Strategy to Execution

Business Owners are the Key

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ICON Agility

Session Objectives

- How Business connects strategy to execution

- Business responsibilities

- The balancing act between Business, Product and Architecture

- Where Business participates in framework flow

- BO participation ahead of PI planning, during PI Event and PI Execution

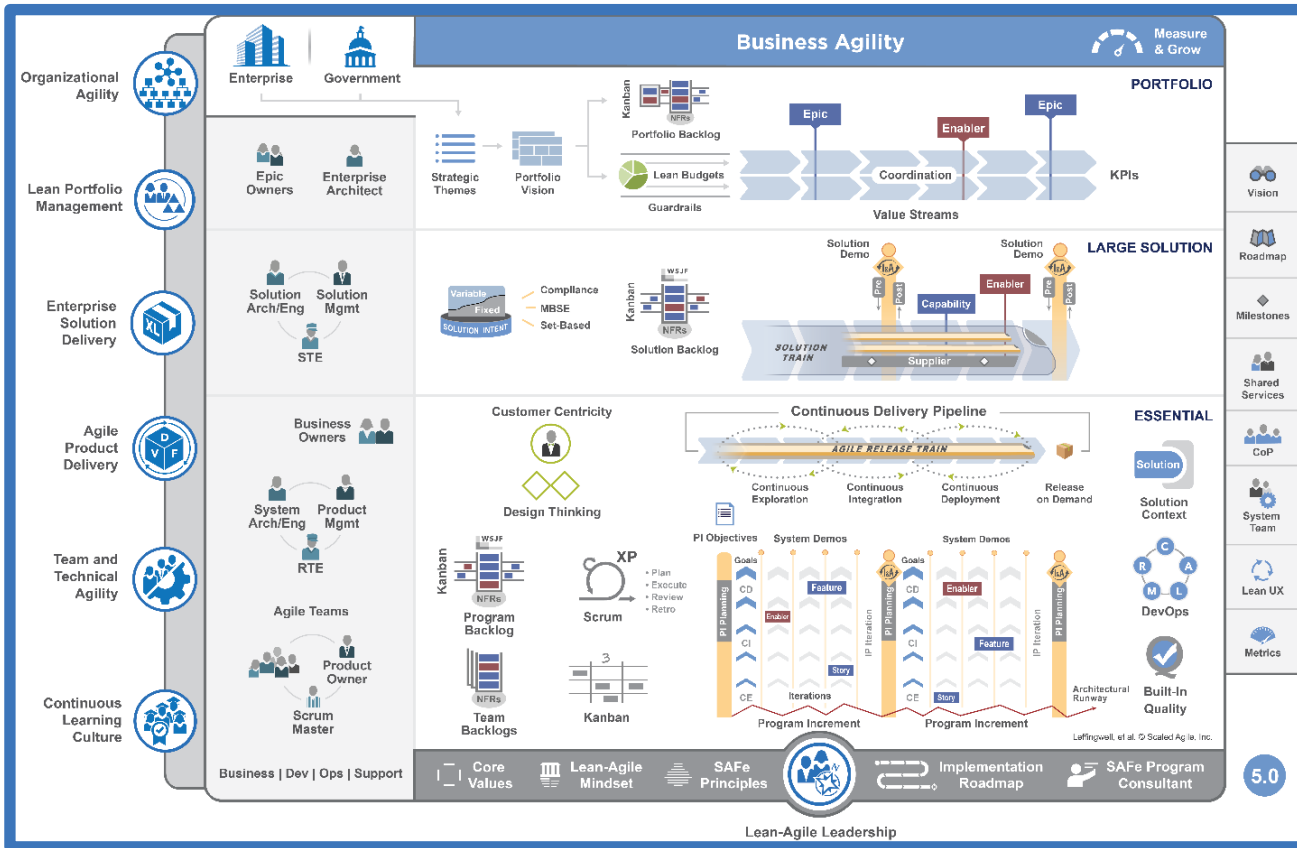# Connecting Strategy and Execution

Business Owners Connect Strategy to Execution
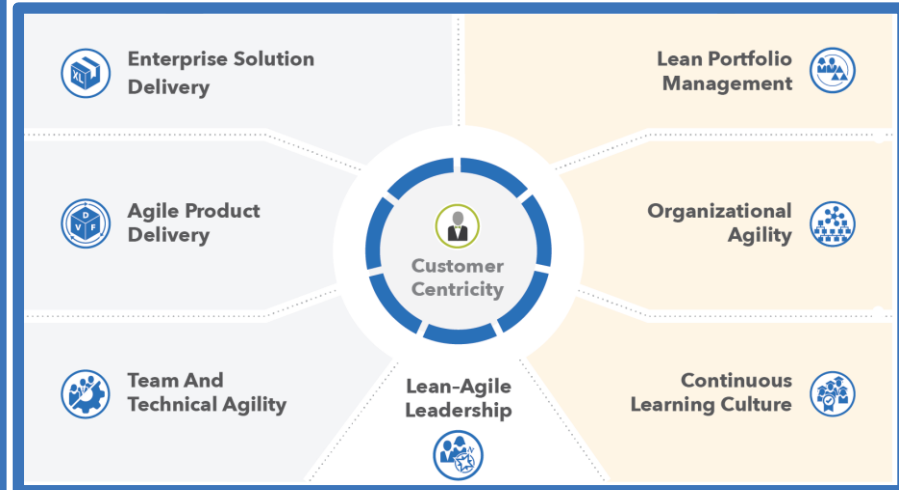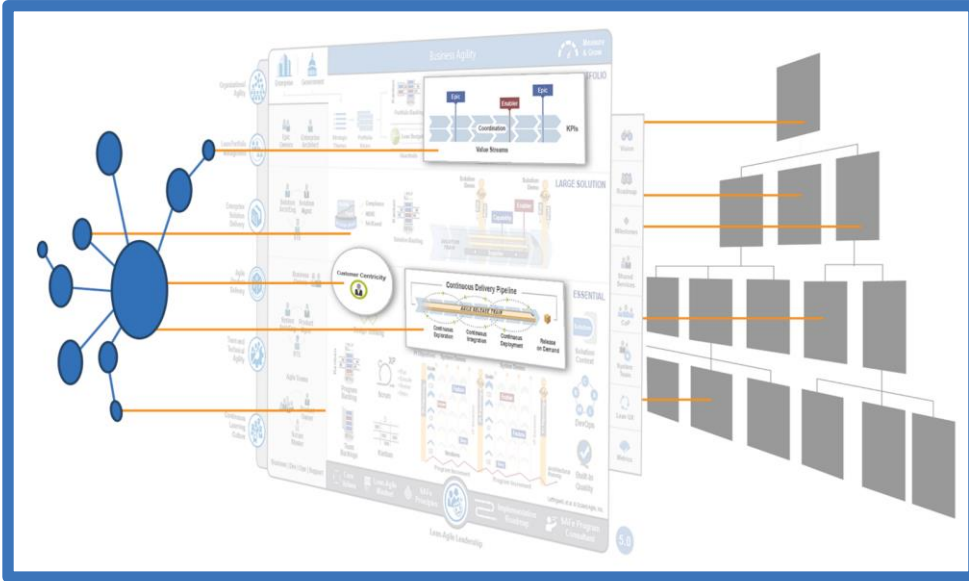
- ▸ The Business is part of the overall Dual-Operating system

- ▸ They play a key roll throughout SAFe

- ▸ The Core Competencies of Business Agility

- ▸ Business is involved in each one

Business Owners Connect Strategy to Execution

## Planning Horizons

- Enterprise (multi-year)
- Portfolio (multi-PI/multi-year)
- ART (PI/multi-PI)
- Team (Iteration)

Key SAFe Principles

- Take an economic view
- Apply systems thinking
- Base milestones on objective evaluation of working systems
- Visualize and limit WIP, reduce batch sizes, and manage queue lengths
- Decentralize decision-making
- Organize around value

Responsibilities

Business Owner Team Example
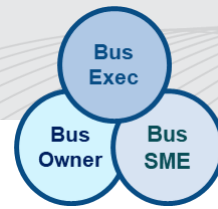
Business Responsibilities

Business Executive
- Ultimate responsibility for entire lines of business and the verticals within them
- Defines overarching strategy and goals for the business
- Focused on the successful general operation and profitability of the line of business
- Sets revenue and growth targets to accomplish strategy across verticals, securing funding
- Responsible for business outcomes and ROI

Business Owner
- Ensure priorities of ARTs align with the Portfolio strategy
- Verify investments are spent on the right things at the right time
- Actively take part in preparation for the upcoming PI
- Attend PI Planning, I & A, Demos
- Influence prioritization
- Provide key insights on translation of strategic intent into Epics/Features

Business SME
- Has deep knowledge in a specific Business domain
- Works with Agile Teams and ARTs
- Leverages domain expertise to generate value oriented backlog items with the teams
- Continues connecting strategy to execution as we move from Features to Stories
- Partners with Product and technical SMEs

Business Role Impact Spans the Framework
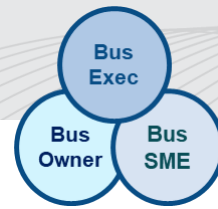
▶ Enterprise

   – Enterprise Executives and Business Executives
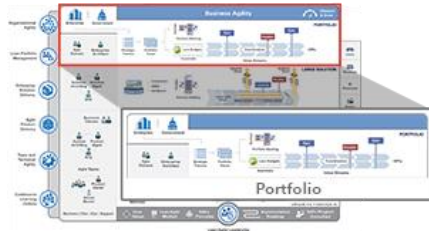
▶ Portfolio

   – Business Executives and Business Owners
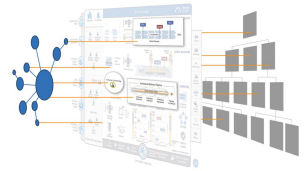
▶ ART

   – Business Owners and SMEs

▶ Team

   – Business SMEs

Participation is Just-In-Time, Just Enough, and at the Right Level
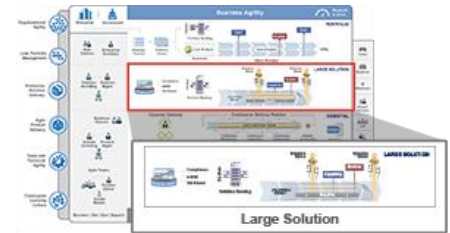
Balancing Business, Product, Architecture

The balancing act between Business, Product and Arch/Eng

▶ Business Owners define the business strategy and associated funding
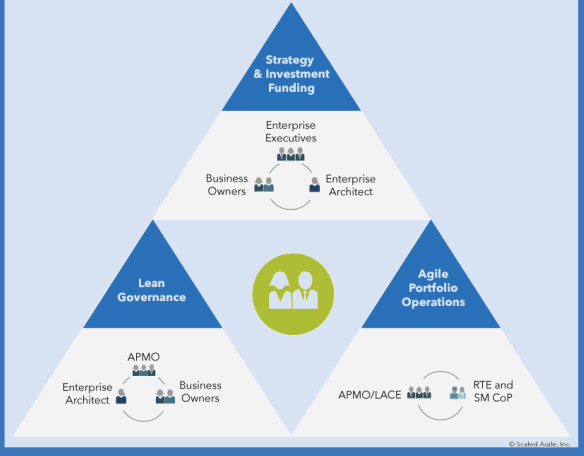
▶ Product Management connect business goals to execution by focusing on the customer
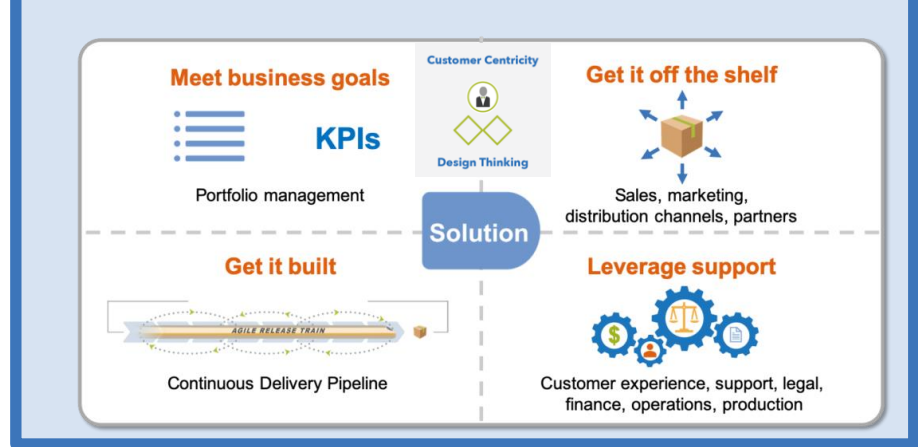
▶ Architecture/Engineering plays a key roll to define Enablers
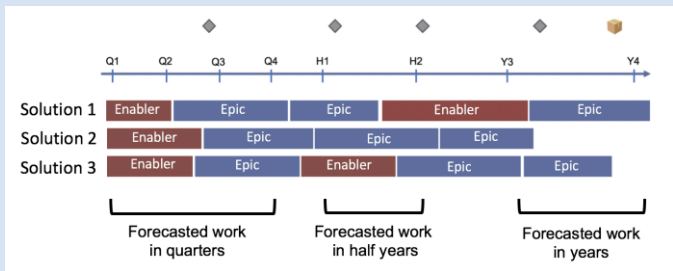
Participating in Framework Flow

Where the Business Participates in Framework Flow

ENTERPRISE (Initiative)

PORTFOLIO (Epic)

PROGRAM (Feature)

TEAM (Story)

CEREMONIES

Low — Frequency — High — Enterprise

Enterprise

Every PI/Quarter/Yr
- Enterprise Planning

Every Month/Qtr
- Cross-Portfolio Sync

Portfolio ...n
Portfolio 2
Portfolio 1

Every PI/Quarter
- Portfolio Priority Planning

Every Month
- Executive Review

Every Week
- Portfolio Leadership Team sync
- Epic Owner Sync
- Refinement

Program 1
2
...n

Every PI/Quarter
- PI Planning
- Inspect and Adapt

Every Month
- Business Owner Sync

Every Iteration
- System Demo

Iteration = 2 weeks
PI = 12 weeks

Every Week
- Scrum of Scrums
- PO Sync
- Refinement

Agile Team

Team .n
Team 2
Team 1

Every Iteration
- Plan
- DSU
- Review/Demo
- Retrospective
- Refinement

Waterfall Team
Team

Leadership Triangles
- 🟣 PMO / Delivery
- 🔵 IT / Architecture
- 🔴 Business / Product

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Where the Business Participates in Framework Flow

Denotes Business participation

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BO Time in Enterprise, Portfolio and ART Ceremonies

Business Team Impact Spans the Framework
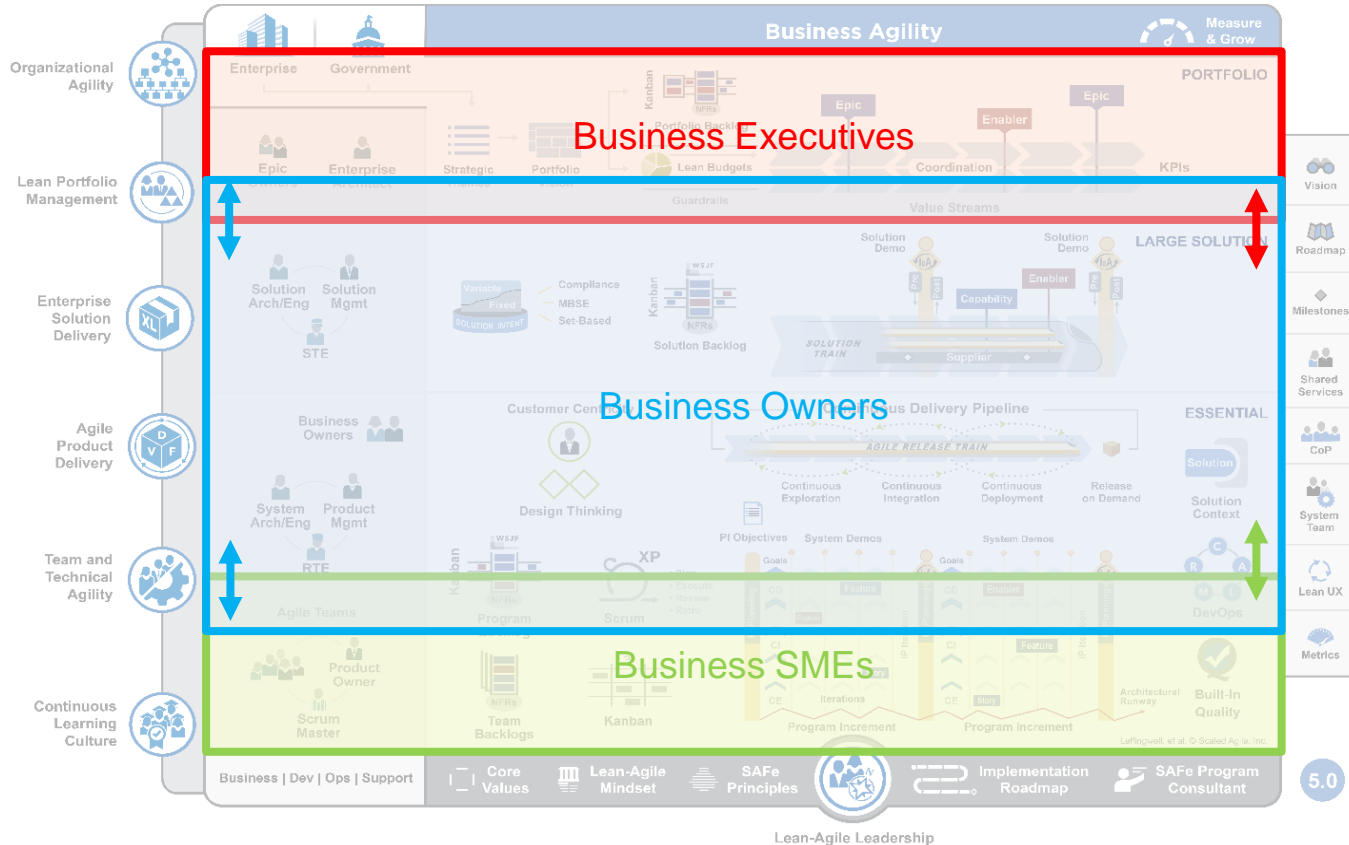
Participation is Just-In-Time, Just Enough, and at the Right Level

Timeline View of Participation and Collaboration

Program PI Objectives

PI 1

Program Backlog

Iteration 1.1	Iteration 1.2	Iteration 1.3	Iteration 1.4	Iteration 1.5
• Scrum of Scrums • PO Sync • System Demo 🔴	• Scrum of Scrums • PO Sync • System Demo 🔴	• Scrum of Scrums • PO Sync • System Demo 🔴	• Scrum of Scrums • PO Sync • System Demo 🔴	• Innovation • I&A Workshop 🔴 • PI Planning 🔴

PI 2

IP

Repeat

Execute the current PI
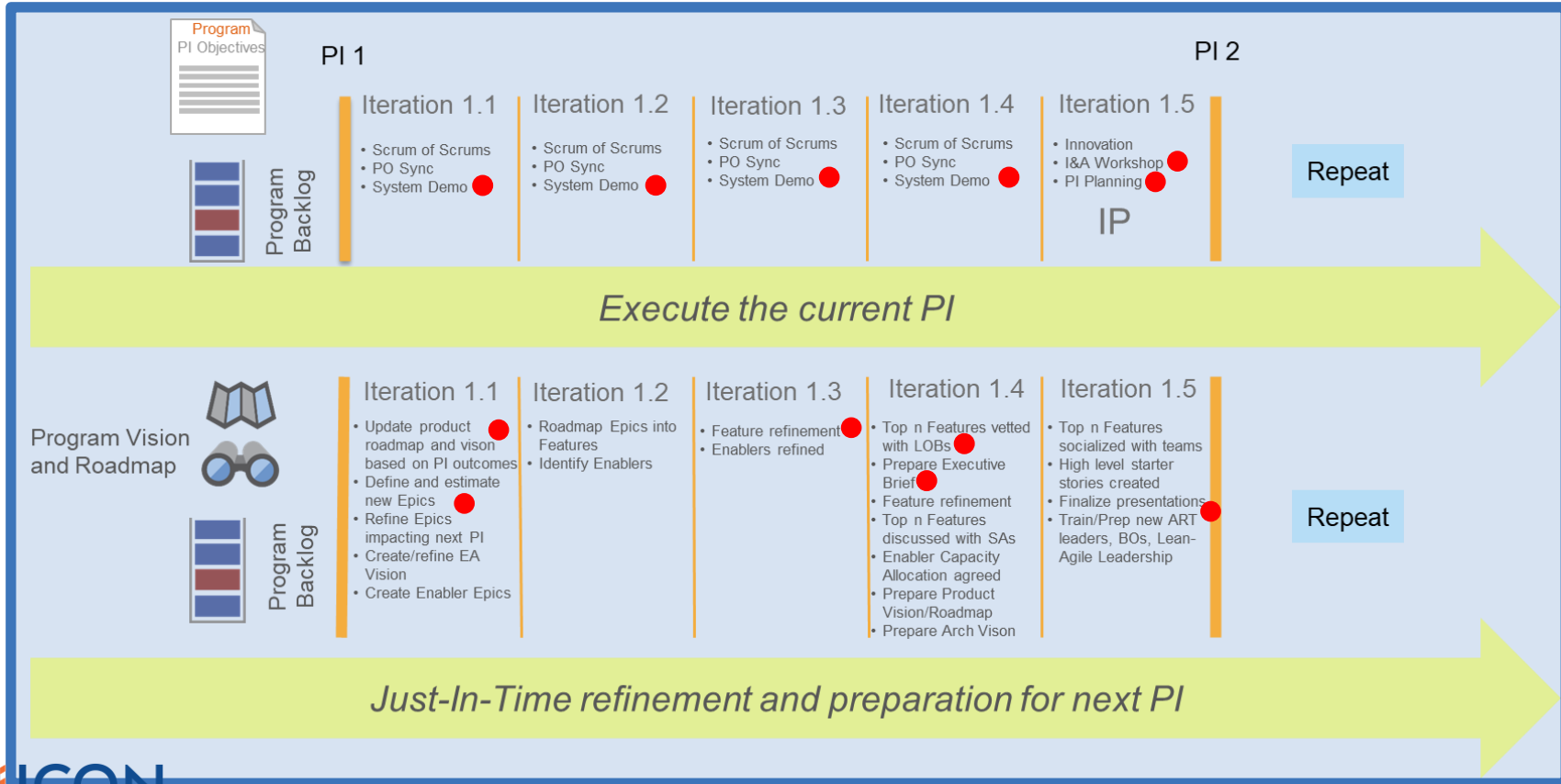
Program Vision and Roadmap

Program Backlog

Iteration 1.1	Iteration 1.2	Iteration 1.3	Iteration 1.4	Iteration 1.5
• Update product roadmap and vison based on PI outcomes 🔴 • Define and estimate new Epics 🔴 • Refine Epics impacting next PI • Create/refine EA Vision • Create Enabler Epics	• Roadmap Epics into Features • Identify Enablers	• Feature refinement 🔴 • Enablers refined	• 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 Vison	• 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

🔴 *Denotes Business participation*

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Approximate Time Needed? (Example Only)

ICON AGILITY SERVICES

	Event	Duration	BO Team	Frequency
PI Preparation	Portfolio Planning	1+ days	Business Execs	Quarterly or more
	Portfolio Sync	1 hour	Business Execs/Owners	Monthly or more
	Epic Refinement	1 hour	Business Owners	Monthly or as needed
	Feature Refinement	1 hour	Business Owners/SMEs	As needed fortnightly
PI Planning Event	Business Briefing/Prep	< 1 hour	Business Exec/Owner	Once per PI (day 1)
	Draft Plan Review	1 hour	Business Owners	Once per PI (day 1)
	Management Review	1 hour	Business Owners	Once per PI (day 1)
	Final Plan Review	1 hour	Business Owners	Once per PI (day 2)
	Confidence Vote	< 15 minutes	Business Owners/SMEs	Once per PI (day 2)
PI Executn	System Demos	1 hour	Business Owners/SMEs	Fortnightly
	Portfolio Sync	1 hour	Business Owners	Monthly or more
	Inspect and Adapt Wkshp	4 hours	Business Owners	Once per PI (during IP)

Summary

- **Business Owners maintain the connection between Strategy and Execution**

- **Business Owners are involved in key Enterprise, Portfolio and ART ceremonies**

- **Pragmatically decide who the Business Owners and other key business stakeholders are and how much of their time you need**