

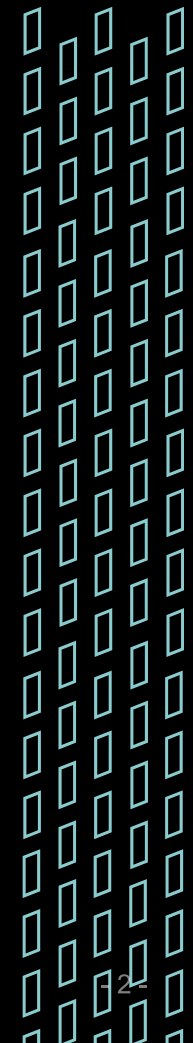
Jim Fowler

Strategic Advisor and SPCT

Scaled Agile



What is the goal of agile in an enterprise?







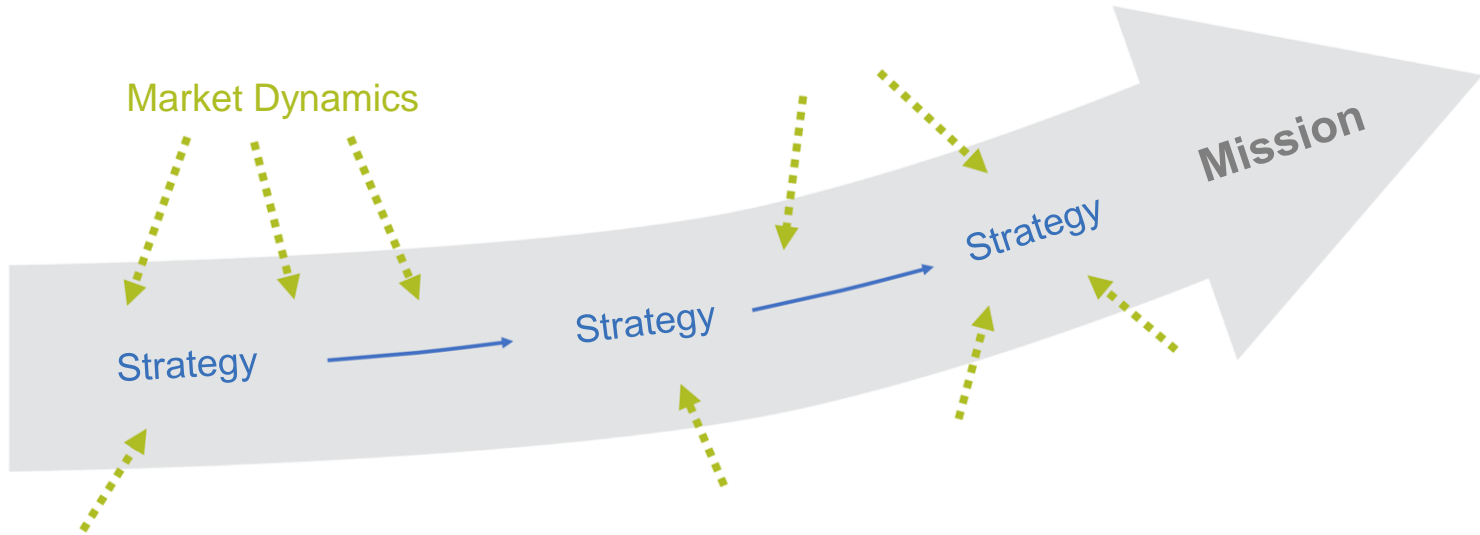
Business Agility Value Stream

Business Agility is the ability to compete and thrive in the digital age by quickly responding to market changes and emerging opportunities with innovative, digitally-enabled business solutions.

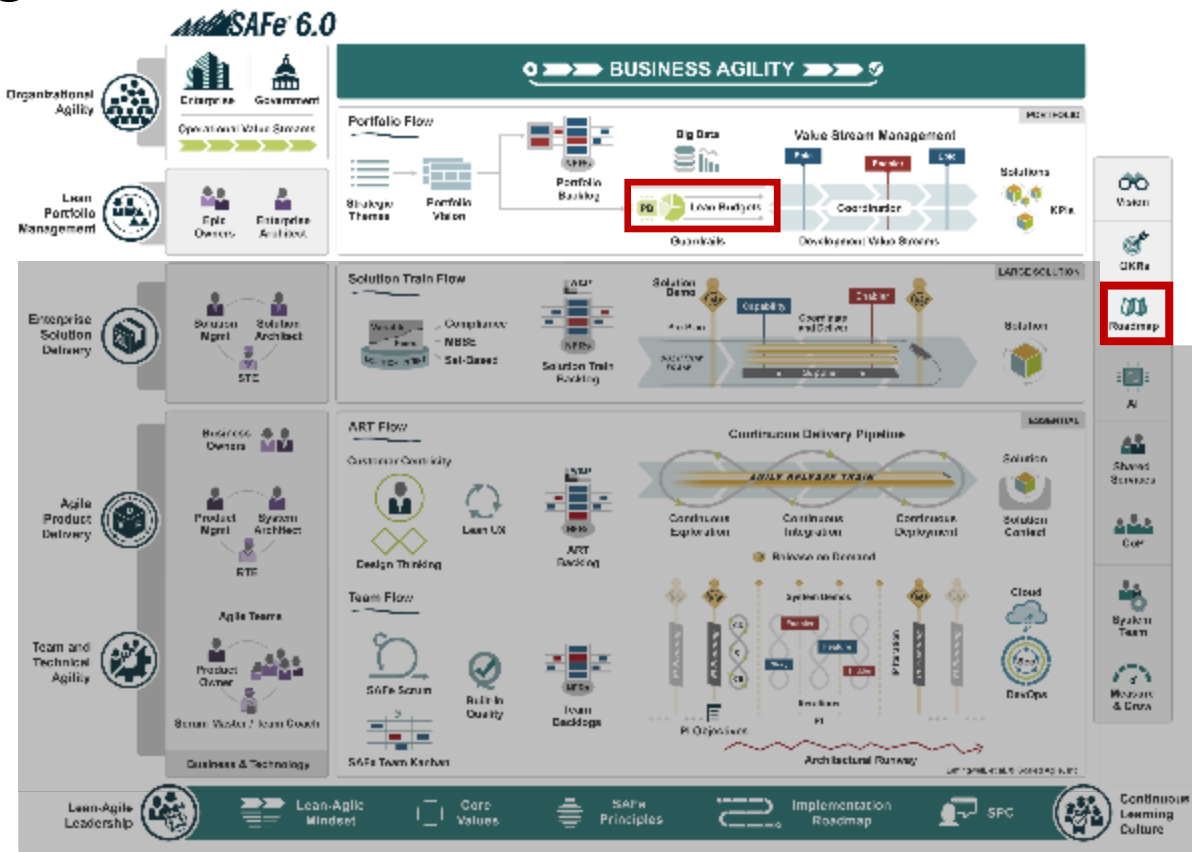


What is strategy Agility?

Strategy Agility is the ability to change and implement new strategies quickly and decisively when necessary and to persevere on the strategies that are working—or will work—if given sufficient focus and time.



SAFe portfolio elements







1900
Knowledge
doubling every
century



1945
Knowledge
doubling every
25 years

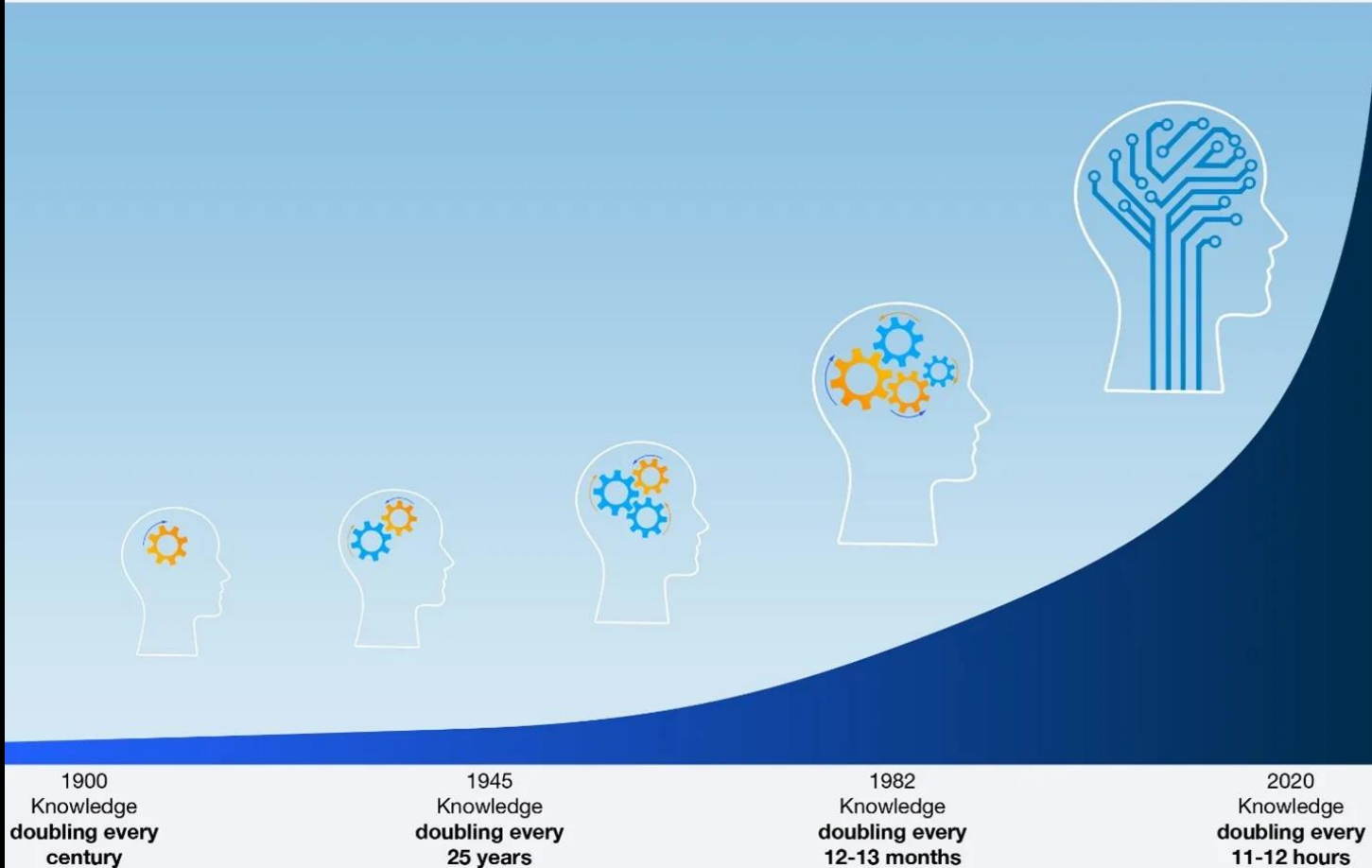


1982
Knowledge
doubling every
12-13 months

Source: Buckminster Fuller's Knowledge Doubling Curve



Knowledge Doubling Curve

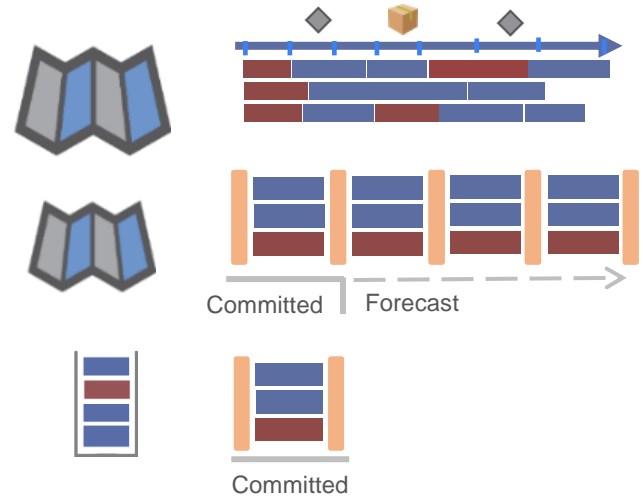
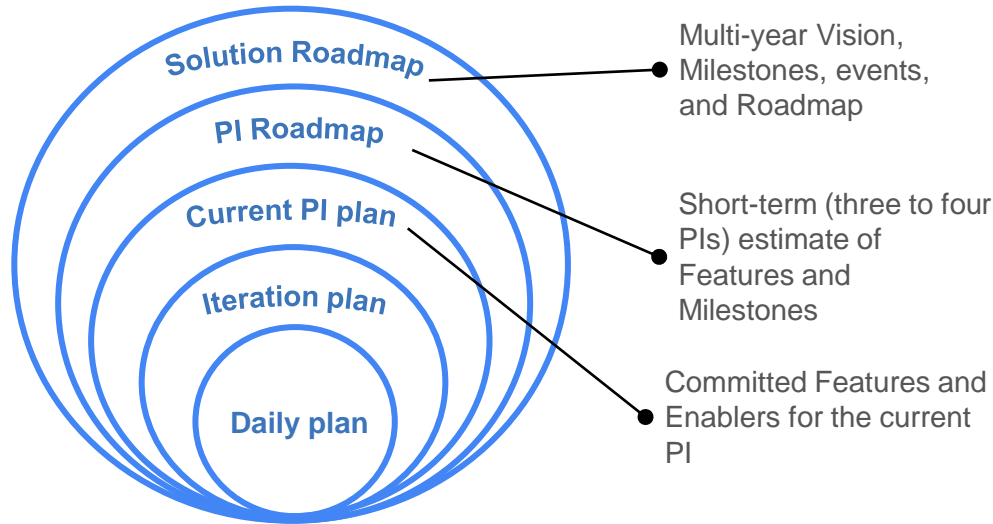


Source: Buckminster Fuller's Knowledge Doubling Curve with post 1982 addition by IBM



Apply multiple planning horizons

- Outer levels are less defined and committed
- Inner levels are more understood and detailed



Annual planning and rigid budgeting cycles vs. rolling w

Big up-front annual plan and budget



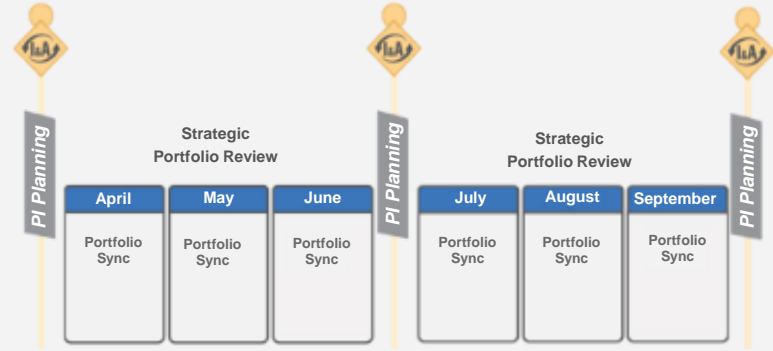
Annual planning



Annual planning and rigid budgeting cycles inhibit the ability to respond to change.

VS.

Rolling wave planning and budgeting



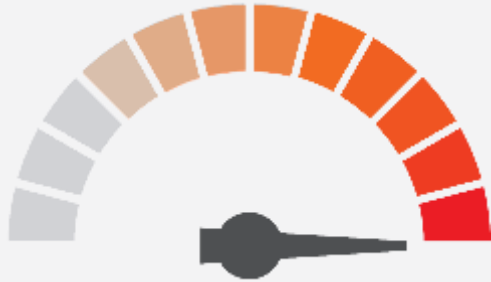
Rolling wave planning and dynamically adjusting budgets enables adapting to change.

Perpetual overload of demand vs. matching demand to

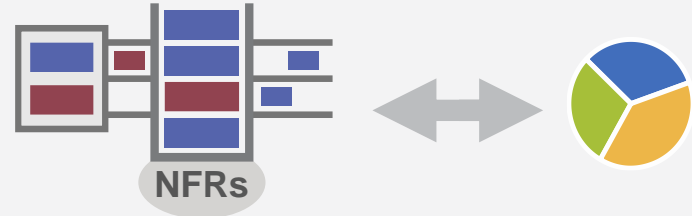
Unlimited work intake

VS.

Matching demand to capacity

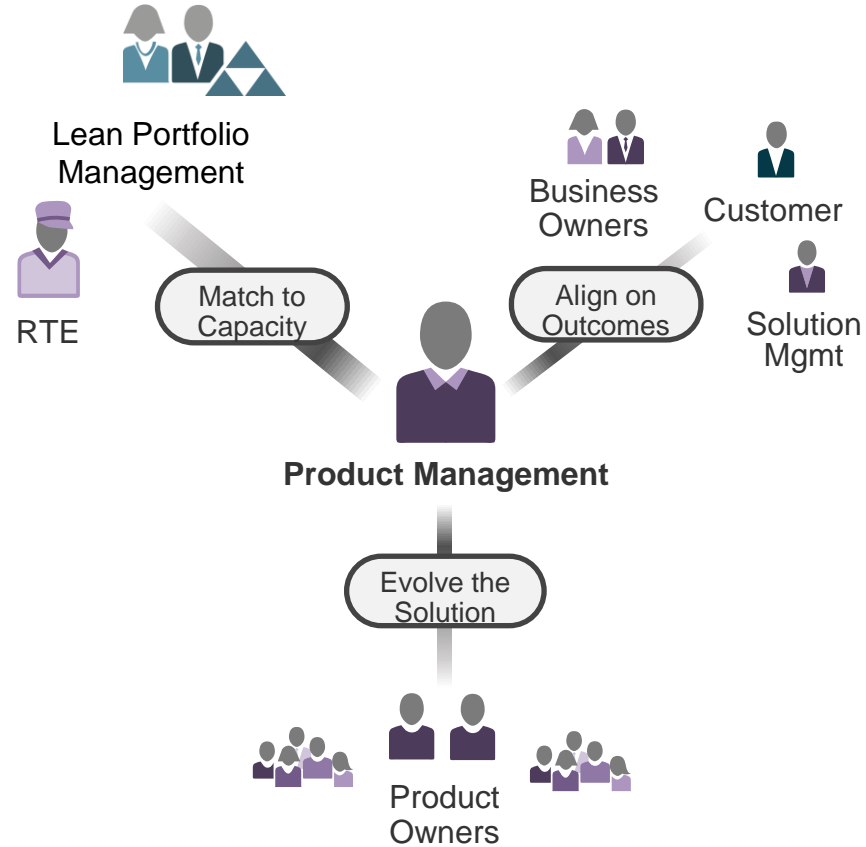


Uncontrolled management of demand and work-in-process (WIP) decreases throughput.



Matching the demand to capacity increases flow through the system.

It's a Team Effort



LPM events overview

Strategic Portfolio Review



- Focused on achieving and advancing the Portfolio Vision
- Provides continuous strategy, implementation, and budget alignment
- Typically held on a quarterly cadence, at least one month before the next PI Planning

Portfolio Sync



- Focused on portfolio operations
- Provides visibility into how well the portfolio is progressing toward meeting its objectives
- Typically held weekly, every other week, or monthly, depending on the maturity of the portfolio

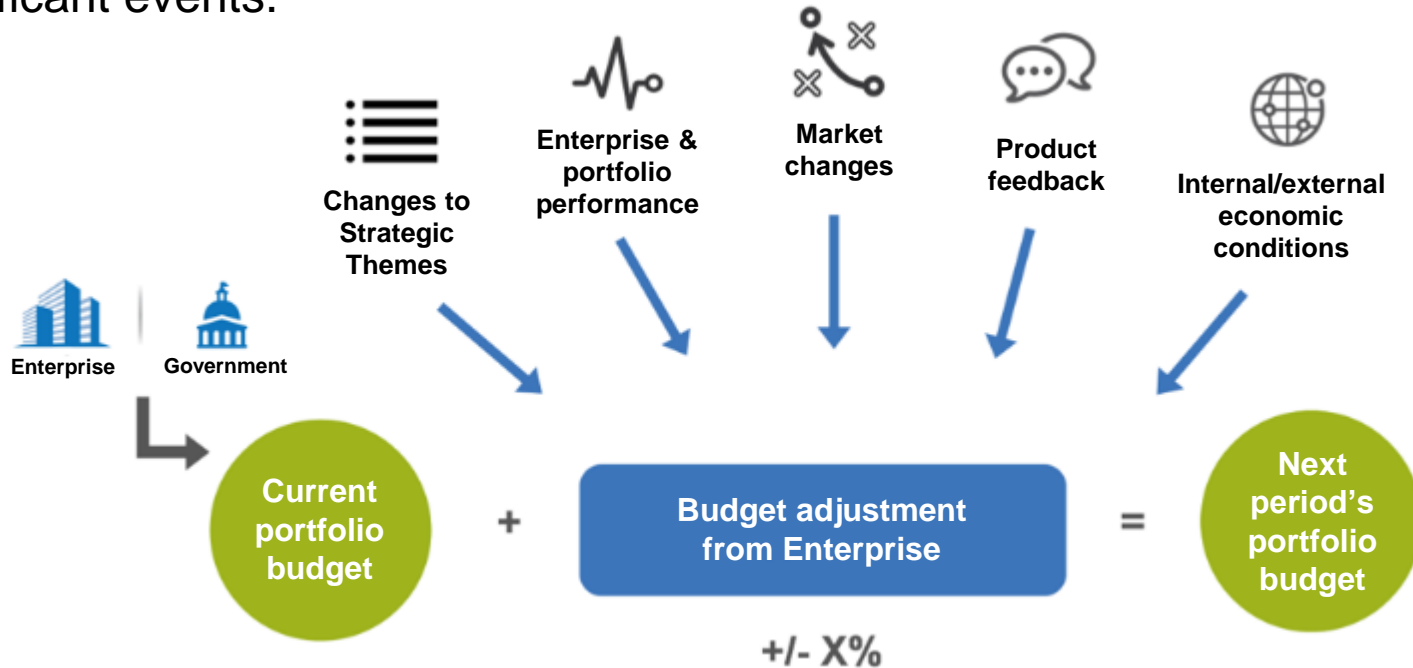
Participatory Budgeting



- Focused on establishing and adjusting Lean Budgets
- Provides a forum for stakeholders to decide how to invest the portfolio budget across Solutions and Epics
- Typically held every two PIs

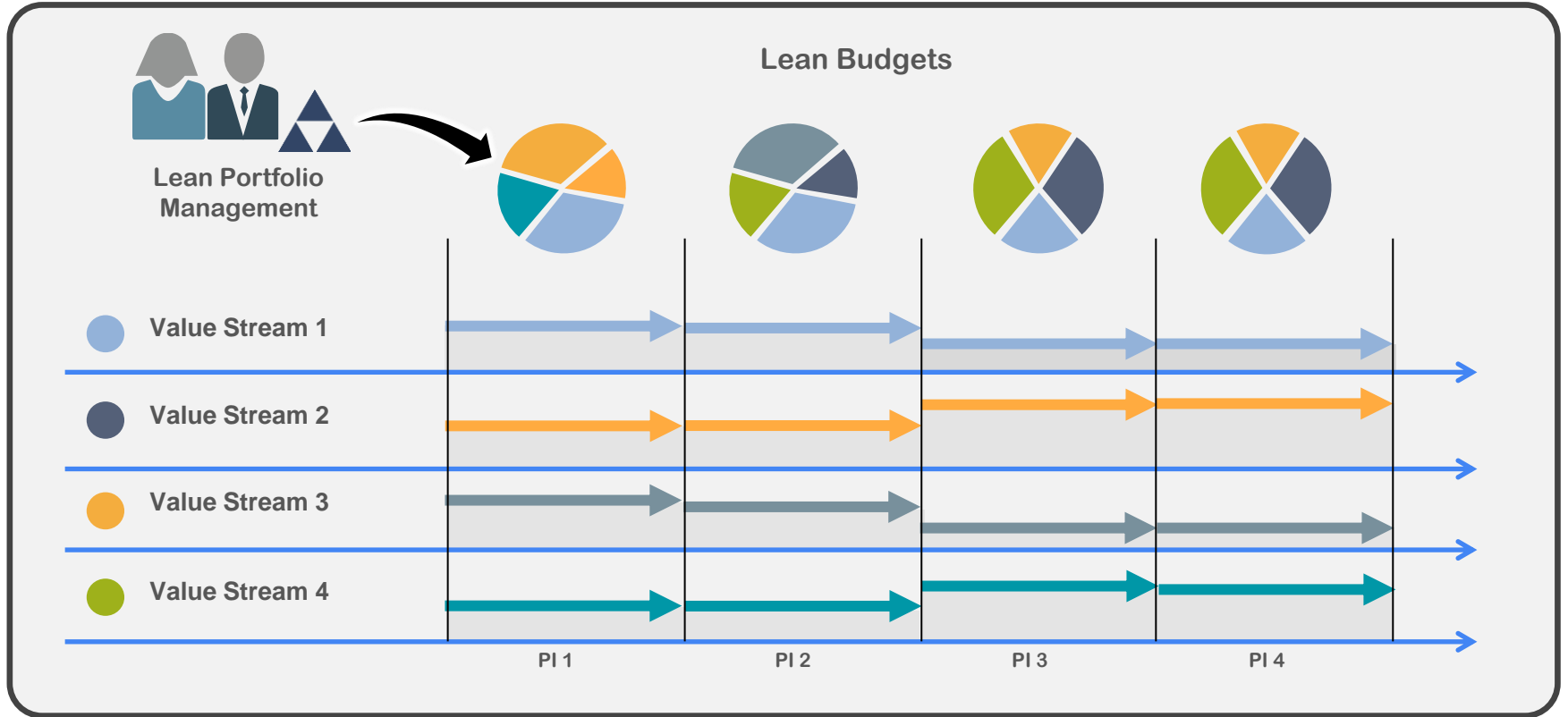
Adjust the portfolio budget allocation

Each portfolio's budget is adjusted based on the portfolio context or in response to significant events.

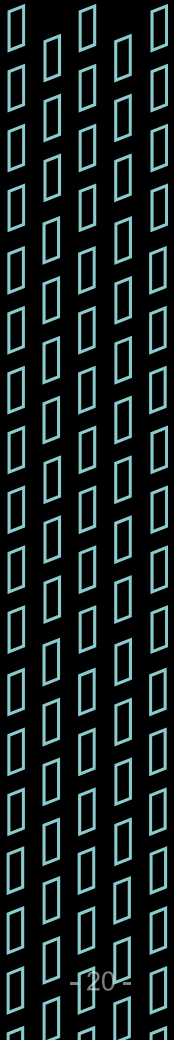


This is our budgeting starting point.

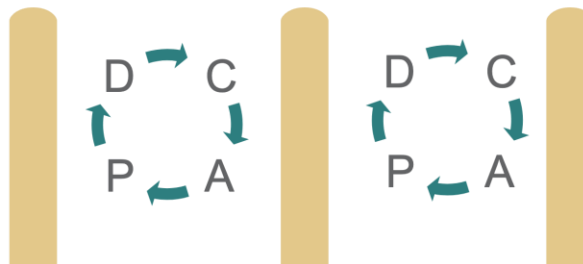
Value Stream budgets are adjusted over time



How do we know all the
impacts?



- Explore alternatives and learn faster
- Support compliance and impact analysis
- Generate documentation
- Build model quality in





Lloyd Norman

SPC, LPM, PMP, RMCP

Vice President Strategic Solutions - ProSymmetry



TempusResource
by ProSymmetry



Maximizing Strategic Flow Through Portfolio Capacity Planning



Portfolio Capacity Planning Used Worldwide

Technology



CPG / Manufacturing



Insurance



Healthcare



Energy, Utility, Defense/Space



Misc



Agency



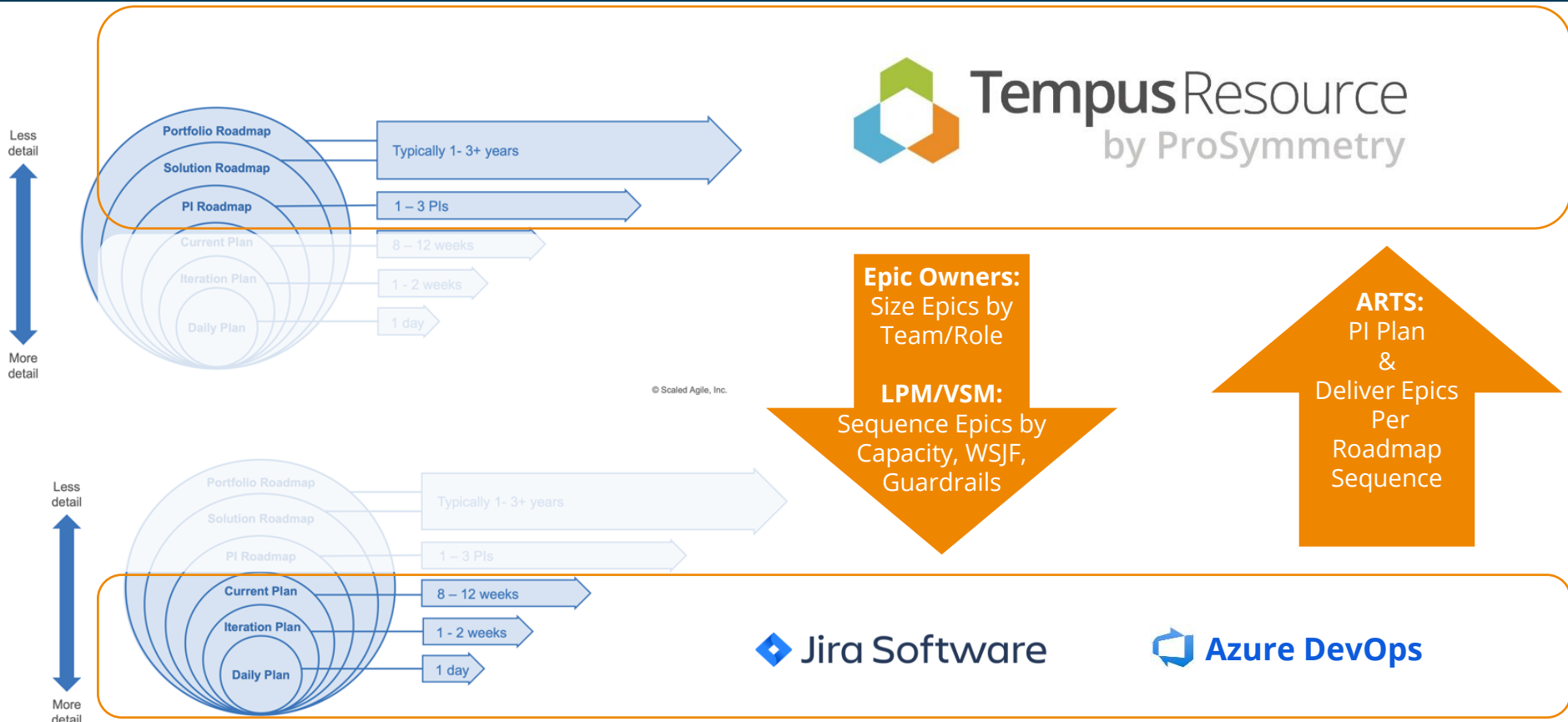
Prof Serv



Financial



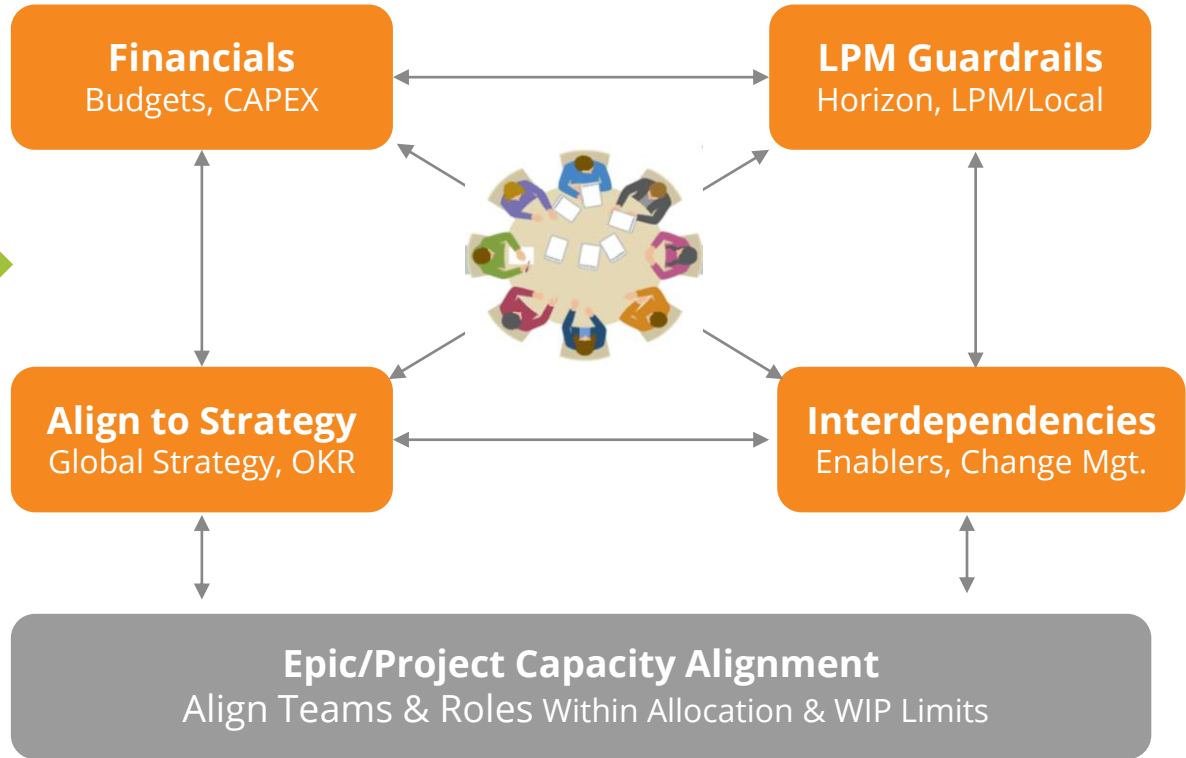
LPM Transparently Realigns Required Epic Capacity to Changing Priorities



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Analyze Interrelated Portfolio Impacts Before Sequencing Epics



DEMO: Size & Align Epics/Projects for Flow Before Sequencing Roadmap



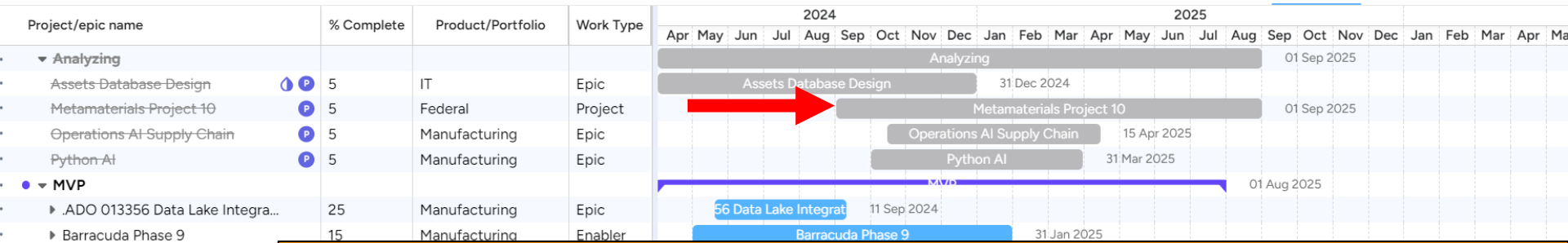
TempusTM
Resource

Interactively Realign Epics, Projects, KTLO Work, Talent, & Financials - Without Impacting Production Data

← .SAFe Flow Webinar from 01 Apr 2024 to 01 Apr 2027

Group by: Insert columns: Filters: 3 Years

Gantt Grid Financials

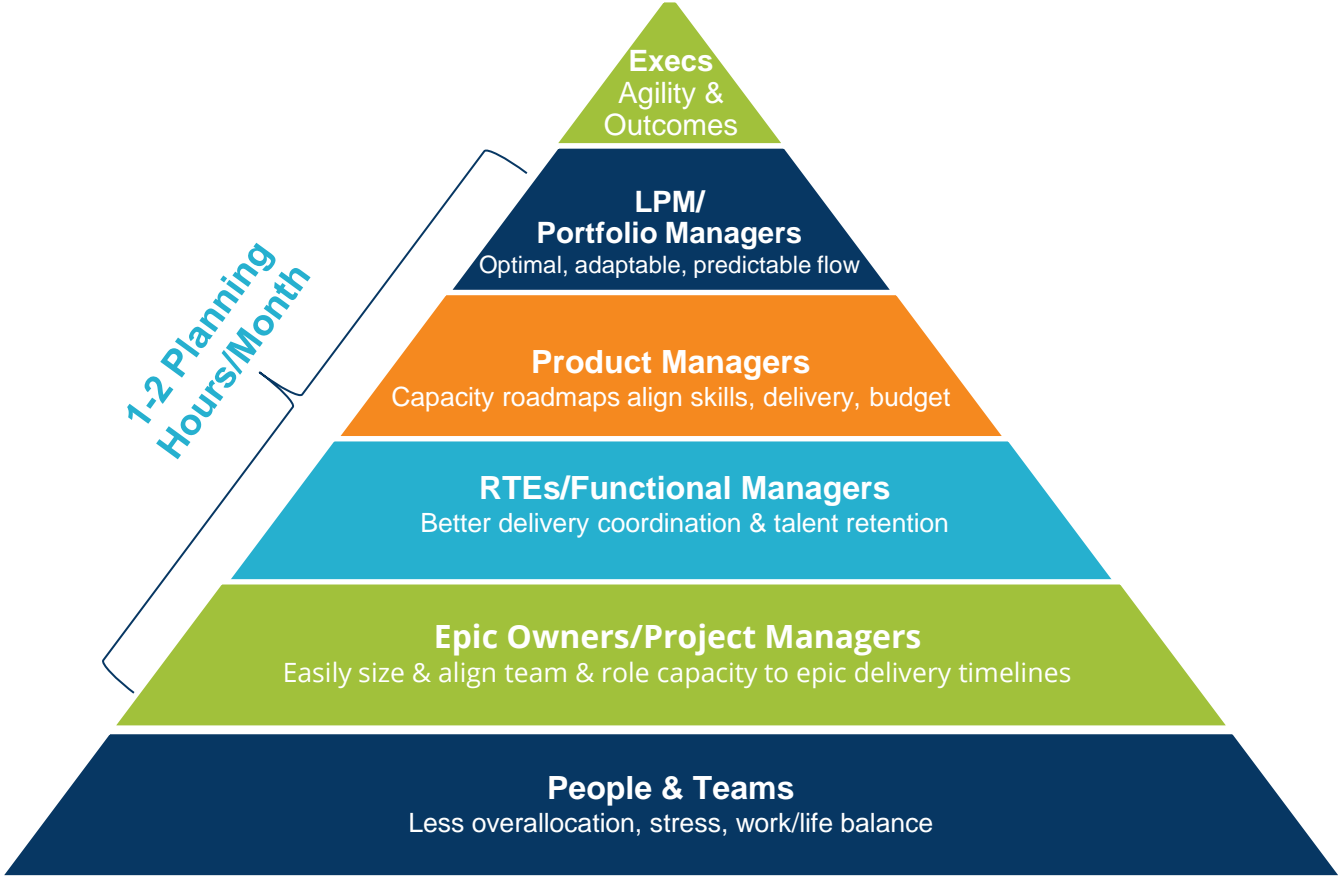


Model How to Best Align Capacity of Teams & People, Budgets, & CAPEX to Strategy in Real Time

Filters: Points/Hours: Month: Grid Graph Heat map Cool map Delta

Resource	Apr 24	May 24	Jun 24	Jul 24	Aug 24	Sep 24	Oct 24	Nov 24	Dec 24
▼ Manufacturing ART	97 %	90 %	124 %	123 %	129 %	134 %	111 %	118 %	
▶ MFG ART Assembly Team	120 %	110 %	110 %	110 %	70 %	70 %	70 %	70 %	
▶ MFG ART Inventory Team	90 %	124 %	131 %	130 %	142 %	142 %	137 %	109 %	
▶ MFG ART Shipping Team	105 %	30 %	80 %	80 %	122 %	165 %	148 %	175 %	
▶ MFG ART Validation Team	62 %	138 %	202 %	199 %	202 %	160 %	85 %	94 %	
▼ Manufacturing Epic Owners	70 %	85 %	81 %	65 %	57 %	54 %	55 %	42 %	
▶ Epic Owner Architecture MFG	59 %	90 %	88 %	91 %	90 %	87 %	92 %	51 %	

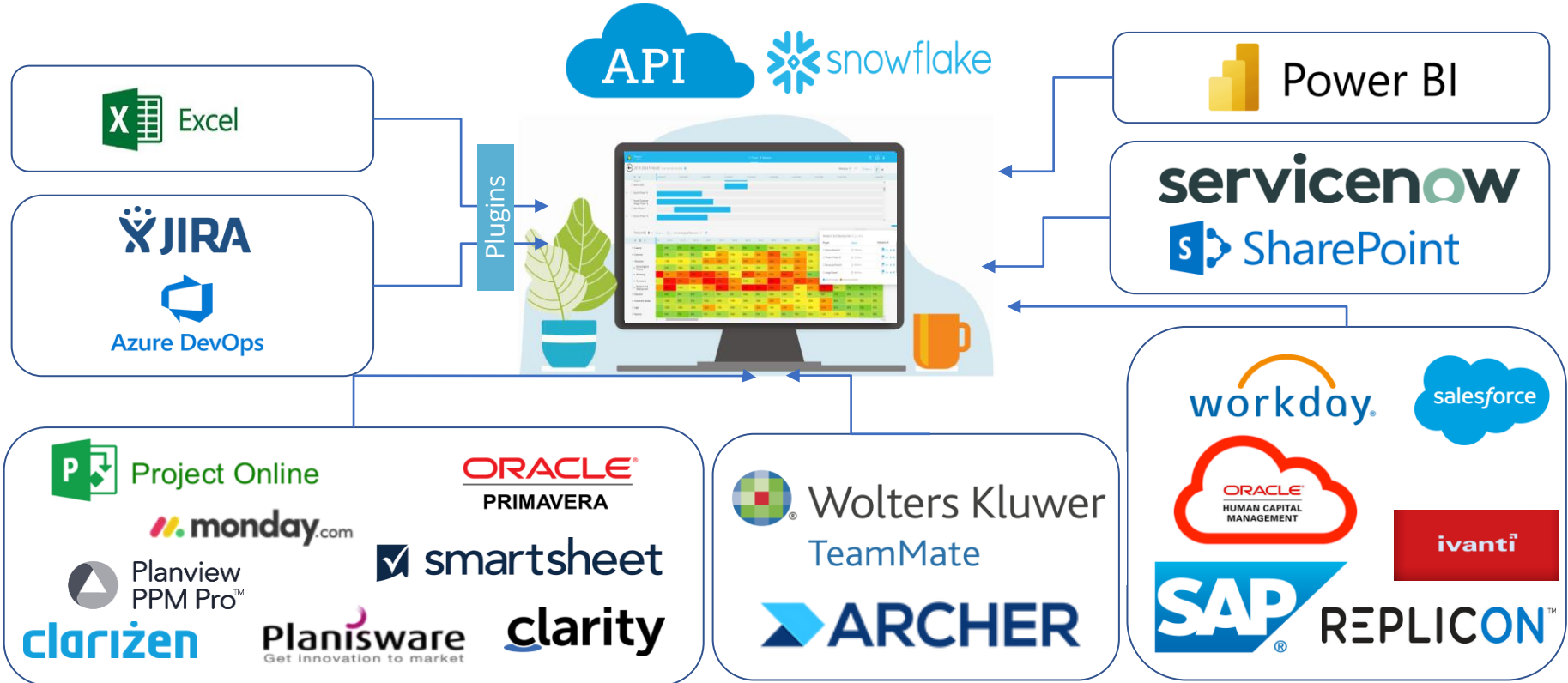
Efficient Capacity Planning Benefits The Enterprise



Integrations Can Enhance Adoption & Execution



Unify Data from Various Source Systems



Recognized in the 2023
Gartner® Magic Quadrant™
for Adaptive Project
Management and Reporting

Recognized in the 2023
Gartner® Critical Capabilities
for Adaptive Project
Management & Reporting



Questions?

To continue the conversation,
Or for a free trial,
reach out to us at:

gbailey@prosymmetry.com



“Portfolio work can’t go anywhere unless there are people to do it.”

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