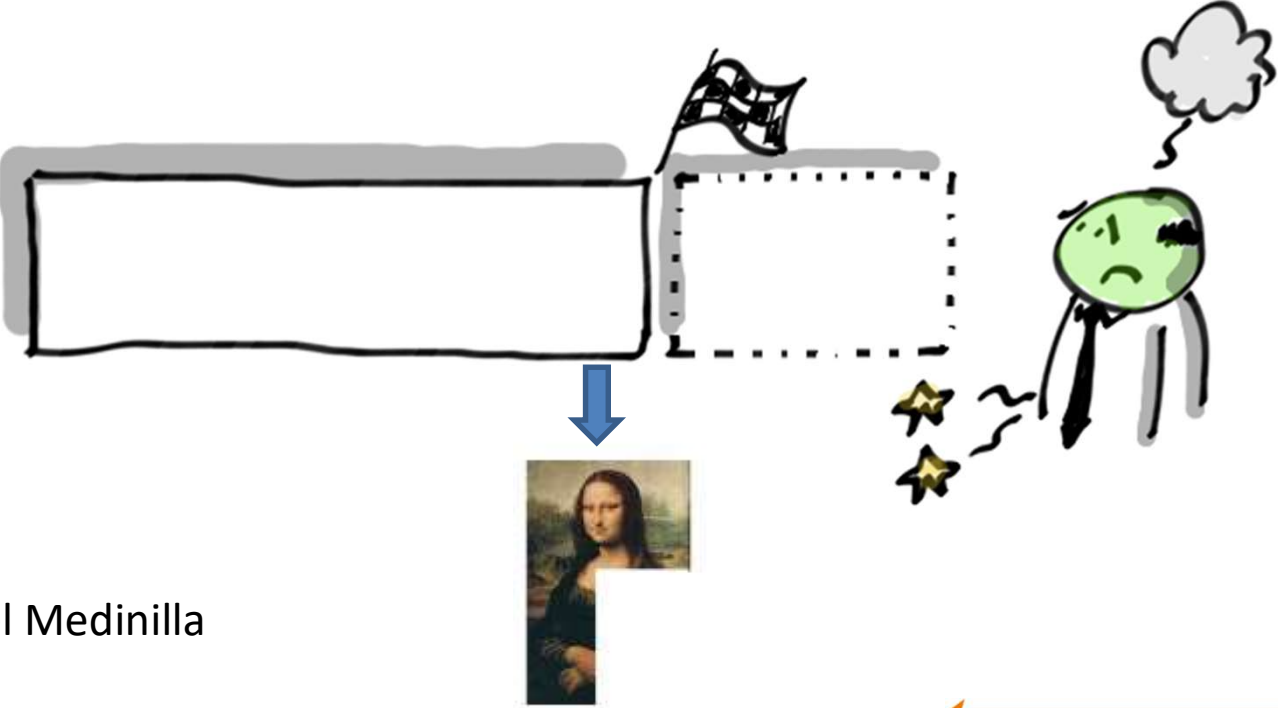
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Transitioning to implementation

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Portfolio Backlog

Epic 6
Epic 5
Epic 4
Epic 3
Epic 2
Epic 1

Stakeholders strategize on how to apply train capacity on a regular cadence.

Feature 4

Feature 2

Feature 6

Feature 1

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Fund Value Streams

Funding Value Streams provides for full control of spend, with:

▸ No costly and delay-inducing project cost variance analyses
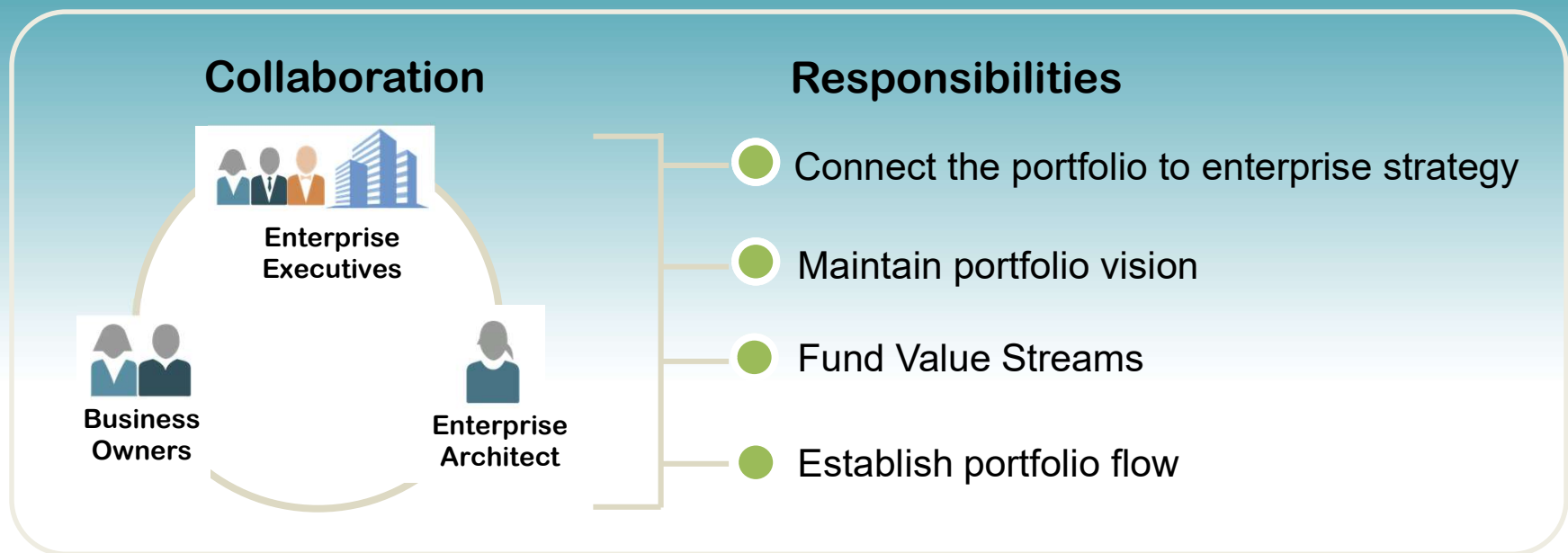
▸ No resource reassignments

▸ No blame game for project overruns

Lean Budgets

Guardrails

Value Streams

AGILE RELEASE TRAIN

AGILE RELEASE TRAIN

AGILE RELEASE TRAIN

Exercise fiscal governance with dynamic budgeting

Financial governance is still in place. Adjust budgets dynamically to meet changing business needs.
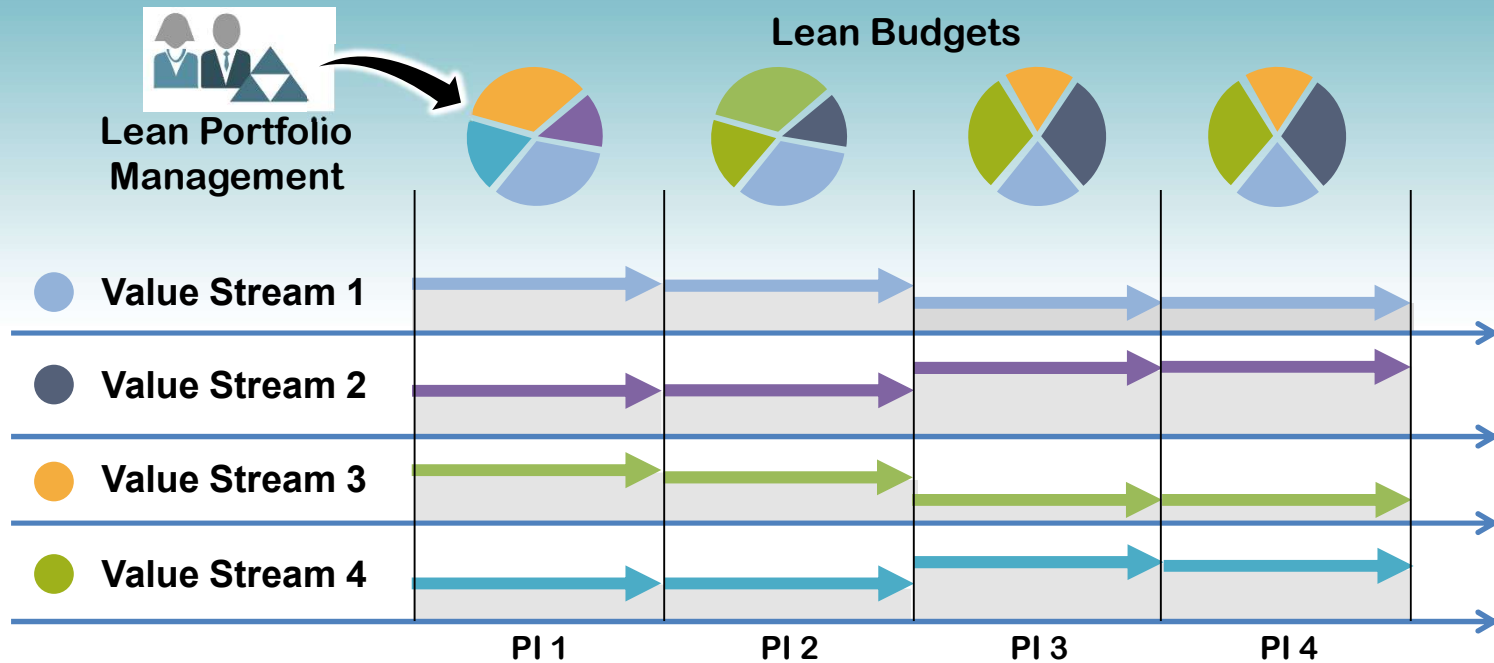
Strategy and Investment Funding: Collaboration and responsibilities

Collaboration

Enterprise
Executives

Business
Owners

Enterprise
Architect

Responsibilities

- Connect the portfolio to enterprise strategy

- Maintain portfolio vision

- Fund Value Streams

- Establish portfolio flow

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Embracing Agility

"*Agile innovation has revolutionized the software industry, [...].*
At this point, the greatest impediment is not the need for better
methodologies, empirical evidence of significant benefits, or proof that
agile can work outside IT. It is the behavior of executives. Those who
learn to lead agile's extension into a broader range of business
activities will accelerate profitable growth."

Harvard Business Review

HBR 2016

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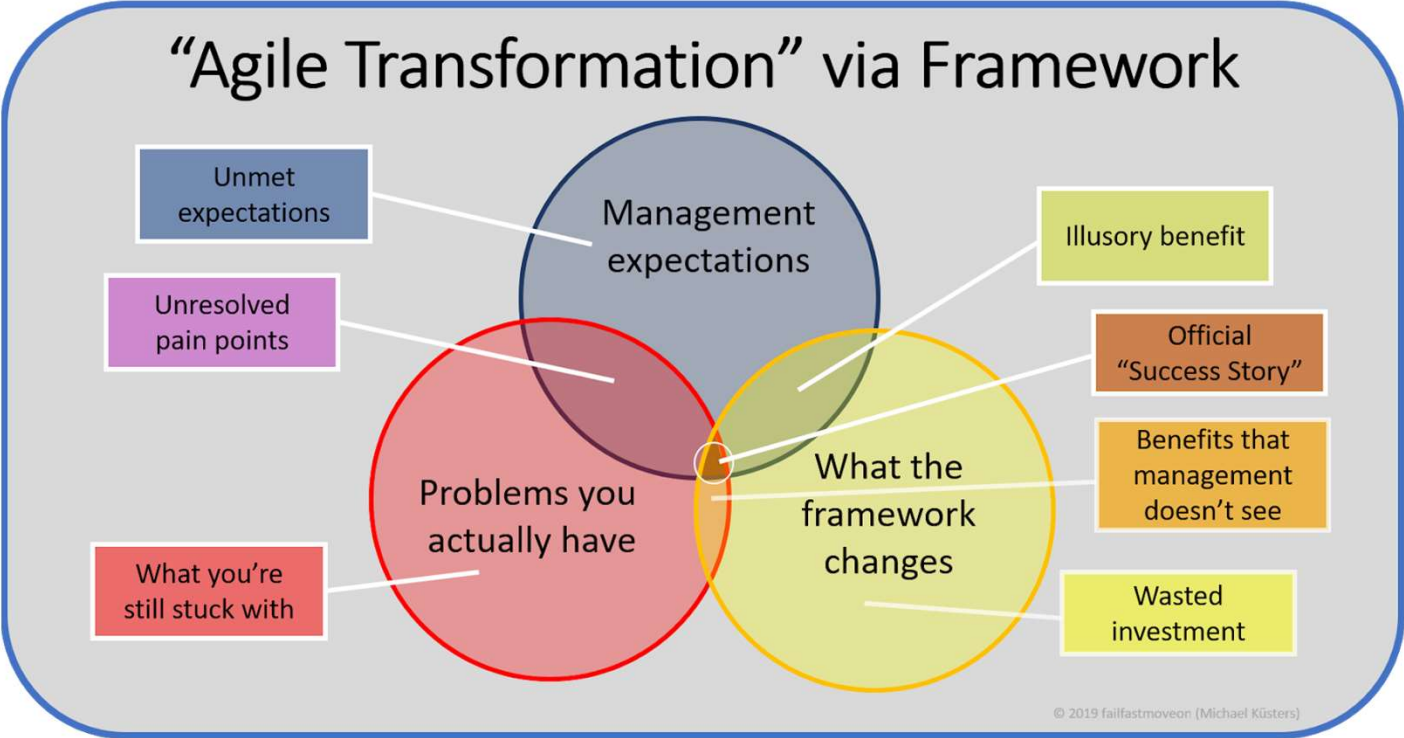
Questions?

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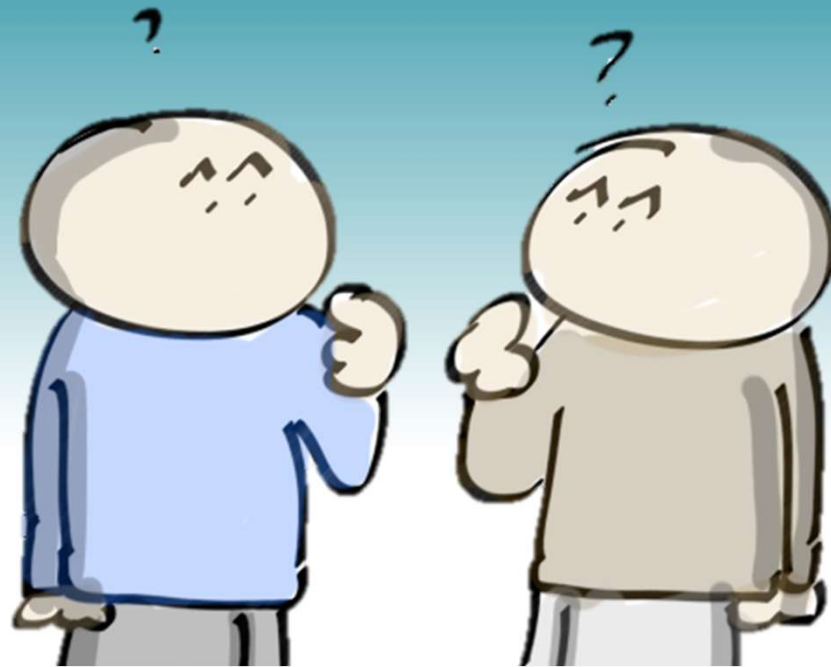
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