3Pworx-Präsentation beim
Pma focus 2018 in Wien

„Das agile SAFe Framework und die Umsetzung in der Praxis
Wie der Umstieg z.B. von einem klassischen Projektmanagementmodell auf das agile SAFe Framework gelingen kann“

Andreas Hock, Partner

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Firmenvorstellung

- Full-Size Anbieter für Prozess- und Projektmanagement mit den Schwerpunkten
  - Projektmanagement - Beratung, Realisierung und Technologie
  - Systemisches und nachhaltiges Projektmanagement
  - PM-Tools, PM-Einführung und Optimierung, Trainings
- Projektmanagement Best-Practices
- Einsatz von innovativen Technologielösungen

- Maßgeschneidertes Leistungs- und Lösungsportfolio
- Vielfältiges Seminar- und Trainingsprogramm
- Eigenständiges 3Pworx Projektmanagement – Kompetenzmodell
- Eigene Softwareentwicklungen (Add-Ons) und spezielle IT-Branchenlösungen für Projekt- und Portfoliomanagement
- **Alle Leistungen, Lösungen, Trainings siehe www.3Pworx.com**
- https://www.3pworx.com/news-events-veranstaltungen/pm-round-2018/
- **Download: Studie zum Agilen Projektmanagement zum Thema „KANBAN klassisch vs. Im Tool“ von der SPM Frühjahrstagung am 24. Mai im Technopark Zürich**
- **Laden Sie sich die Zusammenfassung der Umfrageergebnisse SPM FJT 2018 hier herunter.**

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Gründe für agiles Projektmanagement

- Produkt- bzw. Softwareentwicklung ist zu langsam oder braucht zu viel Zeit
- Wettbewerb setzt bereits agile Methoden ein
- Wettbewerb bringt Produkte häufiger und schneller auf den Markt
- Reaktion auf Kundenwünsche, die Entwicklung zukünftig agil zu betreiben
- Reaktion auf Kundenbedürfnisse, schneller Änderungen in den Produkt-Anforderungen umzusetzen
- Kundenanfragen können schneller und effizienter umgesetzt werden
- Zunahme der Digitalisierung der Prozesse und Produkte (hohe Innovationsgeschwindigkeit)

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Agiles Projektmanagement: Wesentliche Merkmale

- Agiles Projektmanagement beinhaltet sämtliche Methoden, Abläufe und Techniken zur iterativen und inkrementellen Planung, Steuerung und Abschluss von Projekten
- Projekte werden anfangs nicht vollständig ausgeplant, eine Adaptierung des Umfanges und der Ziele ist auch während der Projektabwicklung möglich
- „Selbstorganisation“ von „cross-functional“ Projekt-Teams und „Selbstverantwortung“ bei der Umsetzung
- Visualisierung der Aufgaben in einer Iteration durch spezielle Boards
- Selbstreflexion der Teams über das „Erreichte“ mit dem Ziel der Effizienzsteigerung in zukünftigen Sprints

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Lean Agile Enterprise Roadmap

„Make sure your organization is prepared and ready to make the agile transition“

x weeks | *x weeks* | *x weeks*

Initiative Steps

- Identify gaps, impediments and show-stoppers to agile migration and adoption
- Establish the appropriate organization environment and mindset
- Identify relevant agile methods and techniques
- Identify most areas of business that can most benefit from early adoption

Ensuring a smooth „warm start“

Lean-agile Pilot

- Pick a pilot based on defined criteria (Complexity, Ownership, Relevance, Duration, Business Value, etc.)
- Define clear pilot goals with strong relevance to the future agile rollout
- Test Drive your agile initiative work methods and ceremonies
- Decision for further implementation
- Prepare governance model (agile leadership)
- Prepare Continuous Integration

Lean-agile Execution

- Establish communities of practice
- Rollout based on broader scale using lessons learned
- Rollout the transformation pilot into the enterprise (mass deployment)
- Procurement and provision of required capacities for agile roles
- Provision of agile tools setup, tools trainings

Lean-agile Coaching

- Deeper implementation of agile mindsets and techniques
- Support agile ceremonies with the help of agile coaches
- Establish agile knowledge base for education and learning
- Different types of hands-on support

Planning and steering through accurate project metrics

Measure and communicate success

Kick Off | Milestone / Checkpoints

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Scaled Agile Framework® (SAFe®)

250,000
SAFe-trained professionals in 110+ countries

180
Scaled Agile Partners in 50 countries

70% US *Fortune* 100 enterprises have SAFe-trained professionals

2 million
Annual visitors to SAFe and Scaled Agile websites

Pledged 1%
Scaled Agile stock equity & employee time to Pledge 1% campaign

SAFe SUMMIT

Training

A comprehensive role-based curriculum for successfully implementing SAFe and skills validation through professional certification.

SAFe Certified

Freely Available

SAFe's knowledge base is freely available at **scaledagileframework.com**

Configurable

SAFe is able to accommodate enterprises of all sizes and industries

Fastest Growing Method

SAFe cited as preferred solution for scaling Agile:

- **2017 Agile in the Enterprise survey by Gartner Research**
- **12th Annual State of Agile Report by VersionOne**
- **2017 Scaling Agile Report by cPrime**

SAFe CASE STUDIES

30 - 75% Faster Time-to-Market

25 - 75% Increase in Productivity

20 - 50% Improvements in Quality

10 - 50% Increased Employee Engagement

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Scaled Agile Framework® (SAFe®) - History

2017	SAFe 4.5 released
2016	SAFe 4.0 released
2011	SAFe 1.0 released
	Agile Software Requirements published
2007	*Scaling Software Agility published*
2006	Joint development at BMC Software
2005	Dean Leffingwell creates Scaling Agile model

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Scaled Agile Framework® (SAFe®): Agile Principles

#1 - Take an economic view

#2 - Apply systems thinking

#3 - Assume variability; preserve options

#4 - Build incrementally with fast, integrated learning cycles

#5 - Base milestones on objective evaluation of working systems

#6 - Visualize and limit WIP, reduce batch sizes, and manage queue lengths

#7 - Apply cadence, synchronize with cross-domain planning

#8 - Unlock the intrinsic motivation of knowledge workers

#9 - Decentralize decision-making

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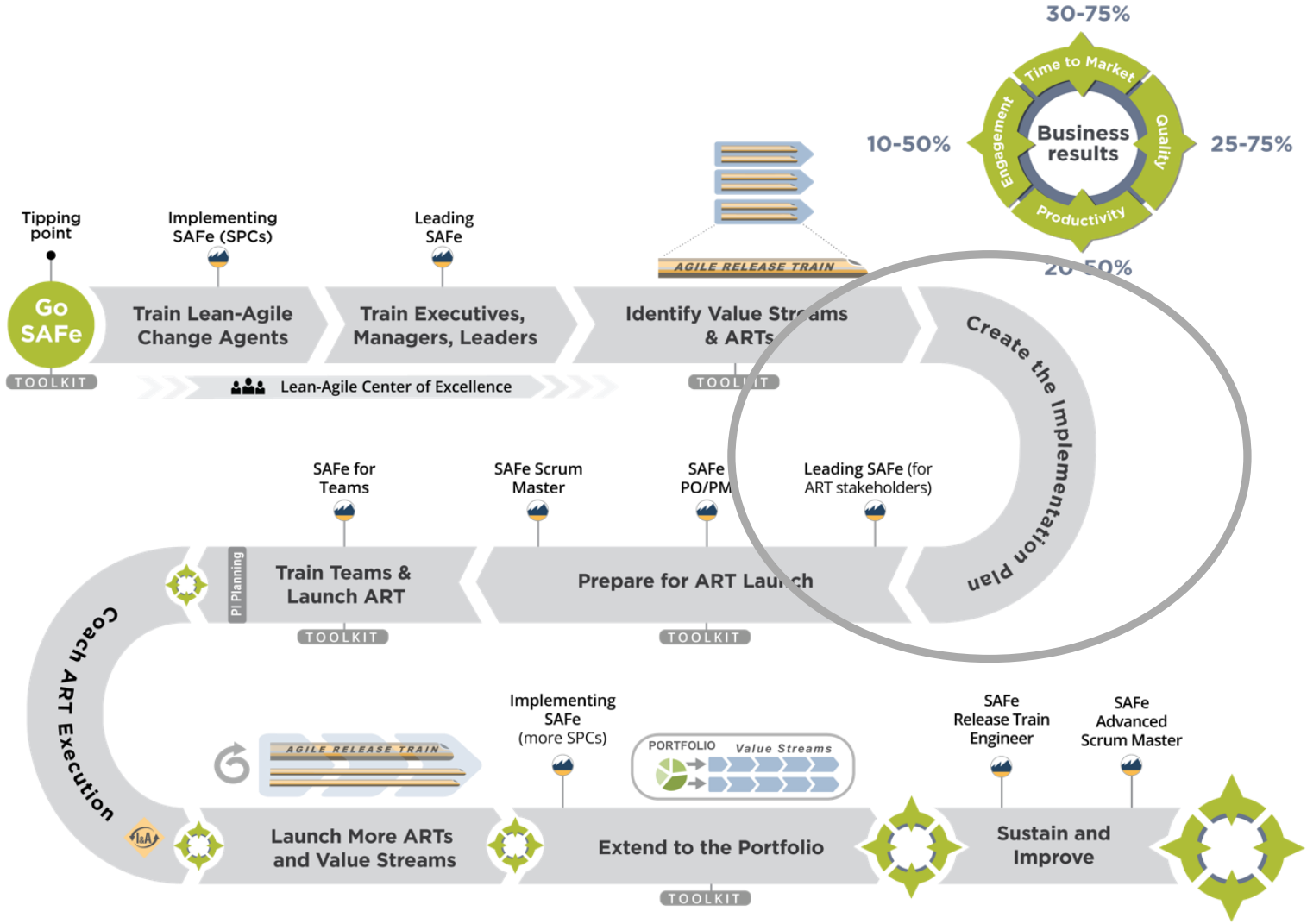
Example: Portfolio SAFe®: Implementation Roadmap



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Traditional Approach vs. Lean-Agile Approach

Traditional Approach		Lean-Agile Approach
#1 Centralized control	→	Decentralized decision-making
#2 Project overload	→	Demand management; continuous value flow
#3 Detailed project plans	→	Lightweight, epic-only business cases
#4 Centralized annual planning	→	Decentralized, rolling-wave planning
#5 Work breakdown structure	→	Agile estimating and planning
#6 Project-based funding and control	→	Lean-Agile budgeting and self-managing Agile Release Trains
#7 Waterfall milestones	→	Objective, fact-based measures and milestones

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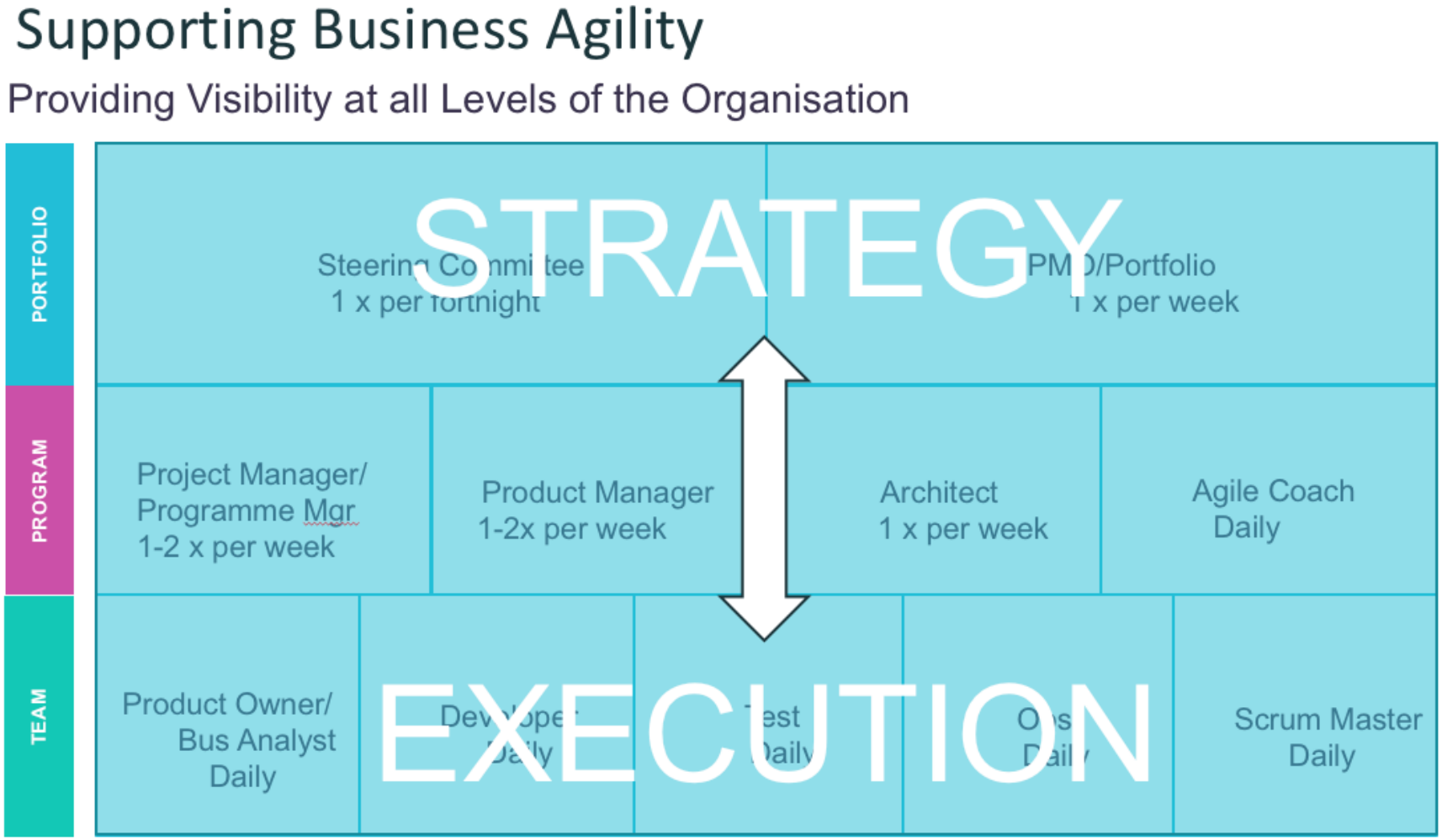
SAFe: Software supporting Business agility



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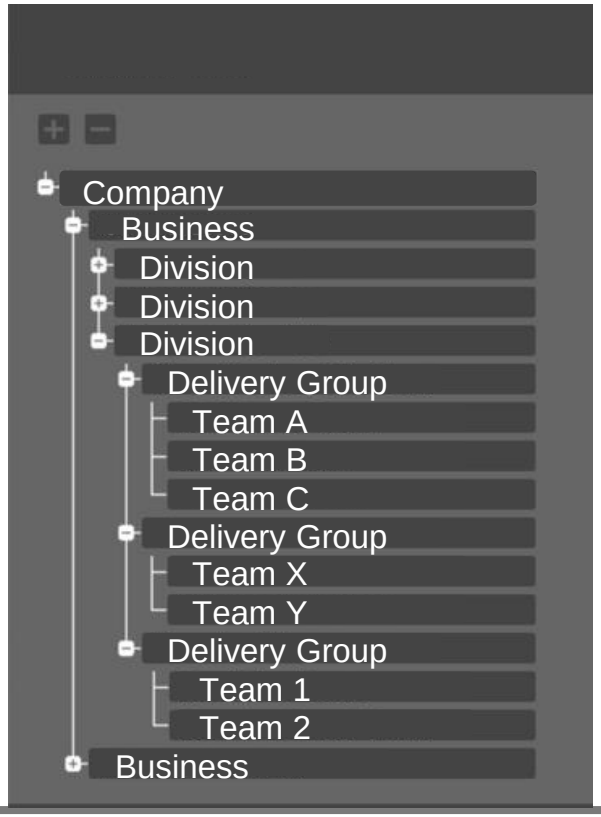
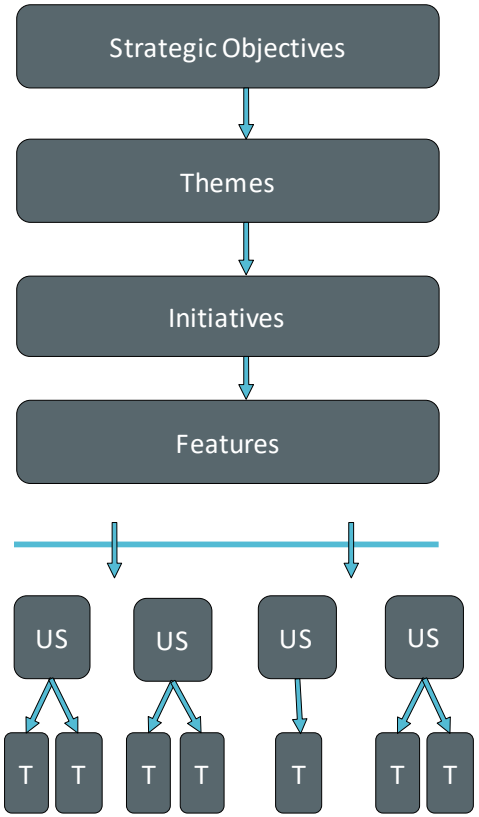
SAFe: Agile PPM requires data across 3 Dimensions

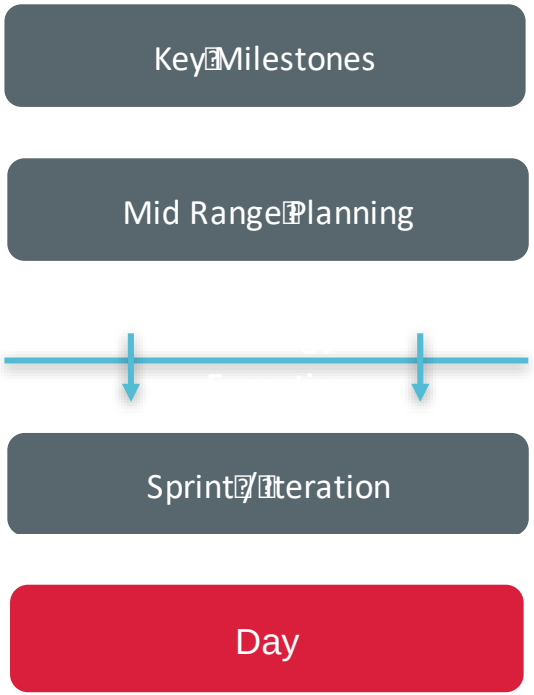
Organizational Hierarchy



Work Item Relations



Time



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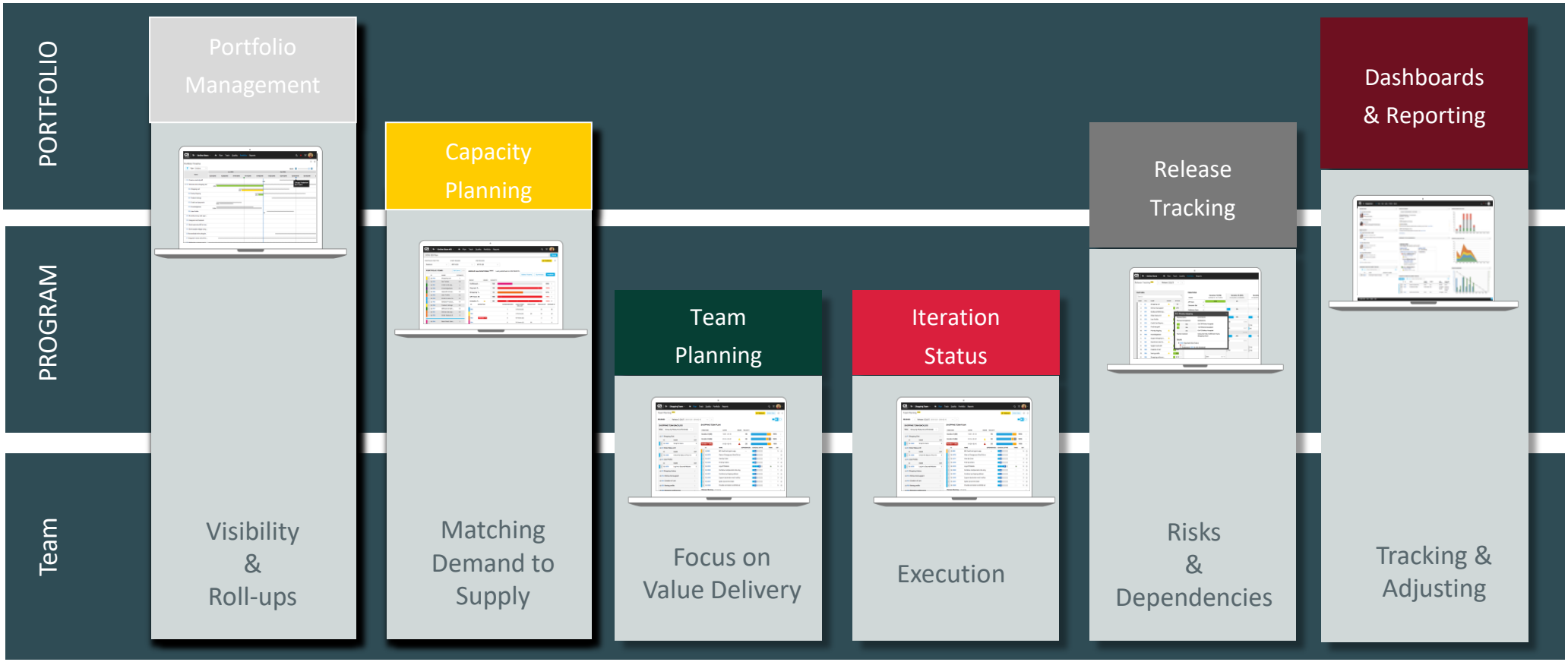
SAFe: Portfolio, Program and Team Delivery



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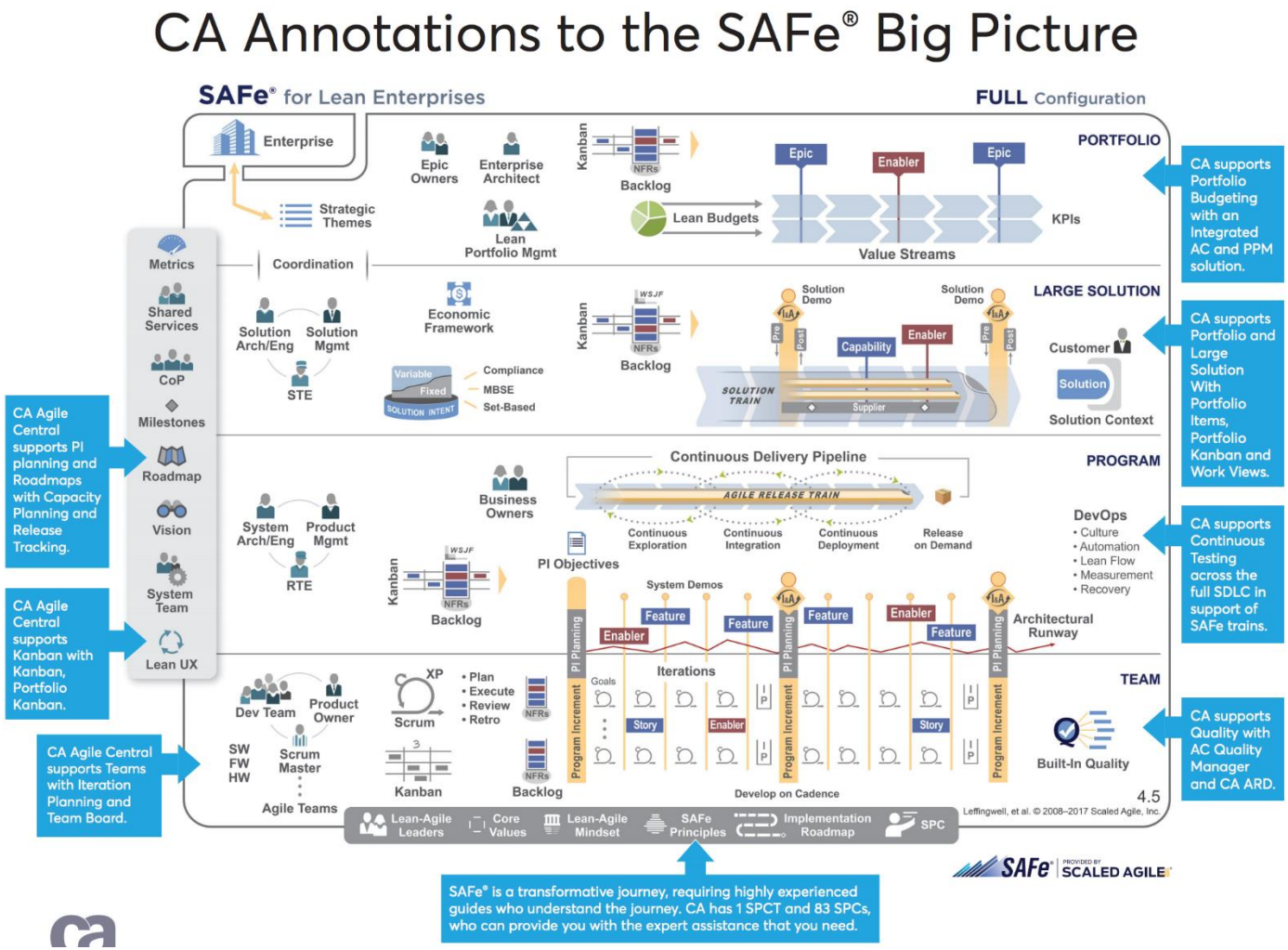
SAFe Implementation: Which software can be used?



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Q&A

- Agiles PM mit SAFe: Wie würden Sie sich entscheiden?

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Kontakt

3Pworx GmbH
Beratung für Prozess- und Projektmanagement

Landshuter Allee 8-10
80637 München
Telefon: +49 (0)89 - 44 23 86 52
Mobil: +49 (0)163 - 8 20 60 17
E-Mail: Andreas.Hock@3Pworx.com

www.3Pworx.com

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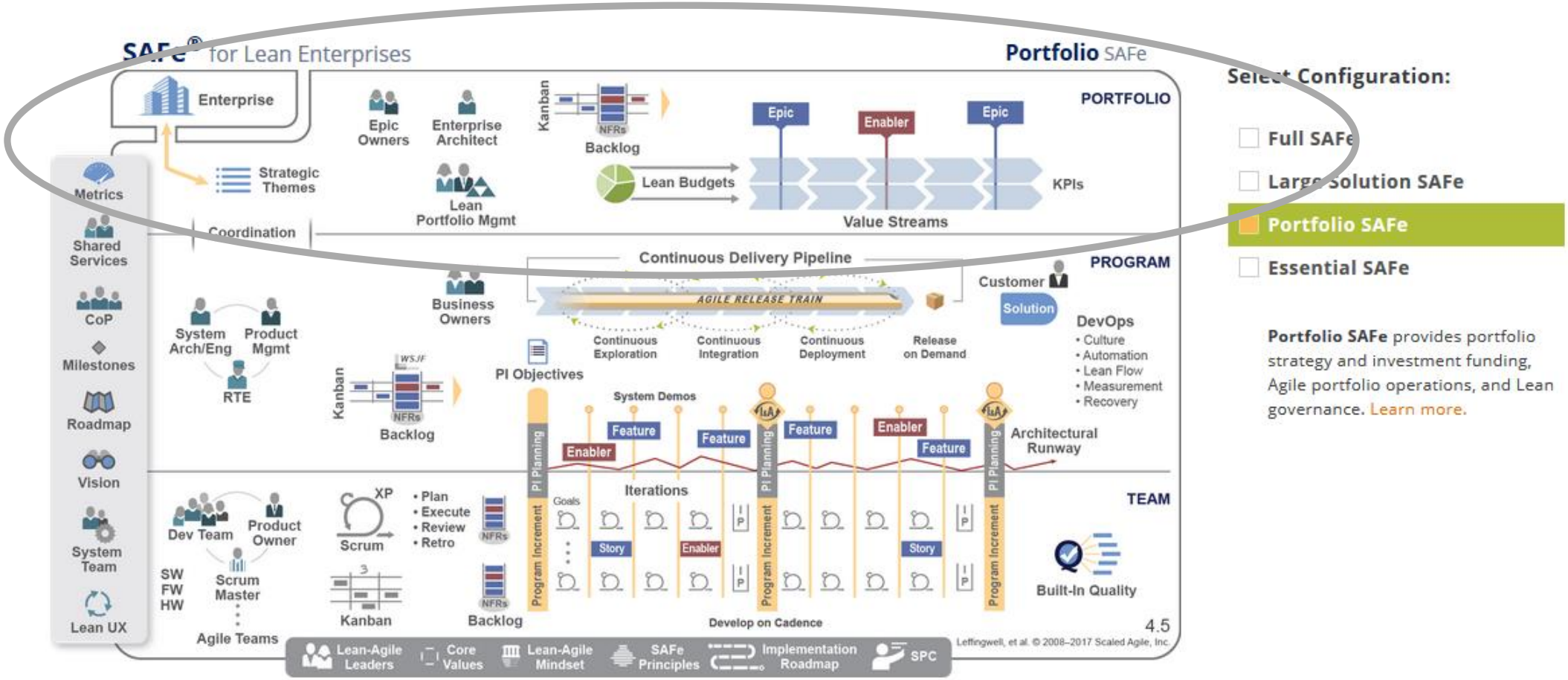
Overview of Portfolio SAFe®



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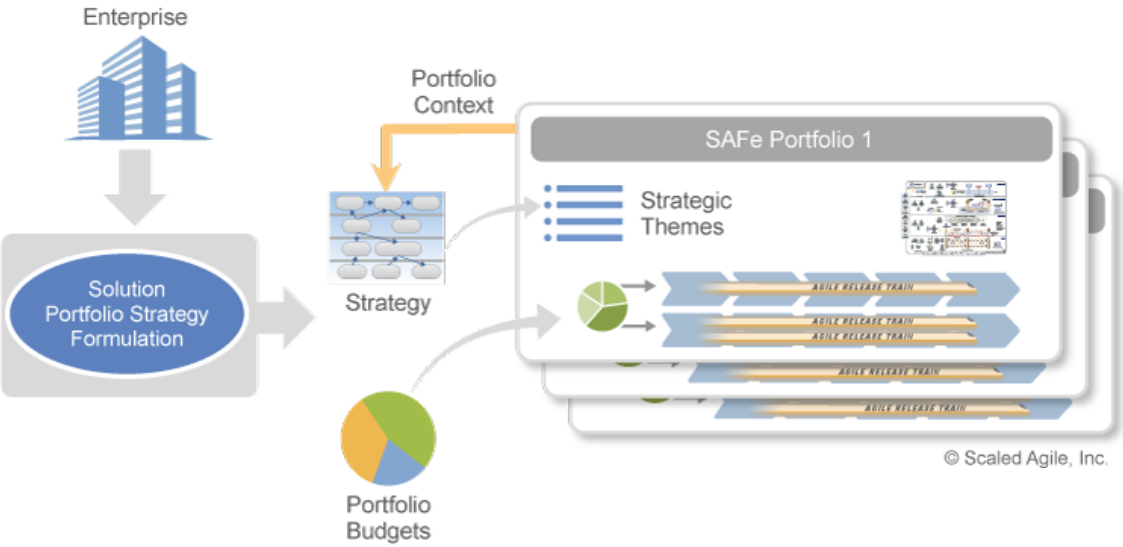
Portfolio SAFe®: Portfolio Strategy Formulation



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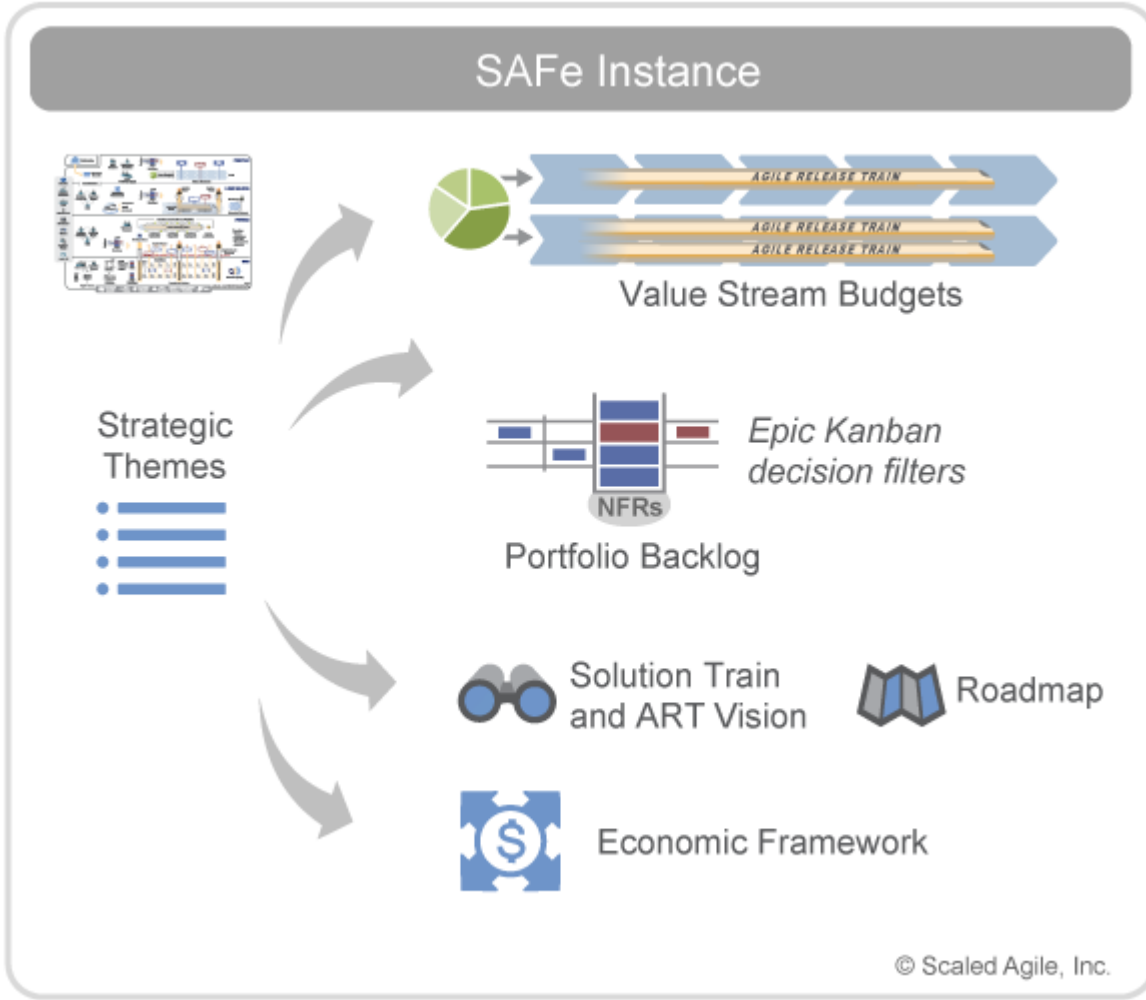
Portfolio SAFe®: Strategic Themes



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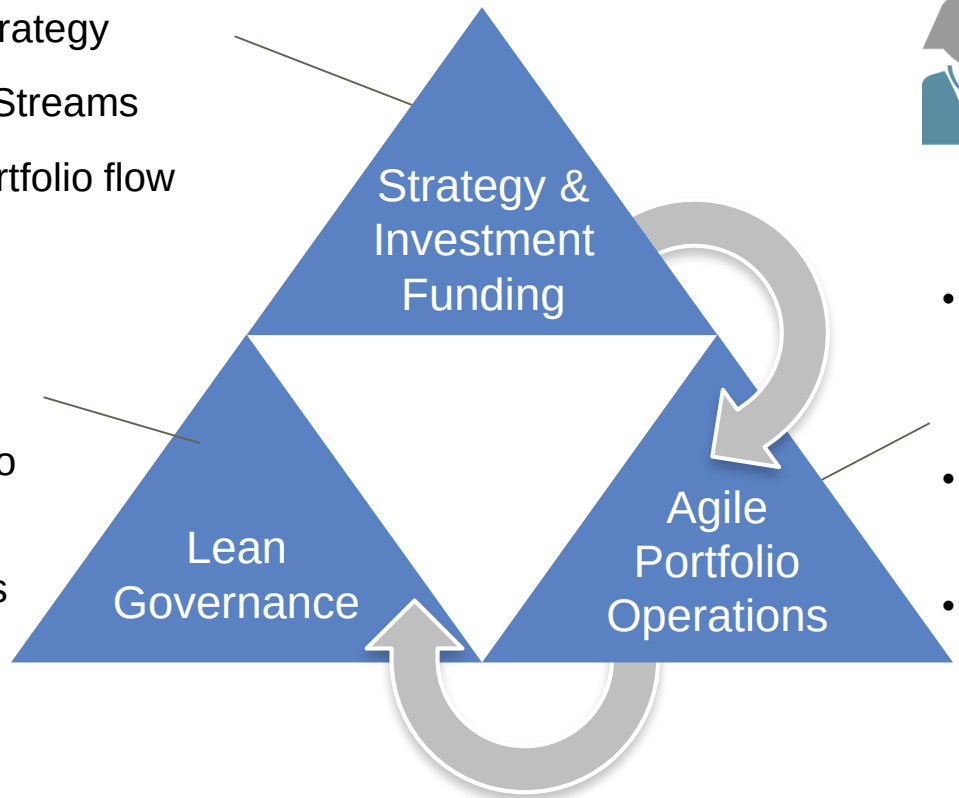
Portfolio SAFe®: Lean Portfolio Management

- Connect the portfolio to enterprise strategy
- Fund Value Streams
- Establish portfolio flow



- Support Agile PMO, LACE, RTE and SM CoP
- Coordinate Value Streams
- Sustain and improve

- Forecast and budget dynamically
- Measure Lean portfolio performance
- Coordinate continuous compliance

RTE = Release Train Engineer
PMO = Project Management Office
SM CoP = Scrum Master Code of Practice

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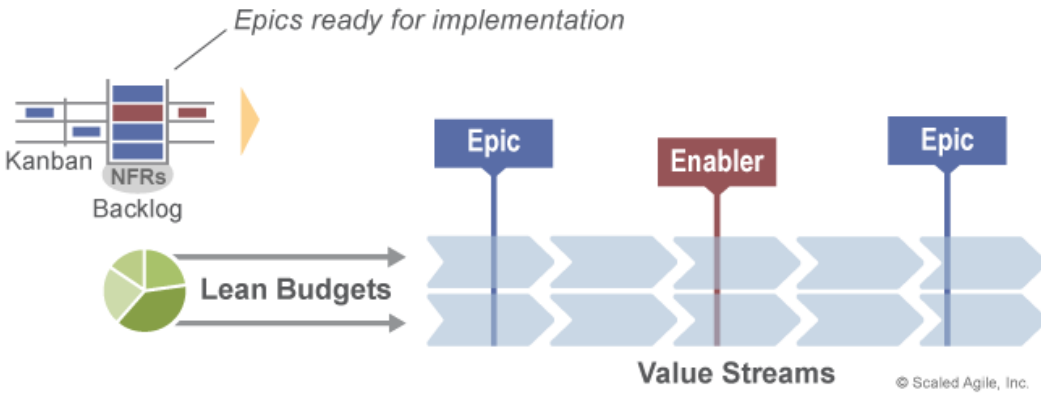
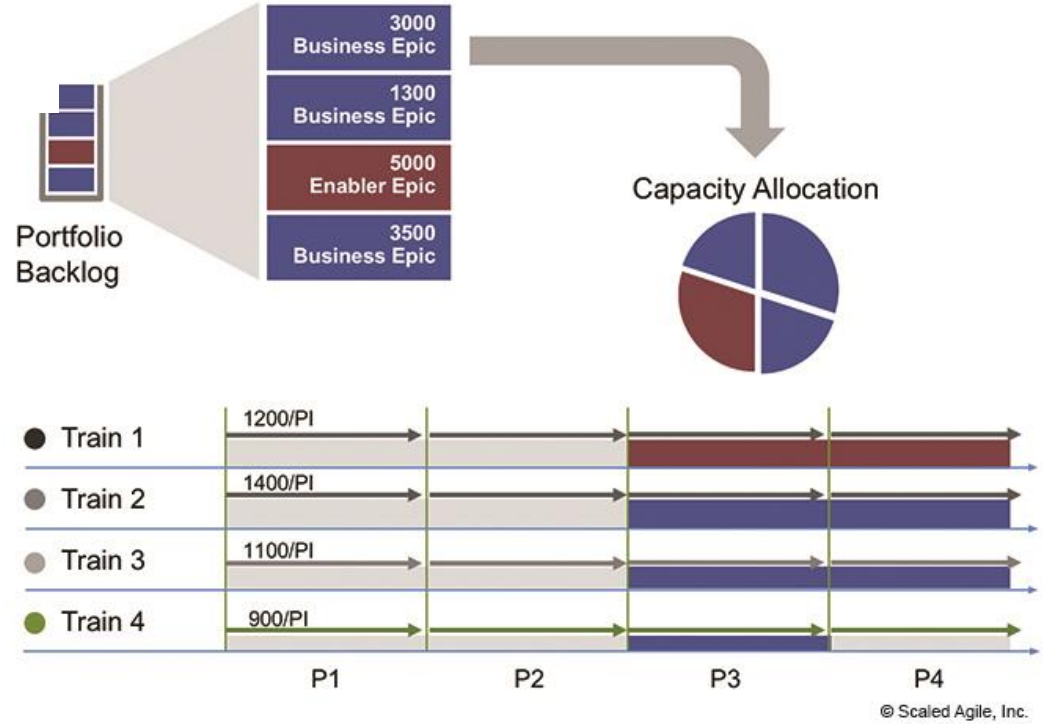
Portfolio SAFe®: Portfolio Backlog





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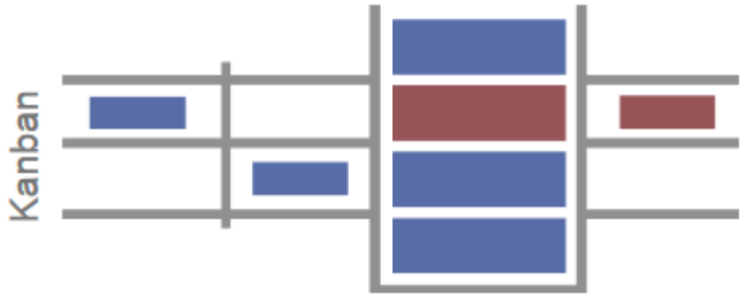
Portfolio SAFe®: Lean Kanban Backlog

- Makes largest business initiatives visible
- Brings structure to analysis and decision making
- Provides WIP limits to ensure the teams analyze responsibly
- Helps prevent unrealistic expectations
- Helps drive collaboration amongst the key stakeholders
- Provides a transparent and quantitative basis for economic decision-making



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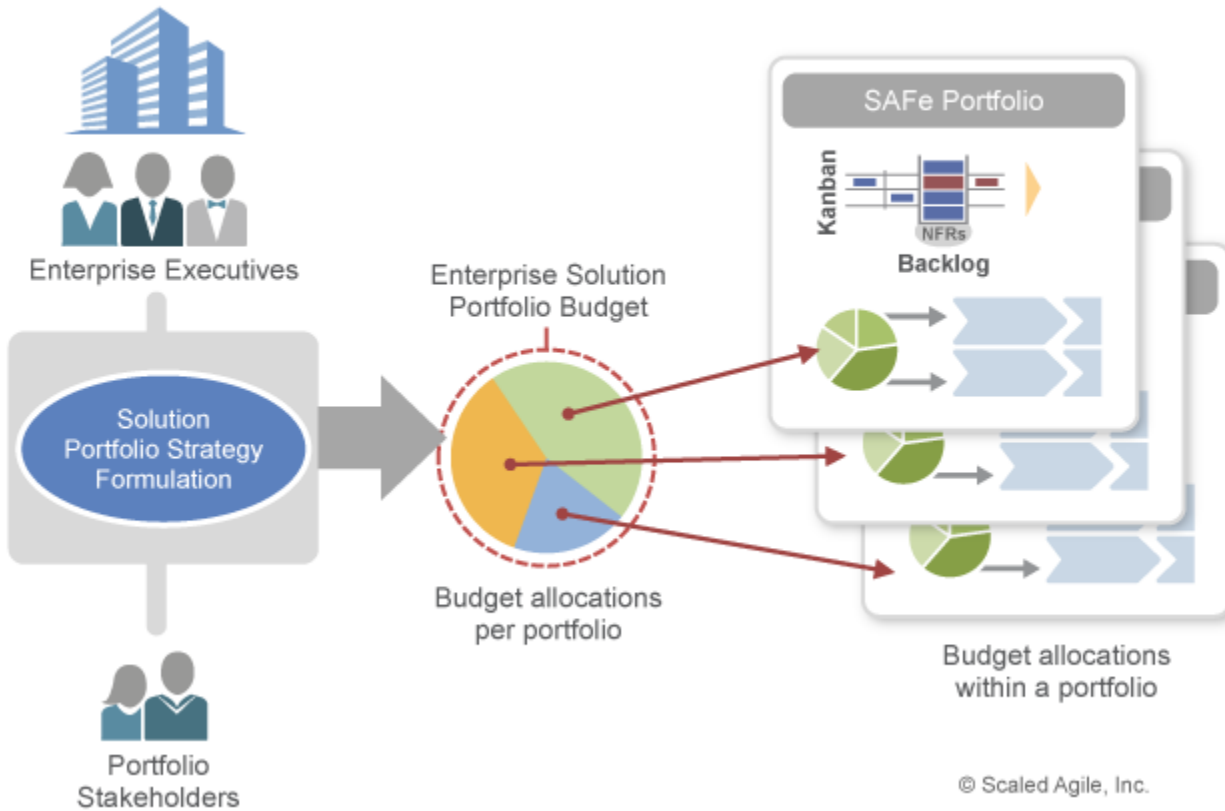
Portfolio SAFe®: Lean Budget



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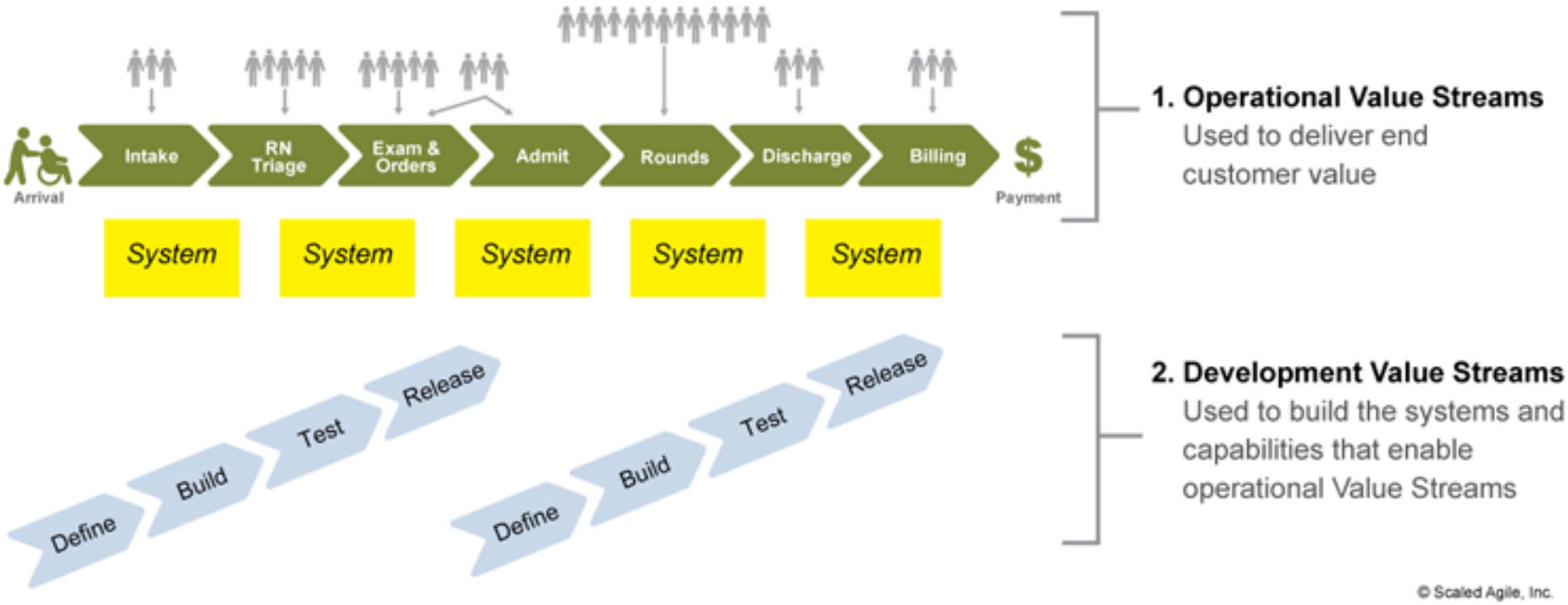
Portfolio SAFe®: Value Streams



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Portfolio SAFe®: Metrics

Benefit	Expected result	Metric used
Employee engagement	Improved employee satisfaction; lower turnover	Employee survey; HR statistics
Customer satisfaction	Improved Net Promoter Score	Net Promoter Score survey
Productivity	Reduced average feature cycle time	Feature cycle time
Agility	Continuous improvement in team and program measures	Team, program, and portfolio self-assessments; predictability measure
Time to market	More frequent releases	Number of releases per year
Quality	Reduced defect counts and support call volume	Defect data and support call volume
Partner health	Improving ecosystem relationships	Partner and vendor surveys

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Portfolio SAFe® - Hot facts (1)

- Portfolio is the highest level in SAFe model.
- Portfolio vision represents the organizations business strategy for the programs / solutions
- Business objectives are lead from business strategy and the business objectives steers the creation of strategic themes. The strategic themes provide the business context to the decision making in portfolio level.
- The critical decisions are needed for investments of value streams and release trains, as well as in portfolio and program backlog creation and prioritization. The essence of strategic themes is to provide differentiations from organizations current state to the future state.
- Lean canvas or many other methods can be used in business strategy creation as well as in the creation of strategic themes

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Portfolio SAFe® - Hot facts (2)

- Portfolio Value streams are input for the portfolio vision.
- Portfolio vision is realized in value streams.
- Value streams are implemented in release trains.
- Portfolio level backlog includes typically business and architecture needs whose scope is wider than one release train and those needs to be implemented in more than one release train.
- A value stream provides clear value to a customer or organization.
- A good tool for defining value stream is ‘Value Stream Mapping’.
- It is a tool where the flow of information needed to produce product or service to the customer is defined, documented, analyzed and improved
- Portfolio management has a deep understanding of portfolio vision and they are helping in value stream definitions and budget allocations for agile release trains as well as defining portfolio level epics.

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Portfolio SAFe®: Enablers

- Exploration enablers – support research, prototyping, and other activities needed to develop an understanding of Customer needs, to explore prospective Solutions and to evaluate alternatives
- Architectural enablers – are created to build the architectural runway, which allows smoother and faster development
- Infrastructure enablers – are created to build, enhance, and automate the development, testing, and deployment environments. They facilitate faster development, higher-quality testing, and a faster Continuous Delivery Pipeline
- Compliance enablers – facilitate managing specific compliance activities, including Verification and Validation (V&V), documentation and signoffs, and regulatory submissions and approvals

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Portfolio SAFe®: Summary

- Decentralized decision-making
- Demand management; continuous value flow
- Lightweight, Epic-only business cases
- Decentralized, rolling-wave planning
- Agile estimating and planning
- Lean-Agile budgeting & self-managing Agile Release Trains
- Objective, fact-based measures and Milestones

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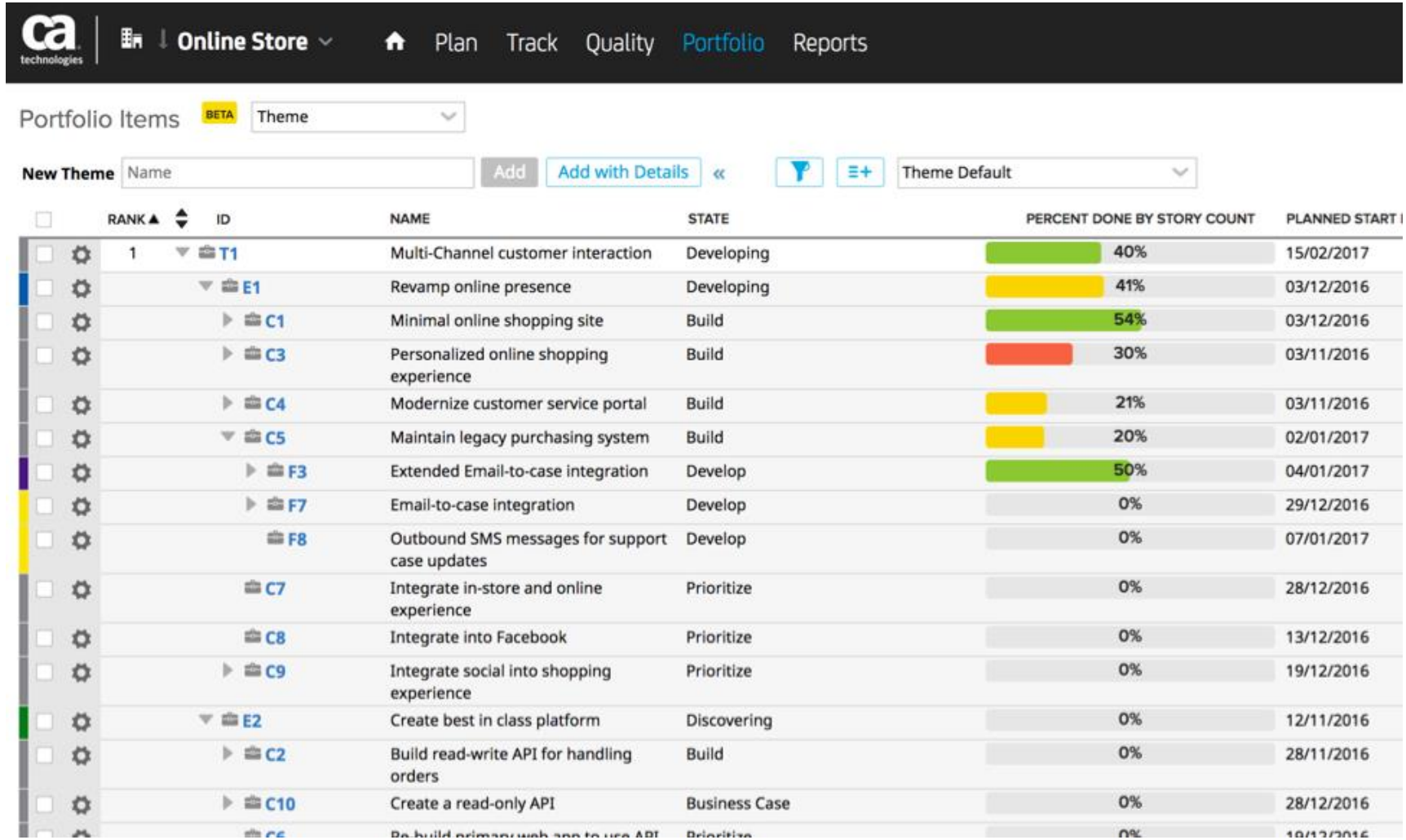
SAFe: agile PPM - Portfolio Items



RANK	ID	NAME	STATE	PERCENT DONE BY STORY COUNT	PLANNED START
1	T1	Multi-Channel customer interaction	Developing	40%	15/02/2017
	E1	Revamp online presence	Developing	41%	03/12/2016
	C1	Minimal online shopping site	Build	54%	03/12/2016
	C3	Personalized online shopping experience	Build	30%	03/11/2016
	C4	Modernize customer service portal	Build	21%	03/11/2016
	C5	Maintain legacy purchasing system	Build	20%	02/01/2017
	F3	Extended Email-to-case integration	Develop	50%	04/01/2017
	F7	Email-to-case integration	Develop	0%	29/12/2016
	F8	Outbound SMS messages for support case updates	Develop	0%	07/01/2017
	C7	Integrate in-store and online experience	Prioritize	0%	28/12/2016
	C8	Integrate into Facebook	Prioritize	0%	13/12/2016
	C9	Integrate social into shopping experience	Prioritize	0%	19/12/2016
	E2	Create best in class platform	Discovering	0%	12/11/2016
	C2	Build read-write API for handling orders	Build	0%	28/11/2016
	C10	Create a read-only API	Business Case	0%	28/12/2016

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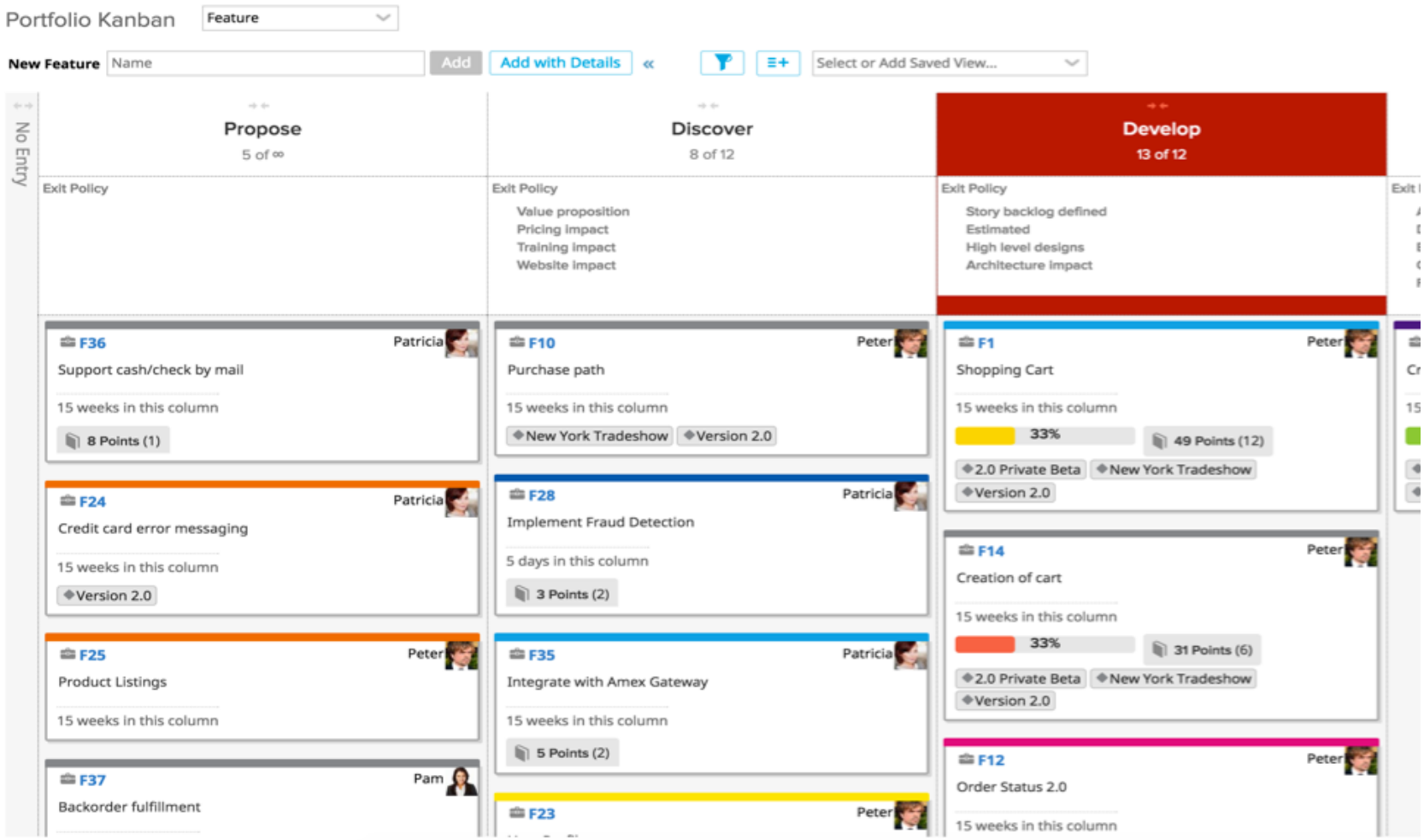
SAFe: agile PPM - Portfolio Kanban



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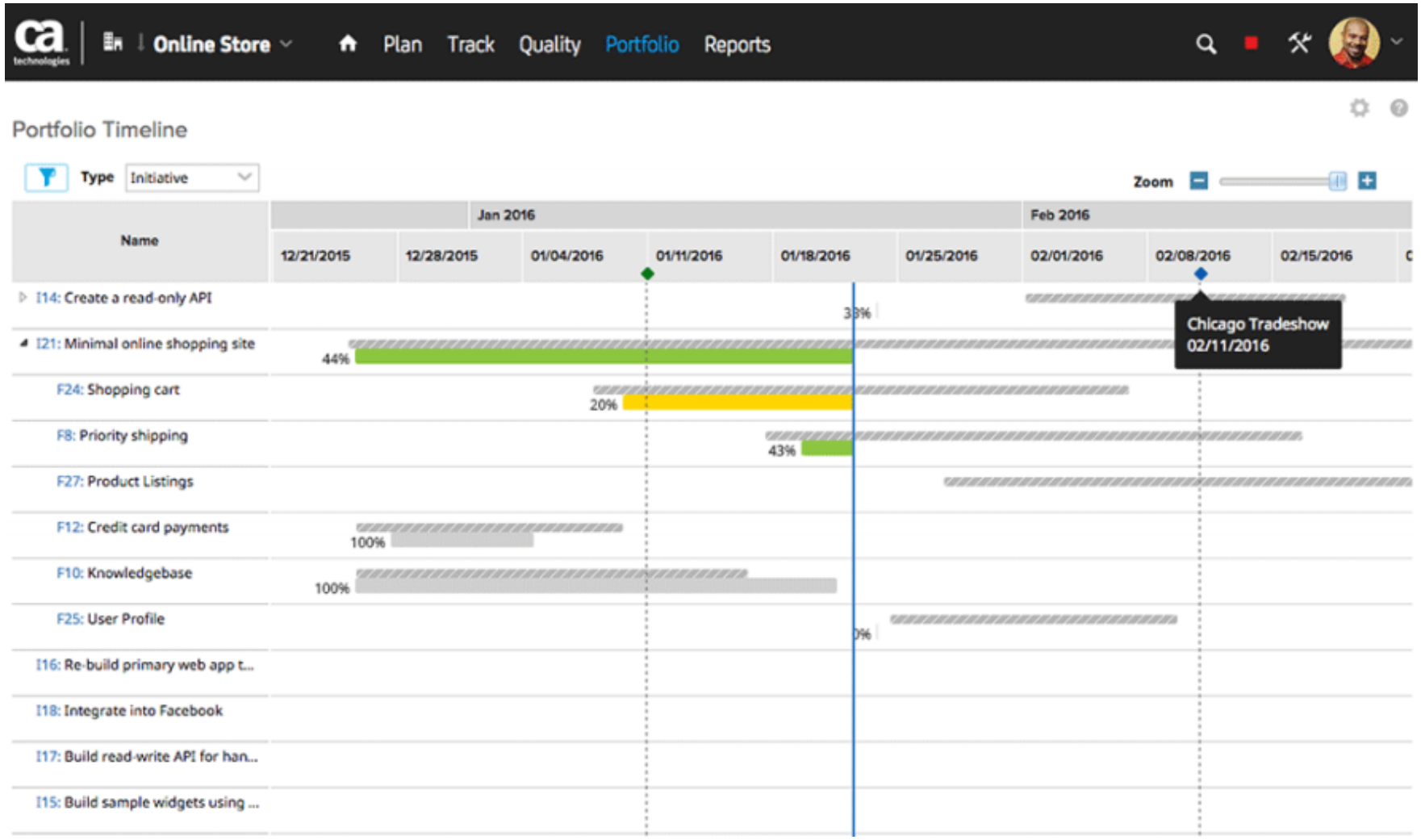
SAFe: agile PPM - Portfolio Timeline



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SAFe: agile PPM - Scoring

CA PPM

HOME | FAVORITES |

Properties | Contents Editor | Investments | Plans | Targets | Waterlines | Scorecard | Analysis | Capacity | Financials | Processes

Portfolio: Online Store Portfolio - *Waterlines*

Filter: None

Rank	Investment	Start	Finish	Required	Agile?	Strategy	Cost	Benefit	Architect	Fulfillment Team	Shopping Team	Risk
1	Compliance Audit - Security	12/13/16	5/14/17	✓		Corporate Compliance	250,000	300,000				
2	eCommerce Portal	8/15/16	5/3/17	✓		Increase Revenue	417,000	600,000	270.00			
3	PCI Controls Remediation	11/14/16	3/9/17	✓		Reduce Operational Cost	198,000	750,000	672.00			
4	Security Compliance	10/17/16	11/15/16			Corporate Compliance	349,200	400,000	176.00			
5	Maintain legacy purchasing system	8/31/16	10/25/16		✓	Provide Excellent Service	600,000	88,646			1,920.00	
6	Online Store V 2.0	4/3/17	5/2/17			Introduce New Products	150,000	150,000	176.00			
7	Minimal Online Shopping Site	8/31/16	1/17/17		✓	Introduce New Products	400,000	338,889		800.00	4,800.00	
8	Online to Offline Market	12/13/16	3/17/17			Enhance Online Presence	180,120	600,000	552.00			
9	Modernize customer service portal	9/14/16	12/8/16		✓	Provide Excellent Service	750,000	900,000			2,928.00	
10	Personalized online shopping experience	9/13/16	12/16/16		✓	Introduce New Products	400,000	382,400	248.00	2,208.00	4,416.00	
11	Data Warehouse Performance Tuning	10/14/16	2/23/17			Provide Excellent Service	317,200	500,000	160.00			
12	Executive Dashboard Visibility	10/14/16	2/6/17			Enhance Online Presence	264,400	300,000	176.00			
13	Office Upgrade	7/28/16	7/27/17			Provide Excellent Service	634,660	500,000	1,084.00			
14	System Upgrade Release 14	12/13/16	12/12/17			Reduce Operational Cost	376,340	490,000	1,152.00			
15	Online Order Entry	11/14/16	3/22/17			Increase Revenue	325,500	450,000				

Q3 2016 | Q4 2016 | Q1 201

	Cost	Benefit	Architect	Fulfillment Team	Shopping Team
Above Waterline:	3,294,320	4,127,535	1,848.00	800.00	9,648.00
Distributed Target:	3,350,000	3,000,000	1,320.00	4,800.00	9,840.00
Variance:	+55,680	-1,127,535	-528.00	+4,000.00	+192.00
Below Waterline:	2,318,100	2,622,400	2,820.00	2,208.00	4,416.00

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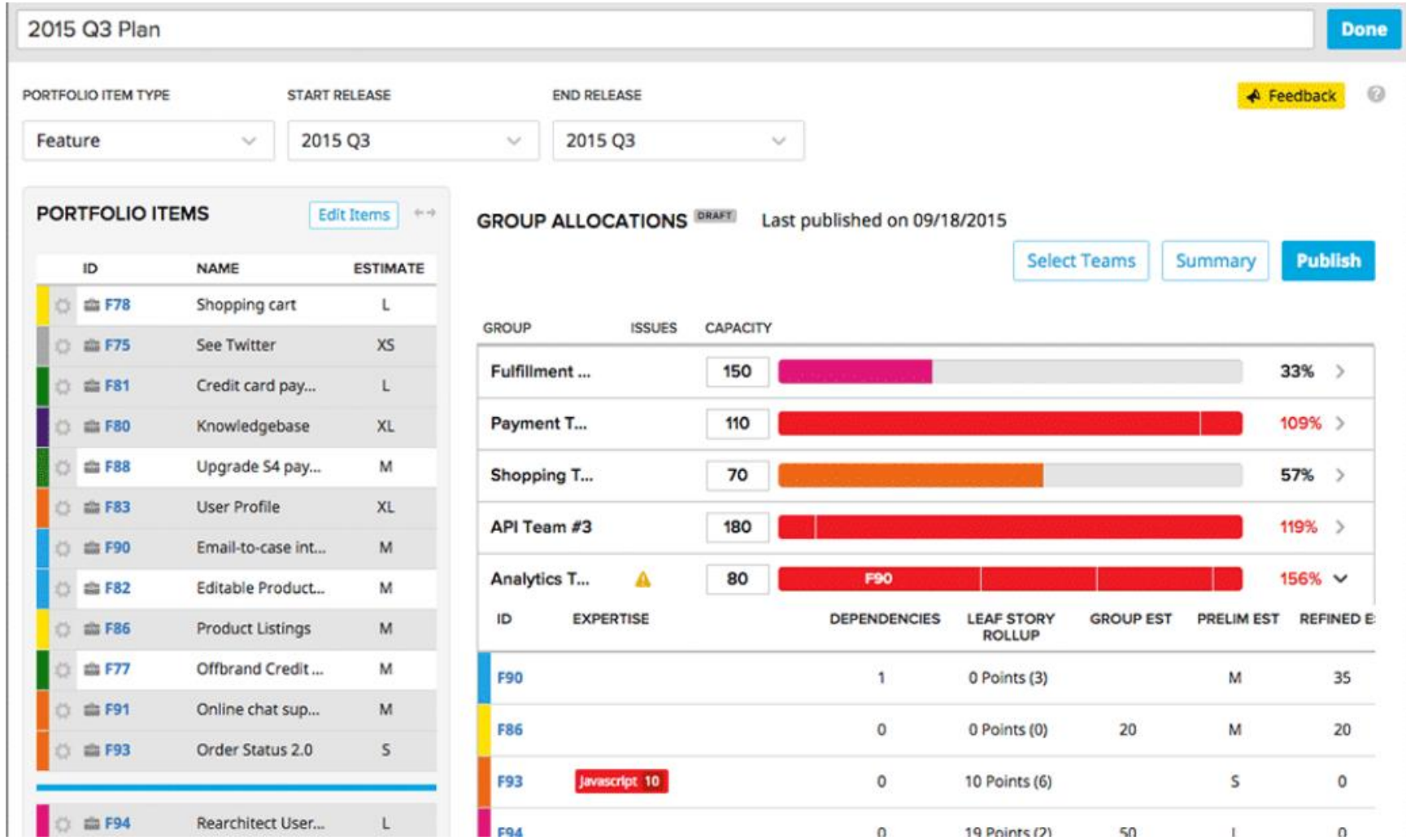
SAFe: agile PPM – Match Demand to capacity



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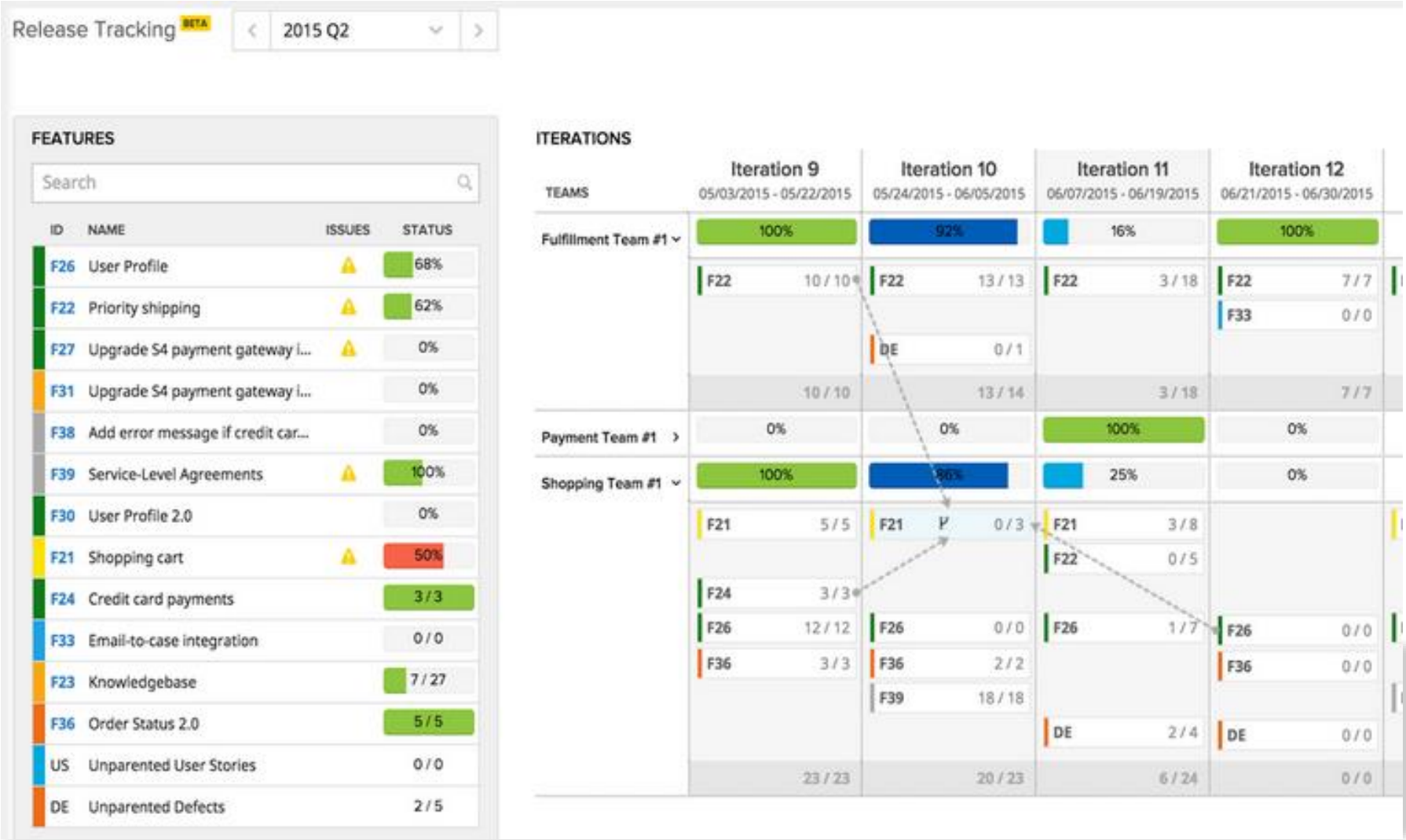
SAFe: agile PPM – Transition to Program Management



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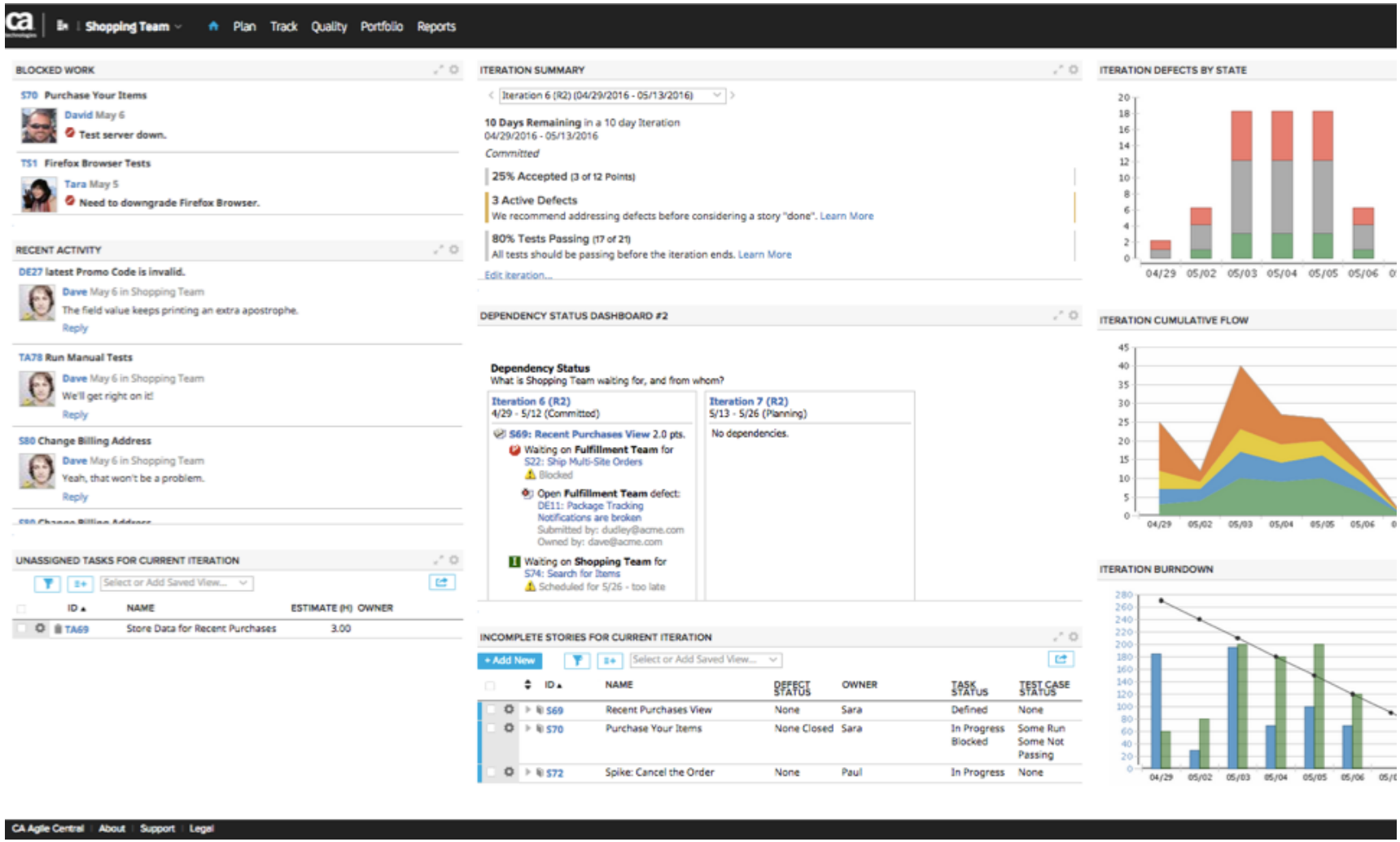
SAFe: agile PPM – Reporting



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