White Paper: Implementing SAFe® with BigPicture

SAFe® PI Planning with BigPicture

Software Plant
ABOUT PI PLANNING

“There’s no magic in SAFe... except maybe for PI Planning.” © Scaled Agile, Inc.

While, apparently, it’s not rocket science to plan a sprint for a single team, planning the scope of work that serves the purpose of meeting specifically defined business objectives, for longer periods spanning several weeks, for a number of related teams, comes pretty close.

Program Increment Planning, or PI Planning for short, while a complex and challenging task, lies at the heart of the SAFe® methodology and serves to ensure that everyone on board works towards a shared vision and mission.

To cut a (literary) long story short, PI Planning is a two-day event that takes the form of a large meeting that follows a set agenda (including the presentation of business context and company vision) and is attended by the members of all teams — in line with the Agile Manifesto’s popular dictum that face-to-face conversation is “the most efficient and effective method of conveying information”. During team breakout sessions, specific teams design their iteration plans and PI objectives for the upcoming PI (usually spanning 8 to 12 weeks).

A successful PI Planning event should produce team-committed PI objectives and a Program Board, which will remain visible and fully accessible to all, as well as open for updates and alterations that may prove required in the course of your entire PI.

PI PLANNING BENEFITS:

- Coordinating business goals with business context, vision, and company objectives.
- Coordinating demand with capacity; safeguarding against excess Work in Progress.
- Creating a social network; fostering the building of cross-team relations; raising team spirit, and enabling cooperation.
- Identifying cross-team and cross-ART dependencies.
‘TOOLS OR NO TOOLS;’ THAT IS THE QUESTION

There is a SAFe® recommendation — a rather controversial and disputed one — that says PI Planning should be conducted without the facilitation of any software. The traditional sticky note and a pen are your permitted instrumentarium.

Once you have found an app that helps attain exactly these aims, a case can easily be made for, after all, introducing work-facilitating software into the SAFe® PI Planning ritual.

BigPicture is a SAFe®-compliant product management app, which offers a collection of features for cross-team planning, dependency mapping, and risk management.

The present white paper aims at showcasing how this powerful app can aid Program Increment Planning, and move on to serve as a useful product management tool when program proceeds to execute the PI.

The advantages of avoiding software are, among others, encouraging team spirit, stimulating commitment, or the presumed ‘easiness of using a red marker.’

Yet, all the information jotted down on sticky notes will eventually have to be entered into your teams’ regular work area, be it Jira, Trello or other. Costly and time-consuming as the event is, especially for geographically distributed teams, PI Planning should always be performed to allow maximum efficiency, time-effectiveness, and productivity.

USEFUL FEATURES TO FACILITATE YOUR PI PLANNING:

- Roadmap, for aligning everyone to the company mission, vision, and objectives.
- Board, for planning multiple iterations and presenting cross-team dependencies.
- Scope, for managing Program Backlog with multi-level structure.
- Risks Matrix, for active and effective risk identification and management.
PRESENT YOUR BUSINESS CONTEXT & PRODUCT VISION

One of the main aims of PI Planning is to make all of your teams familiar with your current business context, present all attendees with company objectives, and align everybody to the product mission and vision.

First, during the PI Planning kick-off, a senior executive outlines the present state of the business and gives a perspective on how well Customer needs are being met by the existing solution. This is precisely where BigPicture SAFe®-compliant Roadmap module comes in handy.

This tool is best used to define and present product roadmap for the upcoming Program Increment and thus set clear targets for your ART. These are going to serve as your teams’ guideposts, setting the desired course for the entire ART to follow in the coming weeks.

After the business context has been laid out, Product Management demonstrates the product vision, typically by presenting the list of top 10 features of program backlog.

With BigPicture Scope module, not only can they be visualized but they can also be ordered according to the WSJF (Weighted Shortest Job First) prioritization model designed to help set the to-be-performed jobs in an order that ensures maximum business benefits.
FACILITATE TEAM BREAKOUT SESSIONS

Once the general context is explained and top features presented, there follows a team breakout session, when teams calculate their capacity for each iteration, decompose the features into manageable stories, and determine the backlog items to do. Consequently, iteration plans are drafted, dependencies recognized, risks identified, and each team enters specific features onto the Program Board.

This vital stage in the PI Planning procedure can also be hugely facilitated by a BigPicture’s tool — namely the Board module. This component is versatile enough to allow for determining backlog items at the Program Increment level, as well as zooming in to the iteration level, where more granular planning is performed.

To cut a long story short — Board lets you plan with multiple teams and on multiple levels (PIs or Iterations) at once. The effort being undertaken in the form of the planned scope of work may then be compared to the team’s capacities as defined in BigPicture Resources module.

UP YOUR SAFE® PI PLANNING GAME

- Break from ‘one team/one board’ Jira constraint.
- Analyze and plan the scope of work for multiple people at once.
- Identify and establish cross-team dependencies.
- Plan Epics, Features, and Stories at different levels.
- Never lose sight of who’s doing what, and when.
- Effortlessly plan and decompose scope of work with backlog feature.
PRESENT COMMITTED PI OBJECTIVES

When teams have decomposed features into stories, assigned them among themselves, identified dependencies, and planned their Iterations for the upcoming Program Increment, they come back with one of the two primary outputs — a set of Committed PI Objectives.

This set of SMART (Specific, Measurable, Achievable, Relevant, Time-bound) objectives, which have been set during team breakout sessions — each with the business value assigned by the Business Owner — can then be entered into BigPicture Roadmap, and kept there for all to see and refer to.

The Management will have immediate access to them and will be able to instantly check how teams are performing against their objectives, period by period, for the course of the ongoing PI.

WITH BIGPICTURE ROADMAP YOU CAN:

- Define Planned Business Value of your Objectives and select the ones that bring maximum benefit.
- Specify the objectives for your teams at various levels: PIs and iterations.
- Measure how your iterations, PIs, and projects are progressing with Reports.
- Determine Actual Business Value, and monitor how your objectives are attained.
- Instantly check how your teams are performing against their objectives.
- See your entire ART performance or zoom in for details of your choice with a single click.
During their planning sessions, teams have determined potential program-level obstacles or impediments that could affect their ability to attain the committed objectives. The PI Planning schedule includes a session that aims at addressing these risks, one by one, and categorizing them as Resolved, Owned, Accepted or Mitigated.

This way, when a project is fully scheduled and underway, the organization is well prepared to constructively face any of the foreseen problems, effectively manage them, and ensure that the project proceeds as smoothly as possible.

Risk identification and categorization can be kept tidy and useable with BigPicture Risk module designed to show a visual representation of sensitive issues. The module offers to display your set of foreseen risks either as a simple register or in the form of a risk matrix with a useful heatmap feature.

The tool helps attach values to identified risks in order to calculate their probability and define potential consequences. It comes equipped with built-in SAFe ‘ROAM model’ for effortless status assignment and tracking.
When program risks have been addressed, teams take a vote of confidence. If they are not convinced that the objectives can be met within the assumed time constraints, plans are reworked. Following a session of planning retrospective, PI Planning draws to a close.

Thanks to BigPicture, the effects of two-day work of many people — work that can be worth as many as 20,000 person-hours, such as: the updated roadmap of PI objectives, teams’ iteration plans, and a register of identified risks, are all stored in one working area, instantly available to all. They can now be easily communicated externally, and progress toward the determined goals can be tracked effortlessly.

Being a significant and weighty event that requires meticulous planning, attentive preparation, and skillful coordination, PI Planning is best aided by modern software compliant with Scaled Agile Framework that offers to speed the process up, increase efficiency and save precious time. These are precisely the core advantages BigPicture can deliver.

When the program proceeds to execute the planned PI, BigPicture will be there to offer even more: track and report progress, respond to change, safeguard deadlines, effectively manage resources, and — in result — improve teams’ productivity and ensure more effective implementations.
SoftwarePlant was founded in 2015. Now, only a few years later, our suite of Product and Project Portfolio Management products have been tried and tested, and found favor with over three million users around the globe.

With close to 17,000 teams, from start-ups to Fortune 500 companies, using our solutions every day, we are convinced that our success has been possible due to an unbeatable combination of four factors: modern thinking, a love for technology, meticulous attention to quality, and a drive for constant improvement.

SAFe® PLATFORM PARTNER
Scaled Agile Framework is one of the most complete and mature PM methodologies inspiring the development of our products.

ATLASSIAN PLATINUM TOP VENDOR
All of our plugins have been through a rigorous review process by Atlassian, who holds vendors to high standards for add-on traction and reliability.

OUTSTANDING SUPPORT
Customers are the focus of our attention, which is why we place great emphasis on competent and timely support.

30-DAY MONEY BACK GUARANTEE
If for some reason our products do not satisfy your needs, let us know and we’ll refund you without any hassle!