

# The Synergistic Nature of PI Objectives

Connecting the Dots Between Goals and Outcomes



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# Session Objectives

- How PI Objectives foster consistent, ongoing alignment between Business and IT
- How PI Objectives connect the dots between effective PI Planning preparation, the PI Event, and PI Execution
- How PI Objectives shift focus from output (Feature/Story completion) to outcomes (Value delivery)

# Synergy

## Origin:

Mid 19th century: from Greek sunergos 'working together', from sun - 'together' + ergon 'work'.

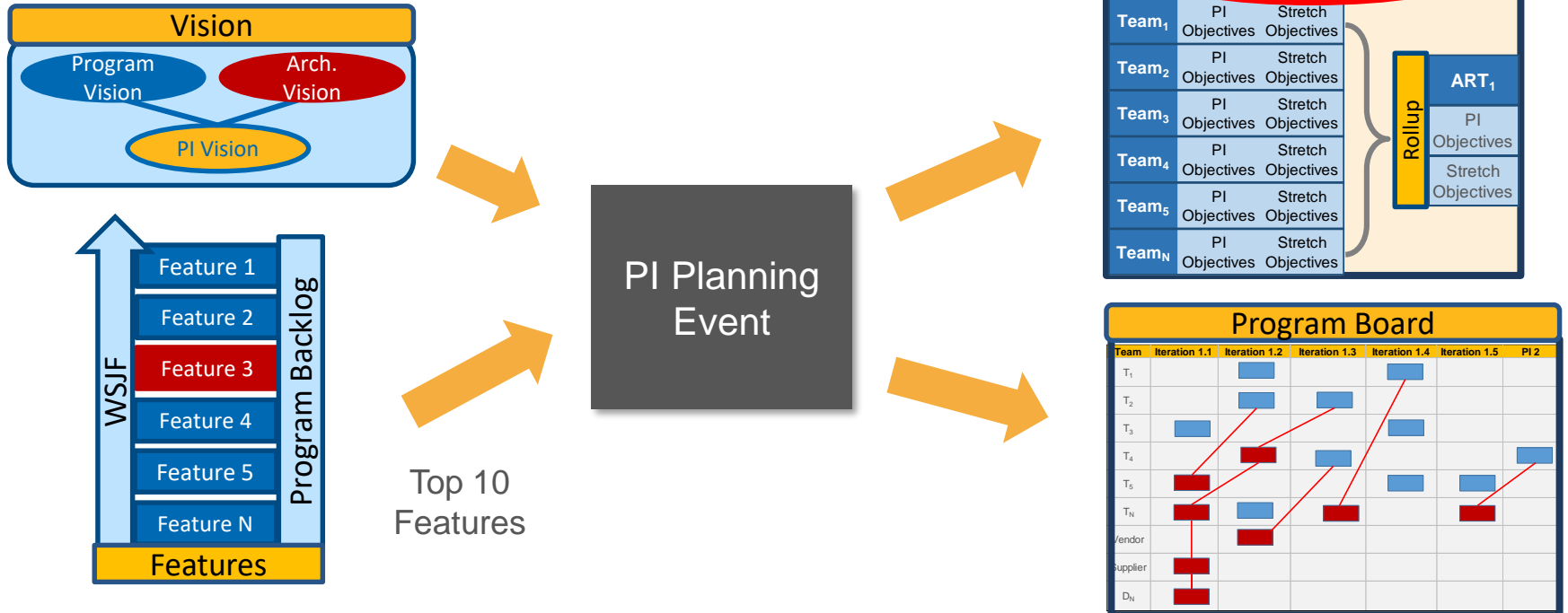
## Defined:

The interaction or cooperation of two or more organizations, substances, or other agents to produce a combined effect greater than the sum of their separate effects.

# The PI Planning Event is the glue!

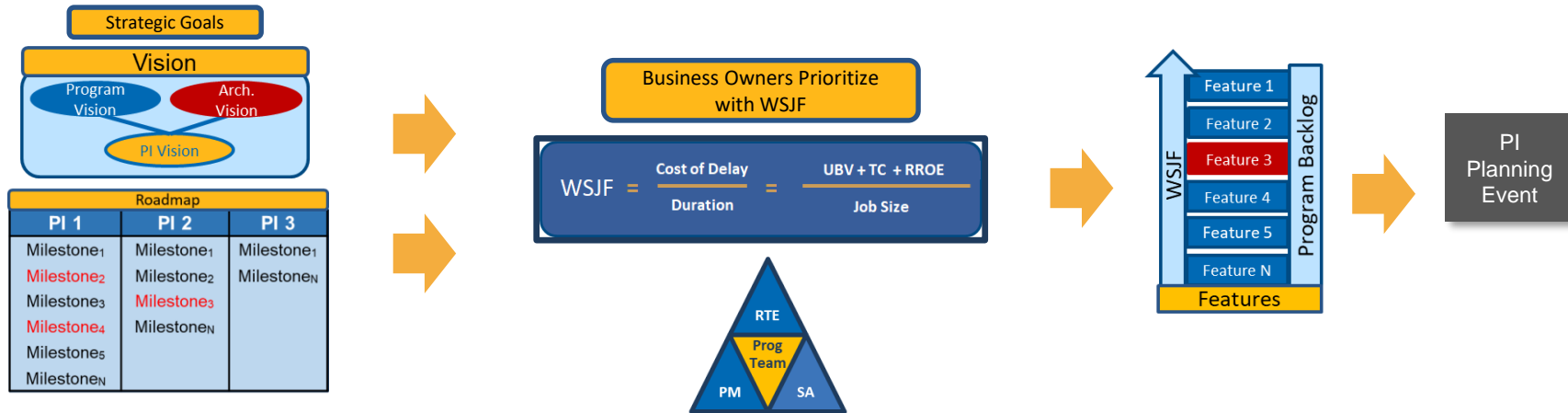
2 Inputs: Vision and top 10 Features

2 Outputs: Team and Program PI Objectives and Program Board



# PI Preparation

- ▶ Vision and Roadmap will help shape Business strategic goals
- ▶ Top Features are prioritized ahead of the PI by using WSJF
  - Feature WSJF sessions foster alignment between IT and Business stakeholders that is maintained throughout planning and execution



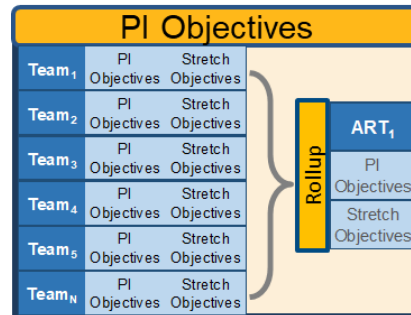
# PI Planning Event



## ▶ Alignment to a common mission!

We are here to gain alignment between business owners and ART teams on a common, committed set of:

- ▶ Program PI Objectives
- ▶ Team PI Objectives



# The PI Planning Event centers around PI Objectives!

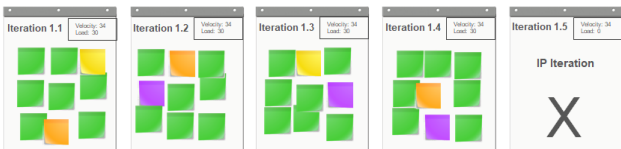
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- ### SAFe® Core Values
1. Code Quality
  2. Program Execution
  3. Alignment
  4. Transparency

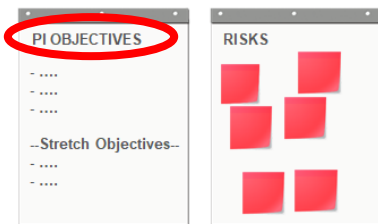
# The PI Planning Event centers around PI Objectives!

## Team Breakout #1

- ART Teams work within and between one another to break Features down into Stories



- These Stories are summarized into draft PI Objectives in the language of the business



- Collectively the team **PI Objectives** form a plan informing the rest of the ART

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# Let's Review PI Objectives

- ▶ **Objectives** are business summaries of what each team intends to deliver in the upcoming PI.

They often map directly to the Features in the backlog, but not always. For example:

- ▶ Aggregation of a set of Features, stated in more concise terms
- ▶ A Milestone, such as a trade show
- ▶ An Enabler Feature needed to support the implementation
- ▶ A major refactoring

## Objectives for PI 1

## Business Value

- › Structured location and validation of locations
- › Build and demonstrate a proof of concept for context images
- › Implement negative triangulation by tags, companies, and people
- › Speed up indexing by 50%
- › Index 1.2 B more web pages
- › Extract and build URL abstracts

## Stretch Objectives for PI 1

- › Fuzzy search by full name
- › Improve tag quality to 80% relevance

# Let's Review PI Objectives

## ▶ Teams should write their **PI Objectives** in '**SMART**' format.

- ▶ **Specific** State the intended outcome as simply, concisely, and explicitly as possible. (Hint: Try starting with an action verb.)
  - ▶ **Measurable** It should be clear what a team needs to do to achieve the objective. The measures may be descriptive, yes/no, quantitative, or provide a range.
  - ▶ **Achievable** Achieving the objective should be within the team's control and influence
  - ▶ **Realistic** Recognize factors that cannot be controlled. (Hint: Avoid making "happy path" assumptions.)
  - ▶ **Time-bound** The time period for achievement must be within the PI, and therefore all objectives must be scoped appropriately
- ▶ Stretch objectives **do** count in velocity/capacity.
  - ▶ They are planned, and aren't extra things teams do 'just in case you have time'
  - ▶ However, they are not included in the commitment, thereby making the commitment more reliable
  - ▶ If a team has low confidence in meeting a PI Objective, encourage them to move it to stretch
  - ▶ If an item has many unknowns, consider moving it to stretch, and put in early spikes

# The PI Planning Event centers around PI Objectives!

**Draft plan review agenda:**

1. Velocity (capacity) and load
2. **Draft PI Objectives**
3. Program risks and impediments
4. Q&A

**PI OBJECTIVES**

- ....
- ....
- ....
- Stretch Objectives--
- ....
- ....

**RISKS**

Velocity (Capacity): \_\_\_\_\_

Load: \_\_\_\_\_

**Impediments**

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# The PI Planning Event centers around PI Objectives!

## Management Review

- Based on the constraints from the Draft Plan Review, Leadership, Product Management, Business Owners, and others stay behind to problem solve ART constraints and issues, including de-scoping features that accomplish **PI Objectives**

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# The PI Planning Event centers around PI Objectives!

## Team Breakout #2

- ▶ In the second team breakout, Business Owners circulate and assign business value to **PI Objectives** from low (1) to high (10)
- ▶ Teams finalize the Program Increment plan
- ▶ Teams also consolidate program risks, impediments, and dependencies
- ▶ Stretch **objectives** provide the capacity and guard band needed to increase cadence-based delivery reliability

Objectives For PI 1	Bus. Value
- Structured locations and validation of locations	7
- Build and demonstrate a proof of concept for context images	8
- Implement negative triangulation by: tags, companies and people	8
- Speed up indexing by 50%	10
- Index 1.2 billion more web pages	10
- Extract and build URL abstracts	7
==== <b>Stretch Objectives</b> ====	====
- Fuzzy search by full name	7
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# The PI Planning Event centers around PI Objectives!

- Teams and Business Owners review all final plans



## Final plan review agenda:

- Changes to velocity (capacity) and load
- Final **PI Objectives** with business value
- Program risks and impediments
- Q&A

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# The PI Planning Event centers around PI Objectives!

## ► Confidence Vote: Team and Program Levels

“Fist of five” confidence vote

- Range of 1-5
- 1 = No confidence
- 5 = Very high confidence

A commitment with two parts:

1. Teams agree to do everything in their power to meet the agreed-to **objectives**
2. In the event that fact patterns dictate that it is simply not achievable, teams agree to escalate **immediately** so that corrective action can be taken

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# The PI Planning Event centers around PI Objectives!

## ▶ Moving Forward: What happens after PI Planning?

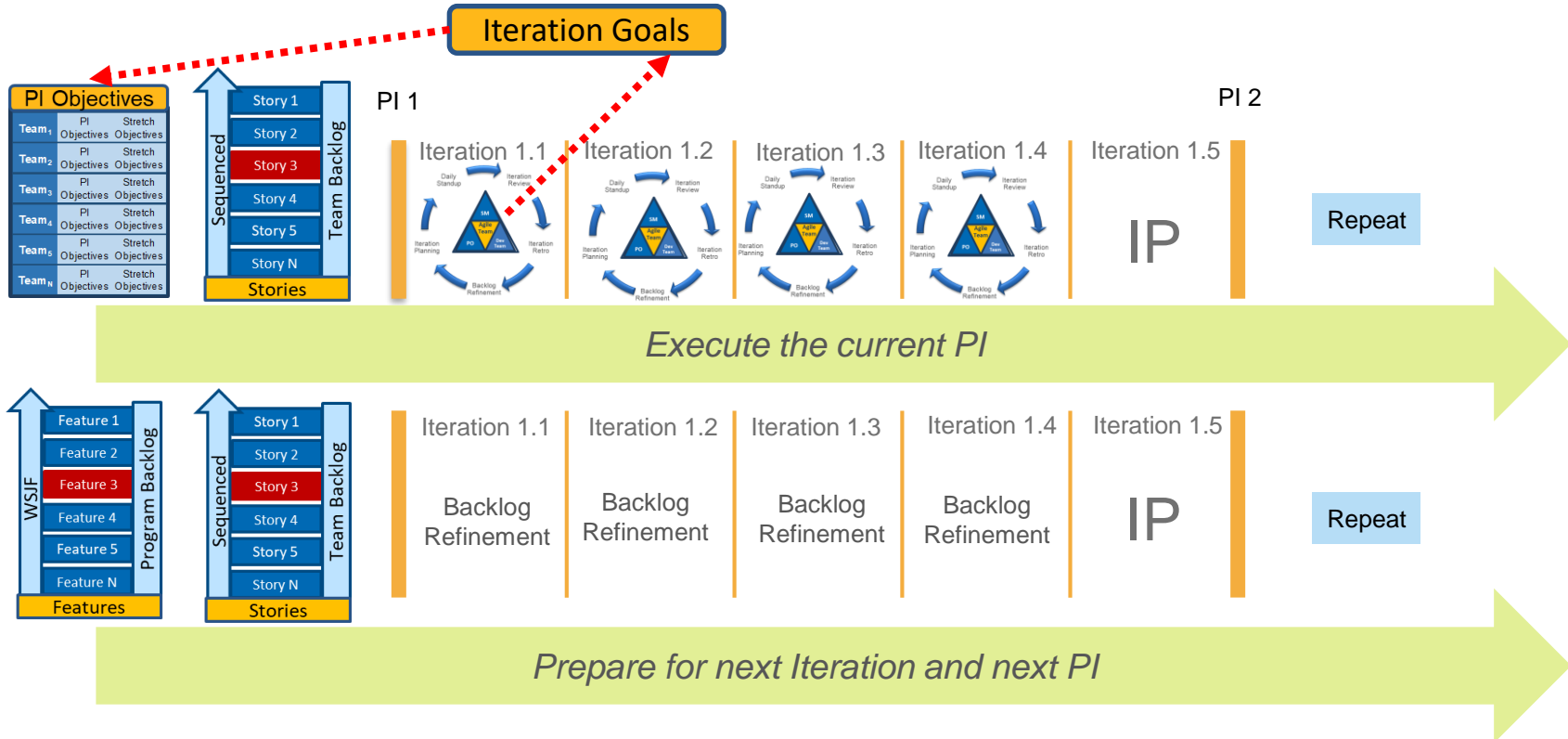
- ▶ Capture **objectives** and Stories in Agile project management tooling
- ▶ Aggregate Team **PI Objectives** to Program PI Objectives
- ▶ Scrum of Scrum, PO Sync, and Iteration Review and System Demo cadences
- ▶ Program Backlog refinement and next PI Planning preparation
- ▶ Summarizing PI Planning retrospective results
- ▶ Cleaning up the room!

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# PI Execution

# Team Level – Parallel Activities

Team ceremonies connect Iteration Goals to achieving **PI Objectives**



# Iteration Planning – Committing to Iteration Goals

## Iteration Daily Stand-up (DSU):

- ▶ What did I do yesterday to advance the **Iteration Goals**
- ▶ What will I do today to advance the **iteration goals**
- ▶ Are there any impediments that will prevent the team from meeting the **Iteration Goals**

## Iteration Plan:

- ▶ Define and commit to what will be build in iteration
- ▶ Result in **Iteration Goals** and backlog of the team's commitment
- ▶ Reciprocal commitment between team and business

## Iteration Goals

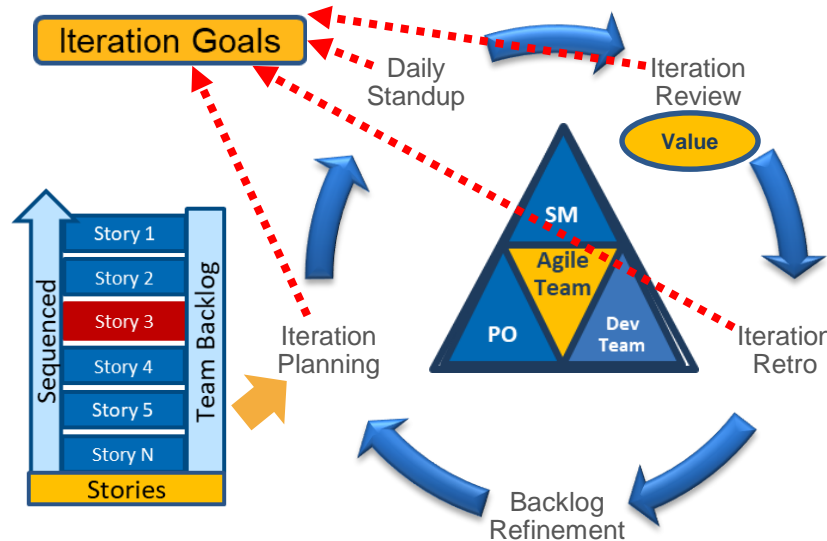
- ▶ Align team members to a common purpose
- ▶ Align Program Teams to common **PI Objectives** and manage dependencies
- ▶ Provide continuous management information

## Iteration Review:

- ▶ How we did on the Iteration
  - Did we meet **goals**
  - Story by Story review
- ▶ How we are doing on the PI
  - Review of **PI Objectives**
  - Review remaining scope and reprioritize as needed

## Iteration Retrospective:

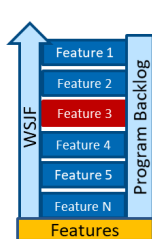
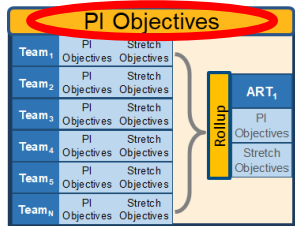
- ▶ Quantitative
  - Improvement items complete this iteration
  - Did the team meet the **Iteration Goals**
  - Review iteration metrics
- ▶ Qualitative
  - 3 questions (went well, not so well, do better next time)



# Program Execution

# Program Level – Parallel Activities

## ART ceremonies connect PI Execution to achieving **PI Objectives**



PI 1

Iteration 1.1

- Scrum of Scrums
- PO Sync
- System Demo

Iteration 1.2

- Scrum of Scrums
- PO Sync
- System Demo

Iteration 1.3

- Scrum of Scrums
- PO Sync
- System Demo

Iteration 1.4

- Scrum of Scrums
- PO Sync
- System Demo

Iteration 1.5

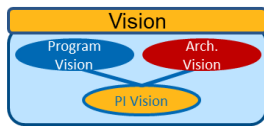
- Innovation
- I&A Workshop
- PI Planning

PI 2

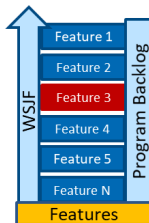
IP

Repeat

*Execute the current PI*



Roadmap		
PI 1	PI 2	PI 3
Milestone <sub>1</sub>	Milestone <sub>1</sub>	Milestone <sub>1</sub>
Milestone <sub>2</sub>	Milestone <sub>2</sub>	Milestone <sub>N</sub>
Milestone <sub>3</sub>	Milestone <sub>3</sub>	
Milestone <sub>4</sub>	Milestone <sub>N</sub>	
Milestone <sub>5</sub>		
Milestone <sub>N</sub>		



Iteration 1.1

- Update product roadmap and vision based on PI outcomes
- Define and estimate new Epics
- Refine Epics impacting next PI
- Create/refine EA Vision
- Create Enabler Epics

Iteration 1.2

- Roadmap Epics into Features
- Identify Enablers

Iteration 1.3

- Feature refinement
- Enablers refined

Iteration 1.4

- Top n Features vetted with LOBs
- Prepare Executive Brief
- Feature refinement
- Top n Features discussed with SAs
- Enabler Capacity Allocation agreed
- Prepare Product Vision/Roadmap
- Prepare Arch Vision

Iteration 1.5

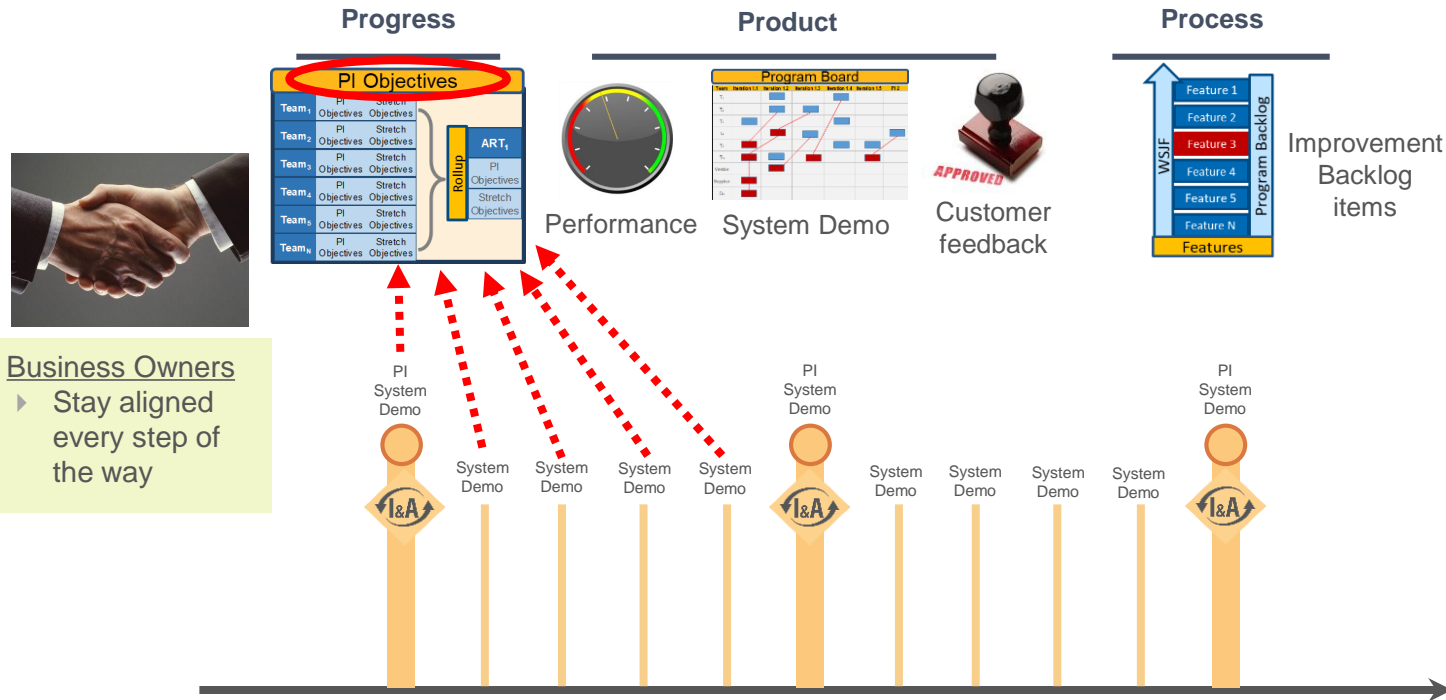
- Top n Features socialized with teams
- High level starter stories created
- Finalize presentations
- Train/Prep new ART leaders, BOs, Lean-Agile Leadership

Repeat

*Just-In-Time refinement and preparation for next PI*



Demos are orchestrated to deliver objective progress, product, and process metrics.



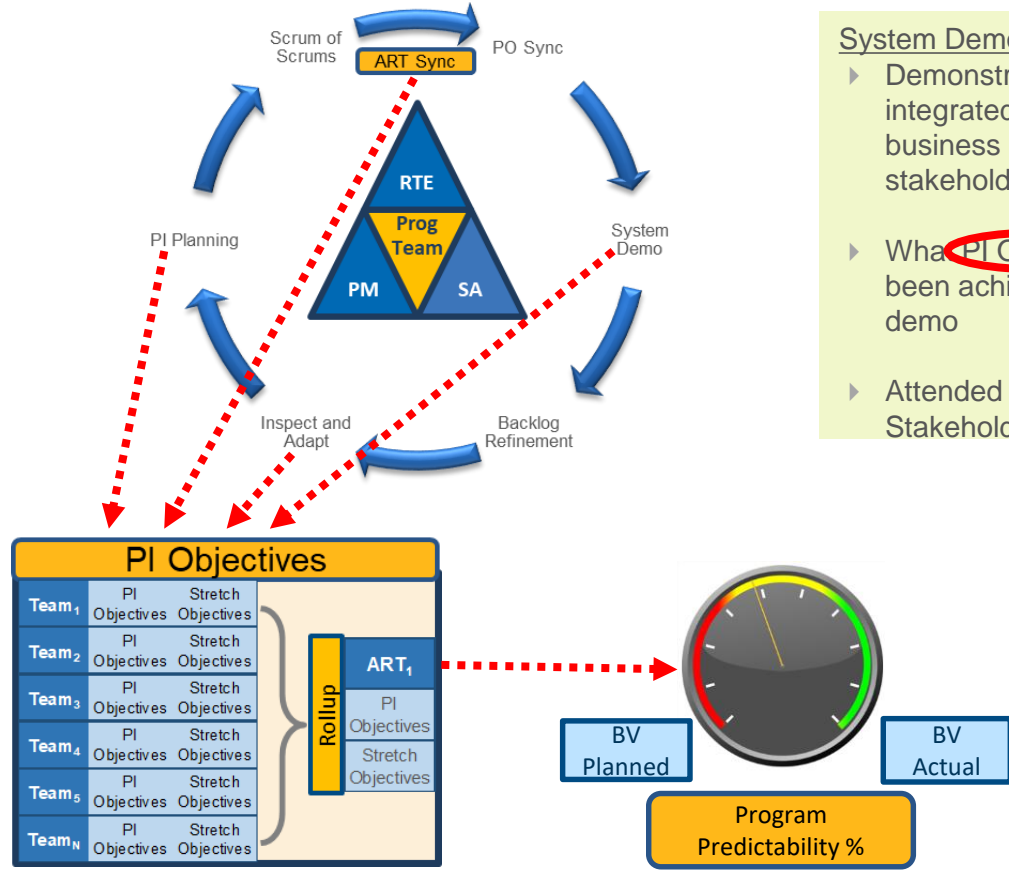
- ▶ System Demos provide incremental progress of **PI Objectives** to the Business
- ▶ As part of I & A, the PI System Demo highlights the completed **PI Objectives**
- ▶ Also as part of I & A, the Business assigns Actual BV scores and the **PI Objective** results are reviewed
- ▶ Results in the range of 80-100% show high value

*SAFe principle #5 – base decisions on objective milestones*

# Program execution focuses on delivering PI Objectives

## Inspect and Adapt

- ▶ PI System Demo
  - At the end of the PI, teams demonstrate the current state of the Solution to the appropriate stakeholders
  
- ▶ Quantitative Measurement
  - Teams meet with Business Owners to self-assess the business value they achieved for each **PI Objective**
  - Program Predictability Measure show each team's planned vs actual business value
  
- ▶ Problem Solving Workshop
  - ART Teams address the larger impediments that are limiting velocity

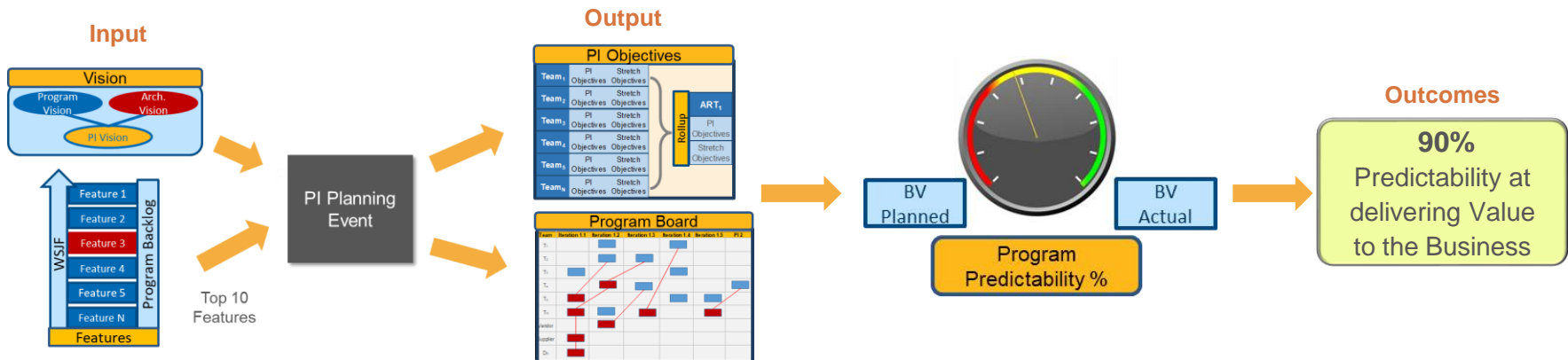


## System Demo:

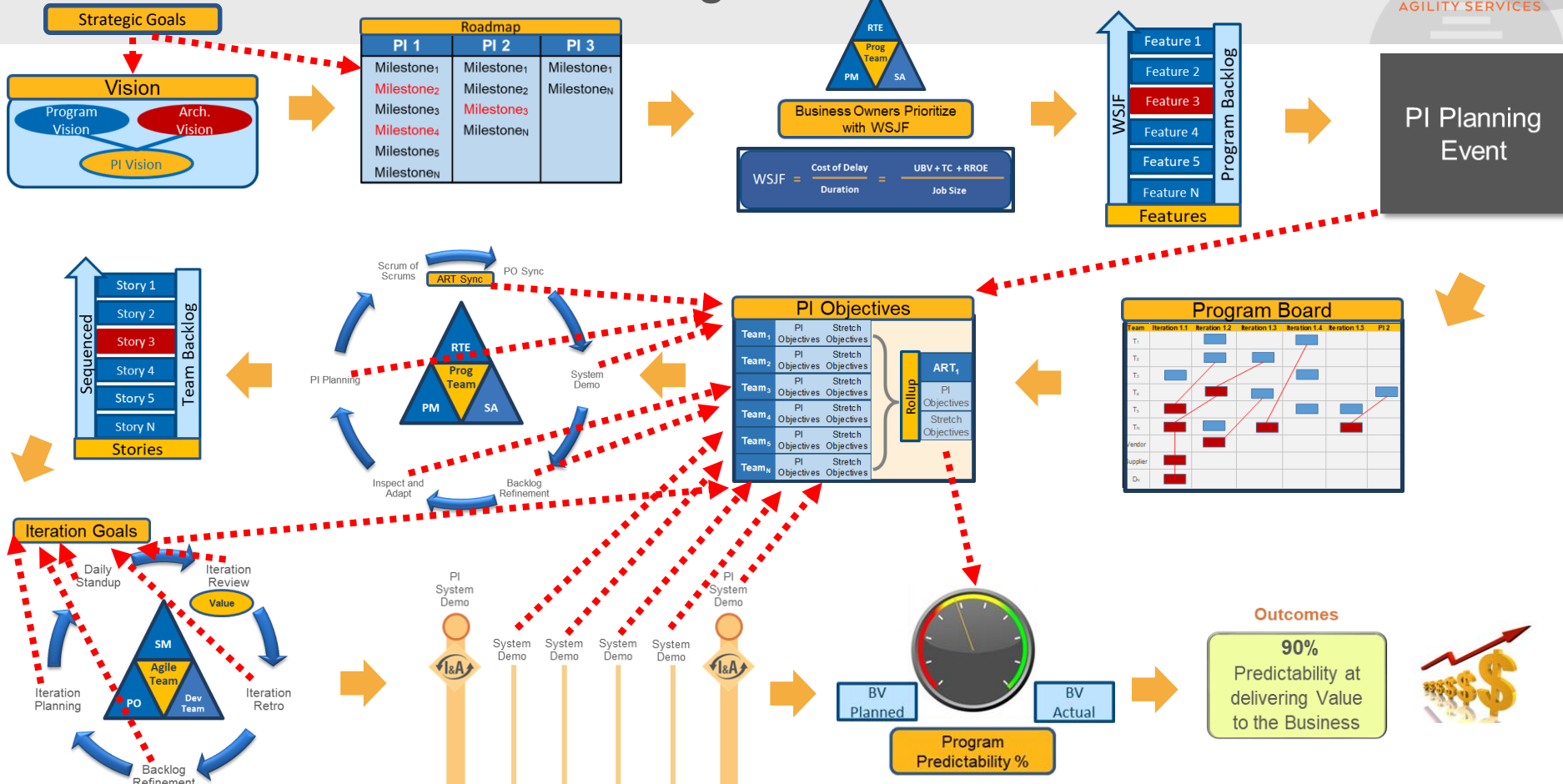
- ▶ Demonstration of the integrated working system to business owners and stakeholders
  
- ▶ What **PI Objectives** have been achieved since the last demo
  
- ▶ Attended by Program Stakeholders

# PI Objectives shift focus from output to outcomes!

- ▶ Features are not the end goal but merely a means to an end
- ▶ The goal is not to simply complete Features and Stories for the sake of completing them but to understand what value is being delivered by those vehicles
- ▶ By continuing to make the conversation about what the objectives are trying to achieve rather than the features we are trying to complete, we focus the attention on the outcomes rather than simply output



# Connect the Dots in One Page!



# Summary

- **PI Objectives** provide synergy throughout the PI between Business and IT
- **PI Preparation** focuses attention on understanding the Benefits to be delivered by a Feature
- **PI Planning** focuses conversation around the PI Objectives to be achieved by Team plans (Iteration Goals)
- **PI Execution** focuses on achieving the PI Objectives, increasing the PI Outcomes and alignment to the Business

# Questions

