The Synergistic Nature of PI Objectives

Connecting the Dots Between Goals and Outcomes
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ICON Agility Services
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 Planning Event

Top 10 Features

Program Board

PI Objectives
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!

Day 1

8:00-9:00 Business context
State of the business and upcoming objectives

9:00-10:30 Product/Solution Vision
Vision and prioritized features

10:30-11:30 Architecture Vision & development practices
Architecture, common frameworks, etc.
Agile tooling, engineering practices, etc.

11:30-1:00 Planning context and lunch
Facilitator explains planning process

1:00-4:00 Team breakouts
1 2 3 4
Teams develop draft plans and identify risks and impediments
Architects and Product Managers circulate

4:00-5:00 Draft plan review
Teams present draft plans, risks, and impediments

5:00-6:00 Management review & problem solving
Adjustments made based on challenges, risks, and impediments
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8:00-9:00 Planning adjustments

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Teams develop final plans and refine risks and impediments
Business Owners circulate and assign business value to team objectives

Day 2

11:00-1:00 Final plan review & lunch
Teams present final plans, risks, and impediments

1:00-2:00 Program risks
Remaining program-level risks are discussed and ROAMed

2:00-2:15 PI confidence vote
Team and program confidence vote

2:15-?? Plan rework if necessary
If necessary, planning continues until commitment is achieved

Planning retrospective & moving forward
Retrospective
Moving Forward
Final Instructions

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
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

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<tr>
<th>Business Value</th>
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| › 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

### Day 1

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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.
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

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- After commitment Planning retrospective & moving forward: If necessary, planning continues until commitment is achieved

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- Scaled Agile, Inc.®
Final plan review agenda:

1. Changes to velocity (capacity) and load
2. Final PI Objectives with business value
3. Program risks and impediments
4. Q&A

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Teams and Business Owners review all final plans.
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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- **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 Scrums, 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.

Execute the current PI

Prepare for next Iteration and next PI
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 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
- 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**

**Execute the current PI**

**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
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

90% Predictability at delivering Value to the Business

- Input
  - Vision
  - Program Vision
  - Program Backlog
  - Top 10 Features

- Output
  - PI Planning Event
  - Program Board
  - PI Objectives
  - 8V Planned
  - 8V Actual
  - Program Predictability %

- Outcomes
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.