

SAFe® Product Owner/ Product Manager

Delivering Value through
Effective PI Execution

6.0.1

Workbook



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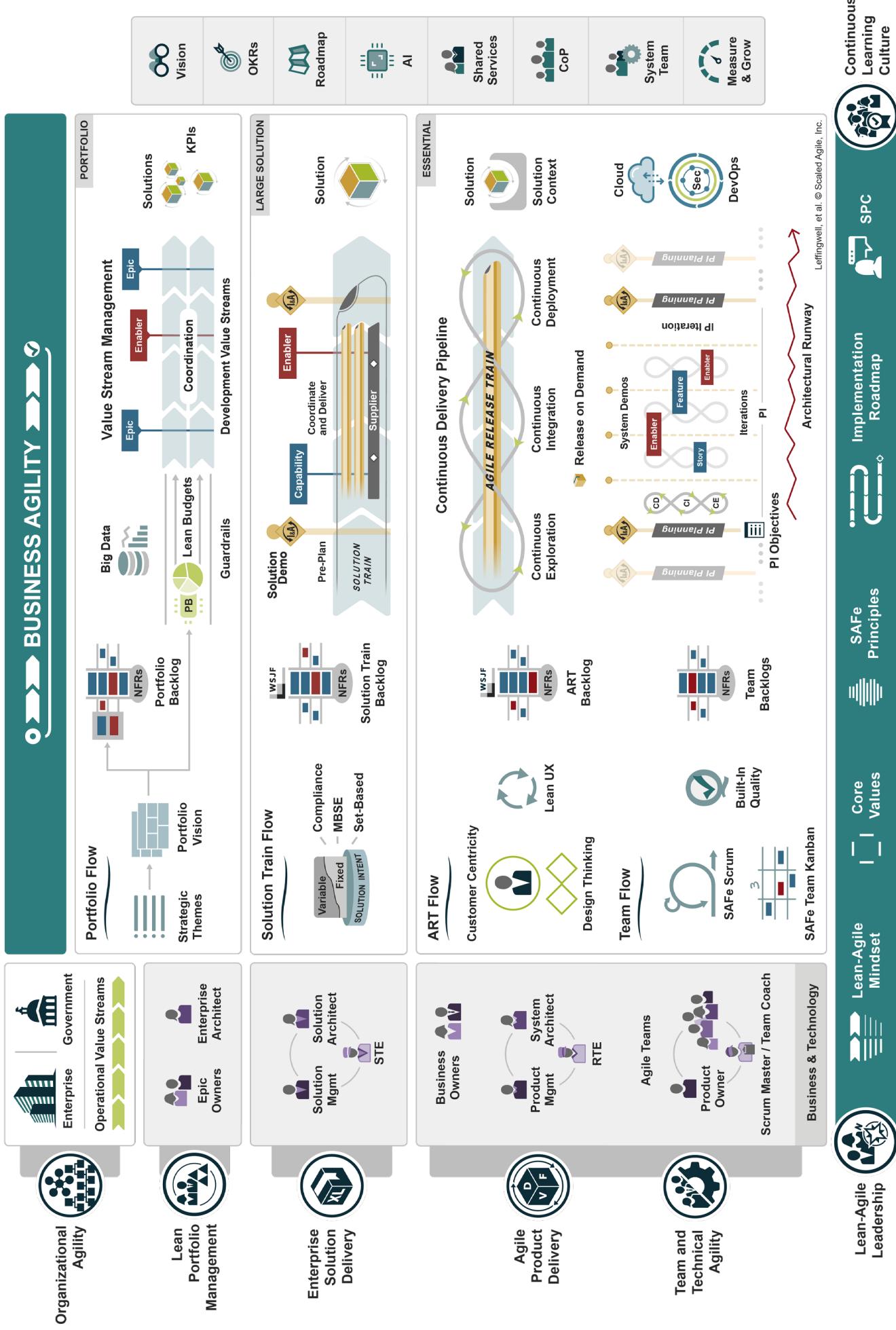
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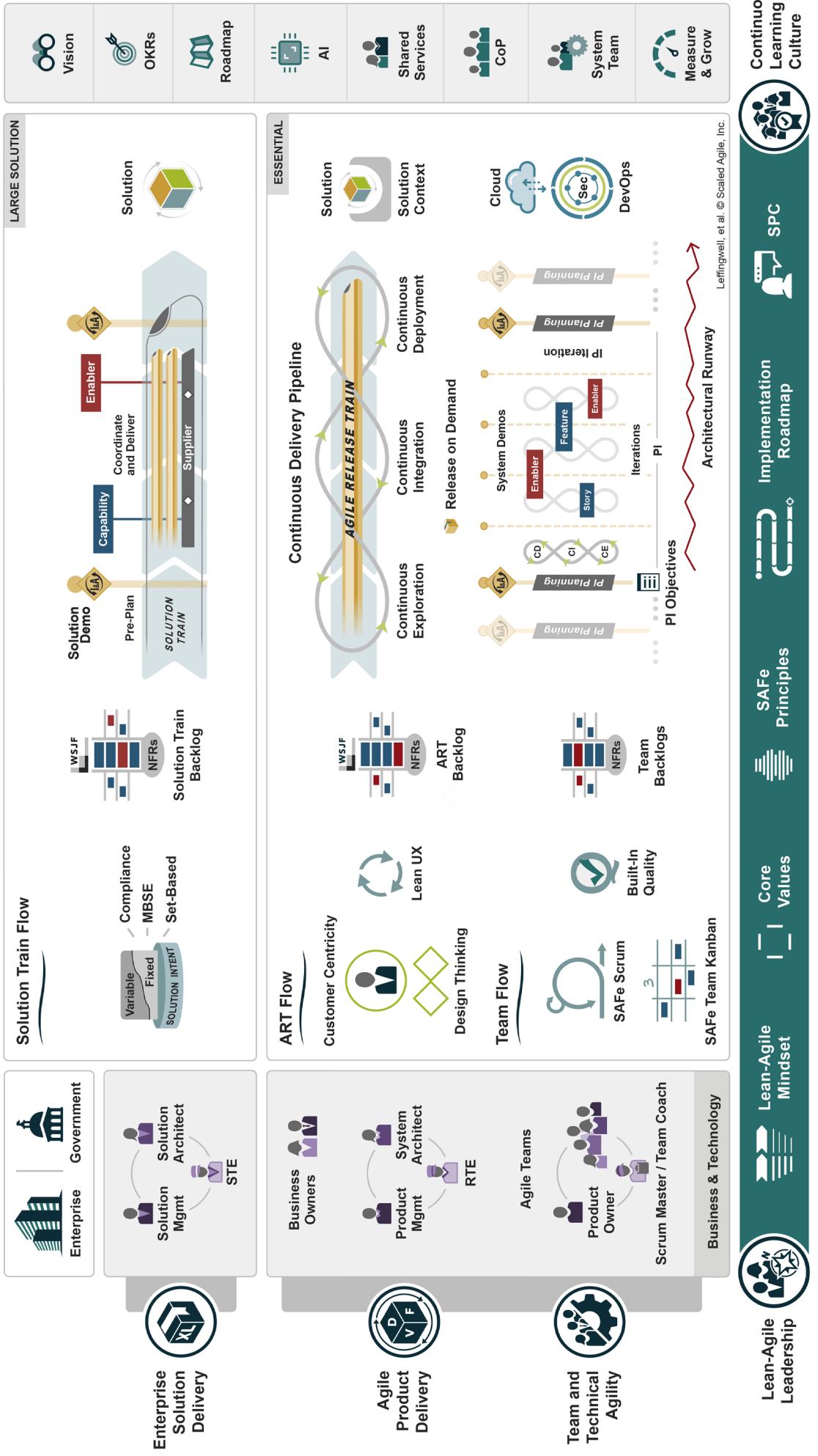


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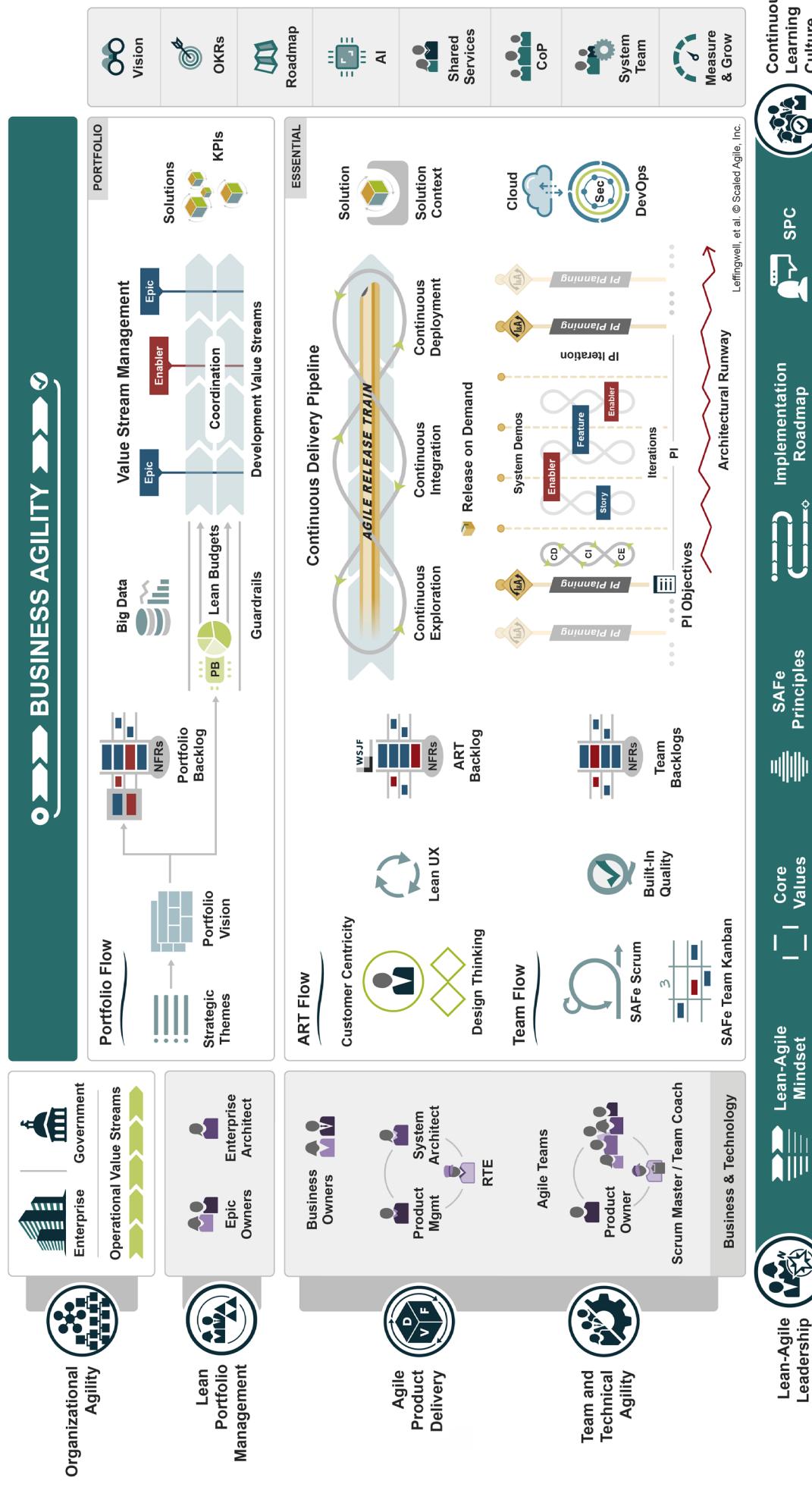
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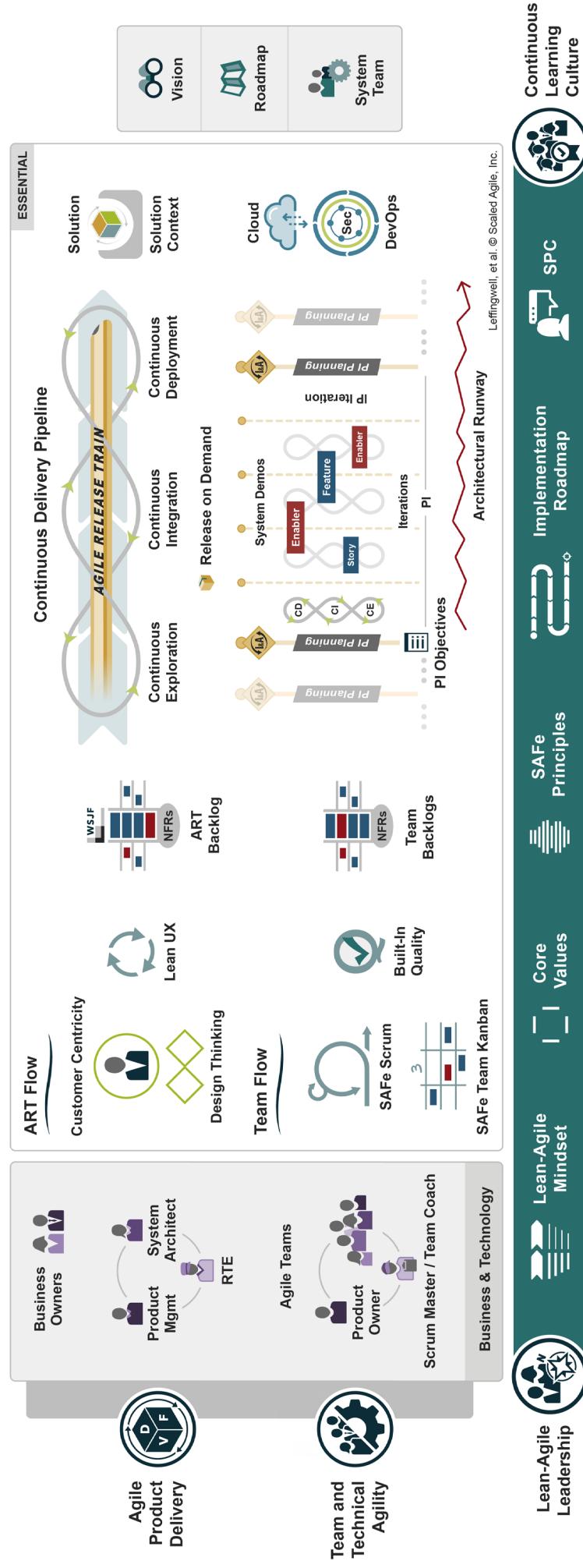


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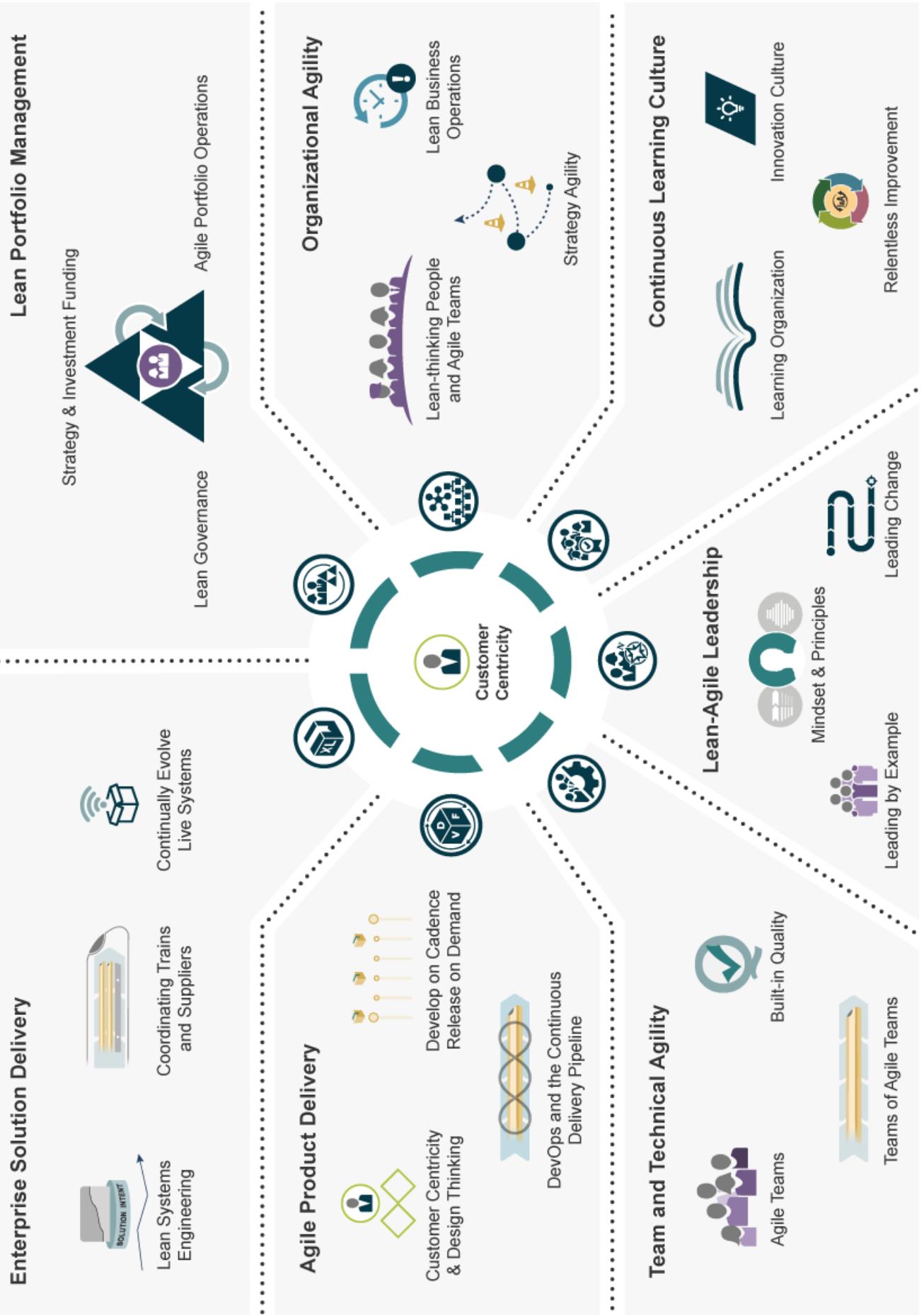
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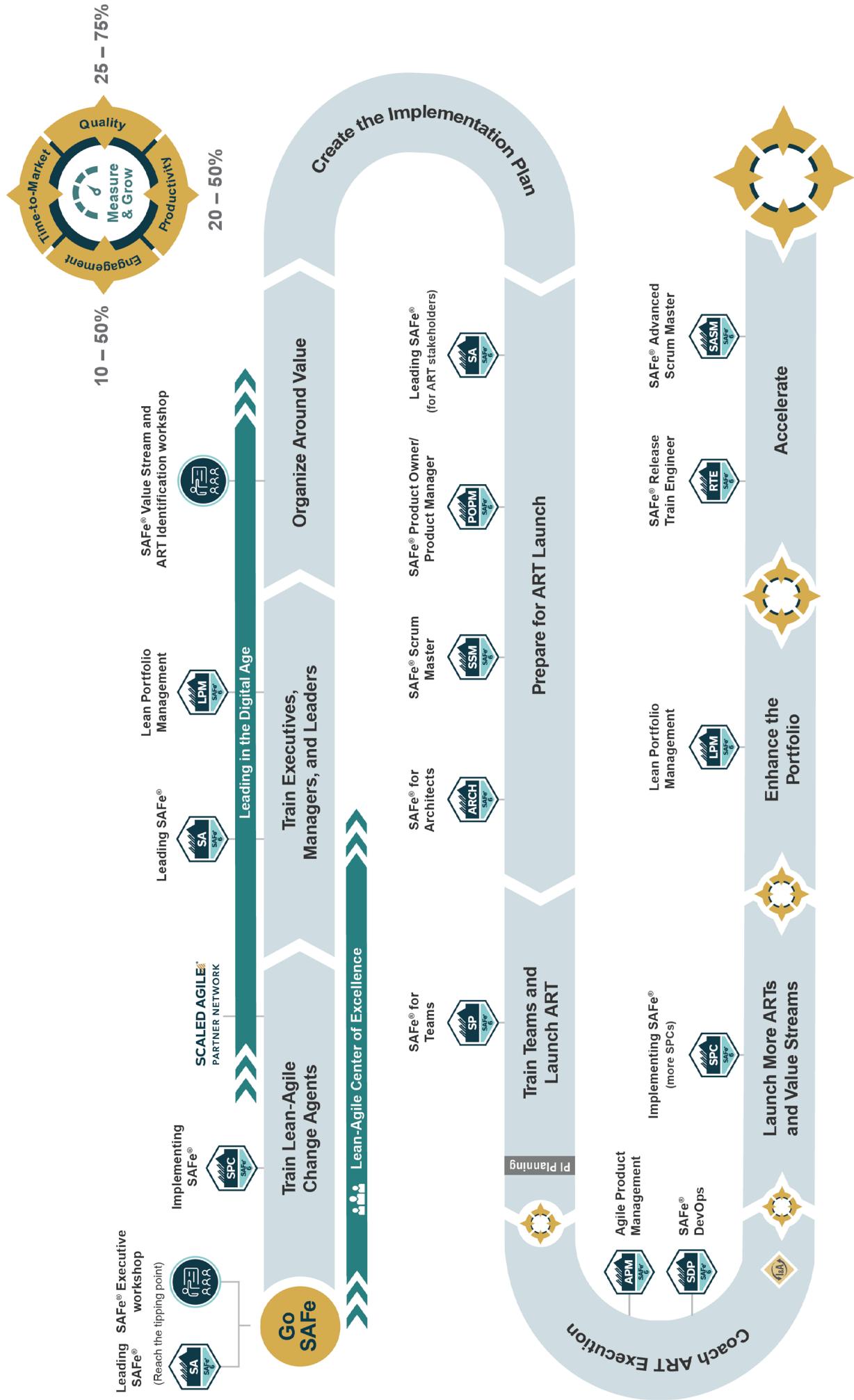


BUSINESS AGILITY



SAFe® Implementation Roadmap

Business results



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SAFe® Product Owner / Product Manager

Delivering value through effective PI execution

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Logistics

- ▶ Course meeting times
- ▶ Breaks
- ▶ Facilities
- ▶ Technology requirements
- ▶ Working agreements



Activity: Access the Class Page

Duration
5 min

- ▶ **Step 1:** Navigate to the Class Page in SAFe Studio
- ▶ **Step 2:** Select Learn, then My Classes, then Product Owner / Product Manager (6.0)
- ▶ **Step 3:** Click on the link to Download the Product Owner / Product Manager (6.0) Workbook (PDF)



Visit the Product Owner / Product Manager Class Page to download the workbook
<https://bit.ly/Studio-MyClasses>

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Course outline

- ▶ Lesson 1: Exploring Product Owner and Product Management Roles and Responsibilities
- ▶ Lesson 2: Preparing for PI Planning
- ▶ Lesson 3: Leading PI Planning
- ▶ Lesson 4: Executing Iterations
- ▶ Lesson 5: Executing the PI
- ▶ Lesson 6: Practicing SAFe

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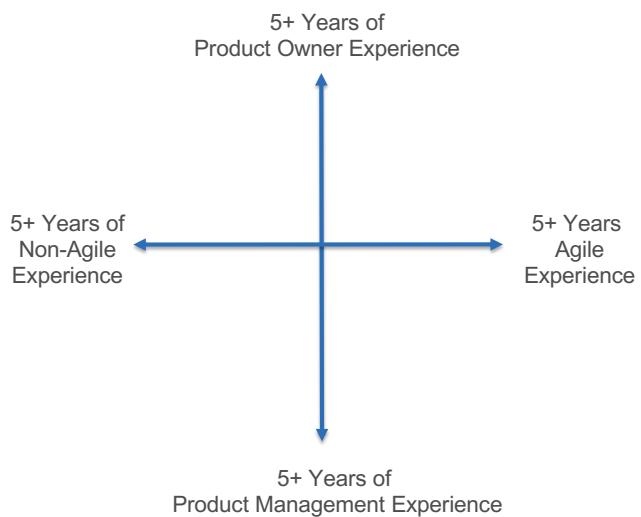
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Activity: Product Owner and Product Management experience

Duration
5 min

- ▶ **Step 1:** Introduce yourself to your group
- ▶ **Step 2:** Individually, identify and mark your experience level on the POPM and Agile matrix in terms of:
 - Experience as a Product Owner or Product Manager
 - Experience with Agile, including SAFe certifications and courses



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Lesson 1

Exploring Product Owner and Product Management Roles and Responsibilities

SAFe® Course - Attending this course gives learners access to the SAFe Product Owner / Product Manager exam and related preparation materials.



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Lesson Topics

1.1 Introducing SAFe for Product Owners and Product Management

1.2 The Lean-Agile Mindset

1.3 Value Streams

1.4 Responsibilities of Product Owners and Product Management



Learning objectives

At the end of this lesson, you should be able to:

- ▶ Define SAFe as it relates to Product Owners and Product Management
- ▶ Summarize the Lean-Agile Mindset for decision-making
- ▶ Explain Value Streams and their benefit
- ▶ Summarize the responsibilities of Product Owners and Product Management



Video: TTC History and Business Context



<https://bit.ly/Video-TTCIntro>

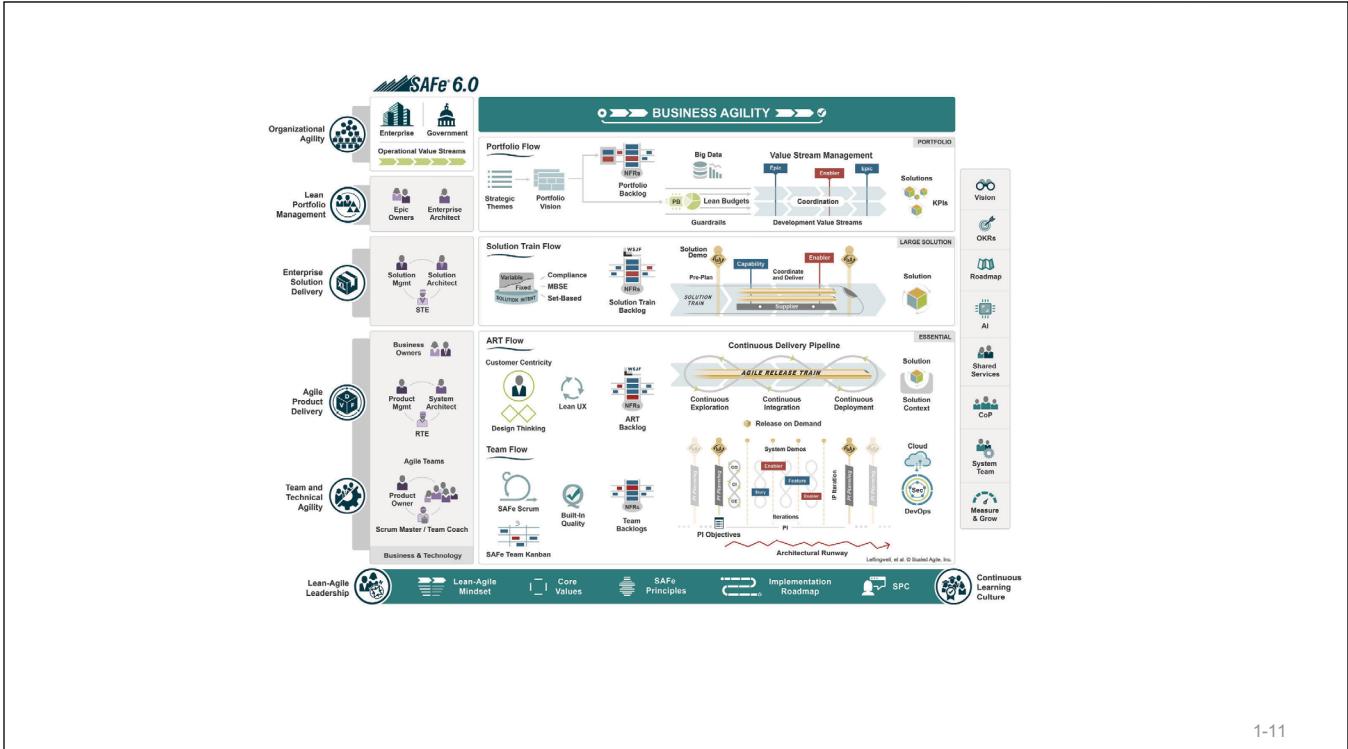
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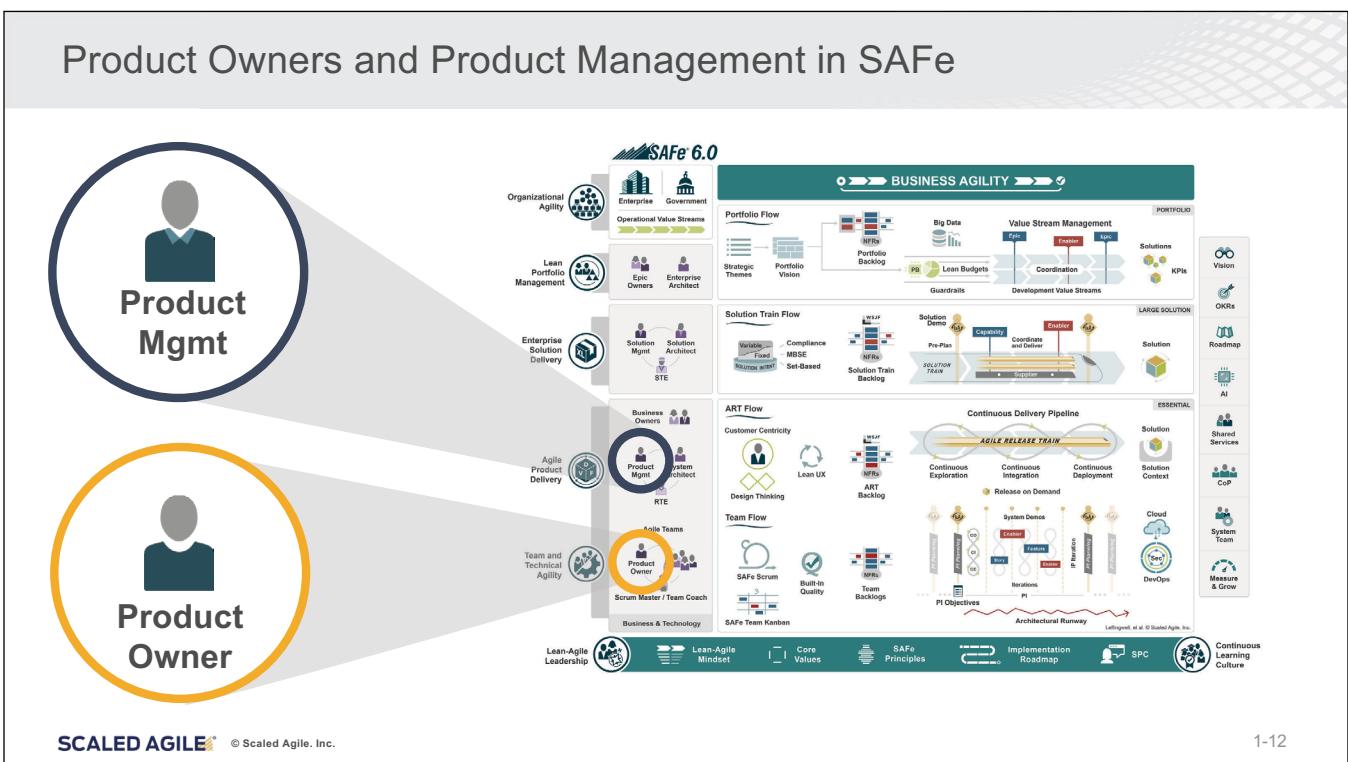
1.1 Introducing SAFe for Product Owners and Product Management

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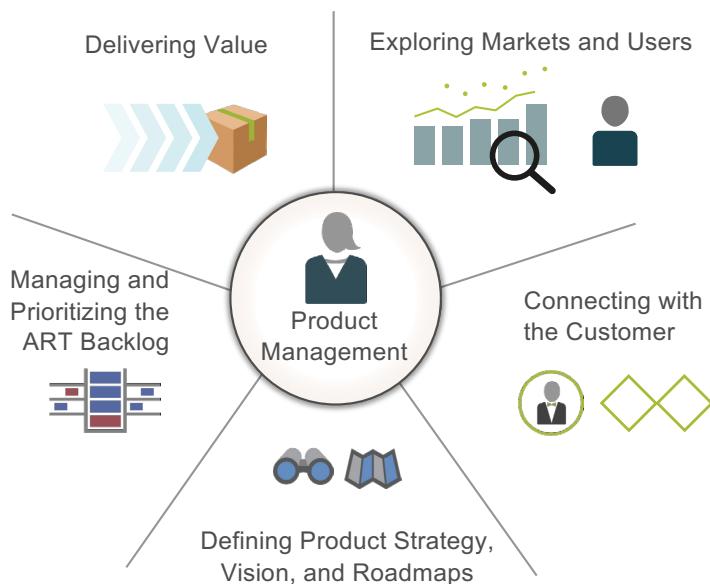
Product Owner (PO) areas of responsibility



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Product Management areas of responsibility



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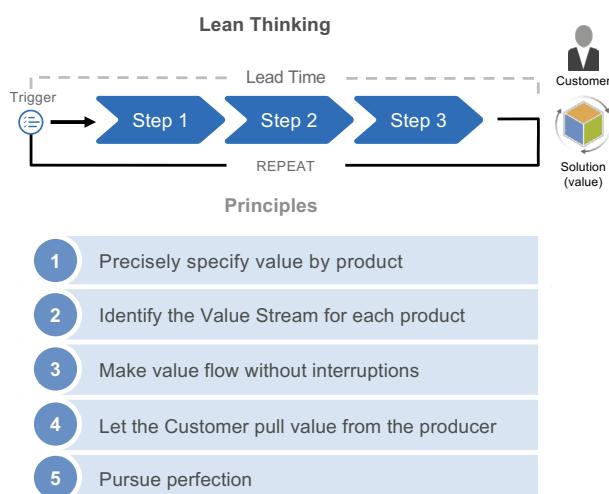
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1.2 The Lean-Agile Mindset

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Embrace the Lean-Agile Mindset



Agile Values

We are uncovering better ways of developing software by doing it and helping others do it.

Through this work we have come to value:

- Individuals and interactions over processes and tools
- Working software over comprehensive documentation
- Customer collaboration over contract negotiation
- Responding to change over following a plan

That is, while there is value in the items on the right,
we value the items on the left more.

Reference: Agile Manifesto

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The Agile Manifesto principles

1. Our highest priority is to satisfy the customer through early and continuous delivery of valuable software.
2. Welcome changing requirements, even late in development. Agile processes harness change for the customer's competitive advantage.
3. Deliver working software frequently, from a couple of weeks to a couple of months, with a preference for the shorter timescale.
4. Business people and developers must work together daily throughout the project.

The Agile Manifesto principles

5. Build projects around motivated individuals. Give them the environment and support they need and trust them to get the job done.
6. The most efficient and effective method of conveying information to and within a development team is face-to-face conversation.
7. Working software is the primary measure of progress.
8. Agile processes promote sustainable development. The sponsors, developers, and users should be able to maintain a constant pace indefinitely.

The Agile Manifesto principles

9. Continuous attention to technical excellence and good design enhances agility.
10. Simplicity—the art of maximizing the amount of work not done—is essential.
11. The best architectures, requirements, and designs emerge from self-organizing teams.
12. At regular intervals, the team reflects on how to become more effective, then tunes and adjusts its behavior accordingly.

SAFe Lean-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 Make value flow without interruptions
- #7 Apply cadence, synchronize with cross-domain planning
- #8 Unlock the intrinsic motivation of knowledge workers
- #9 Decentralize decision-making
- #10 Organize around value



Discussion: Applying a Lean-Agile Mindset



- ▶ **Step 1:** Think about the SAFe Lean-Agile Principles
- ▶ **Step 2:** Discuss how the SAFe Lean-Agile Principles might impact your decision-making as a Product Owner or Product Manager

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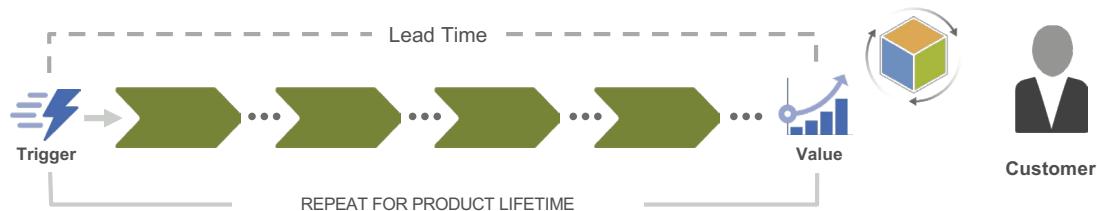
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1.3 Value Streams

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What is a Value Stream?



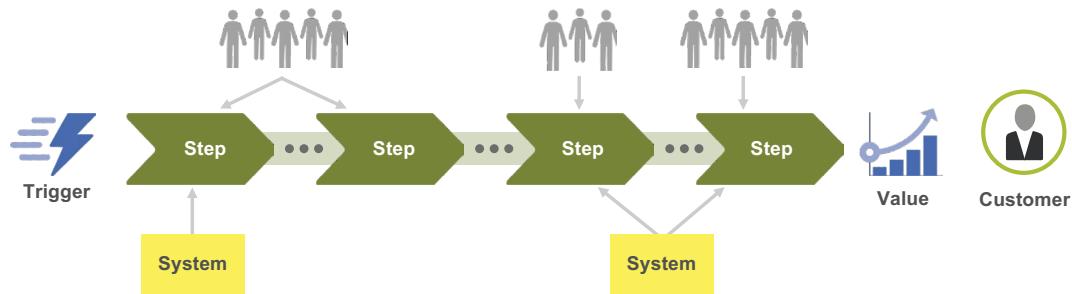
- ▶ Represents the series of steps an organization uses to deliver a product or service to a Customer
- ▶ Persists for as long as Customers continue to derive value
- ▶ Contains the systems, the people who do the work, and the flow of information and materials

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Operational Value Streams

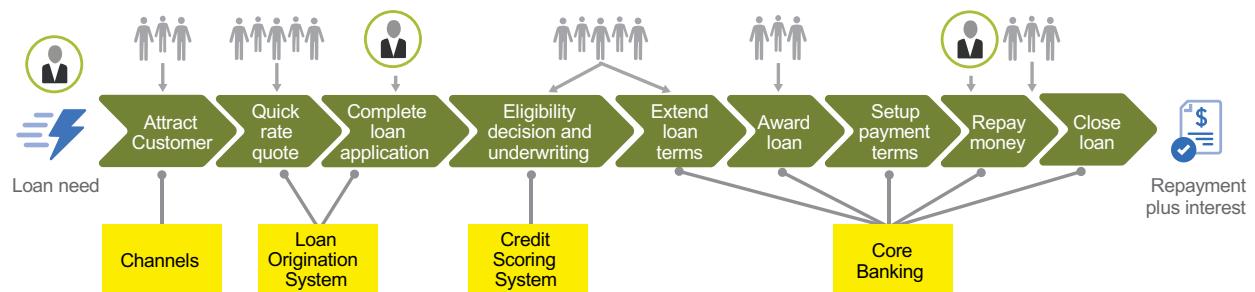
- ▶ The sequence of activities needed to deliver a product or service to a Customer
- ▶ Examples: manufacturing a product, fulfilling an e-commerce order, admitting and treating a patient, providing a loan, or delivering a professional service



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Consumer loan Operational Value Stream example

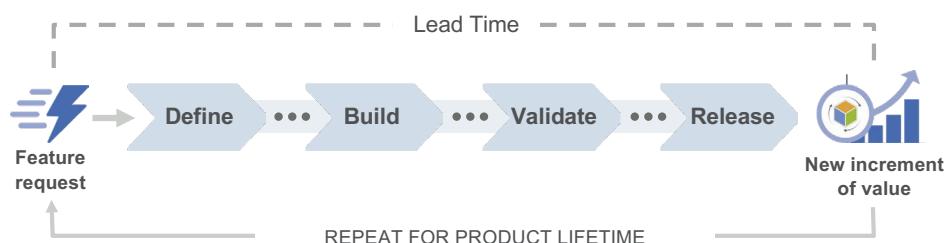


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Development Value Streams

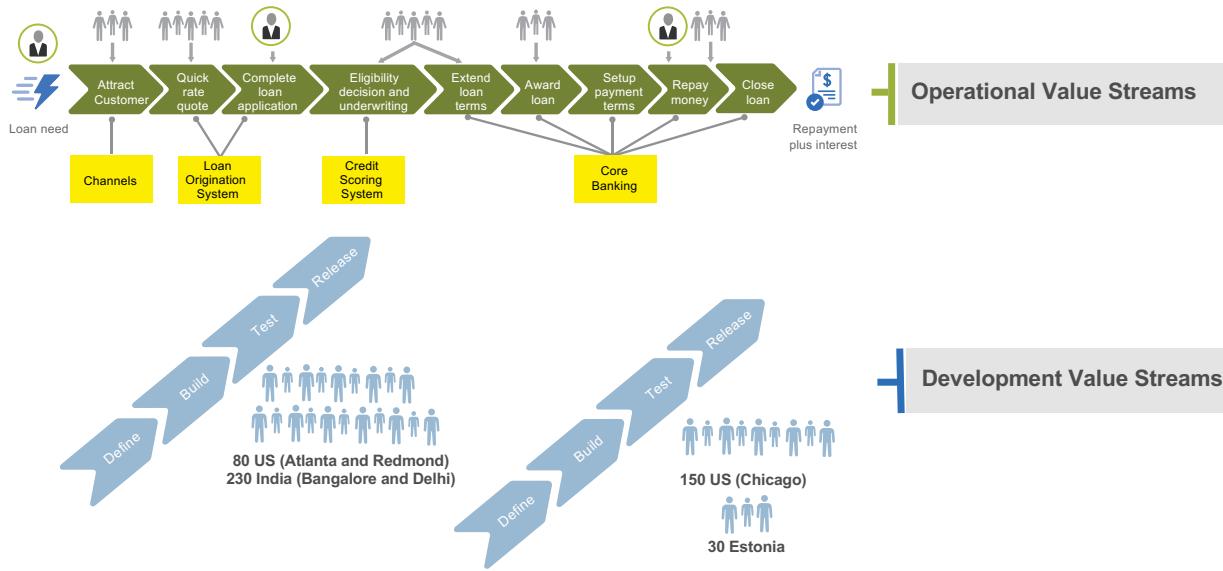
- The sequence of activities needed to convert a business hypothesis into a technology-enabled product or service that delivers Customer value
- Examples: designing and developing a medical device, developing and deploying a Customer Relationship Management (CRM) system, or building an e-commerce web site



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Development Value Streams support Operational Value Streams

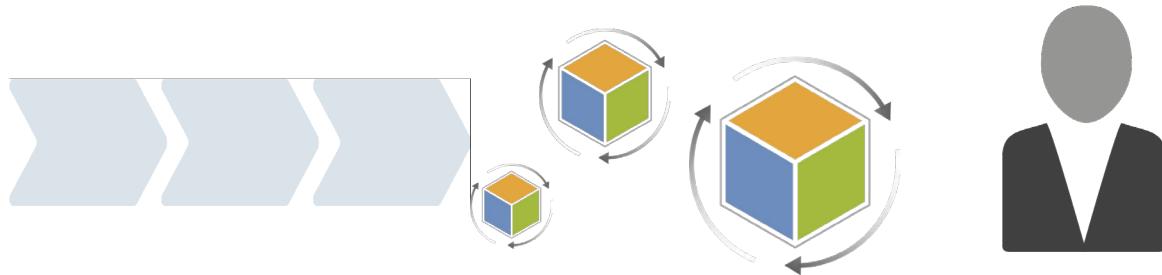


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What is a Solution?

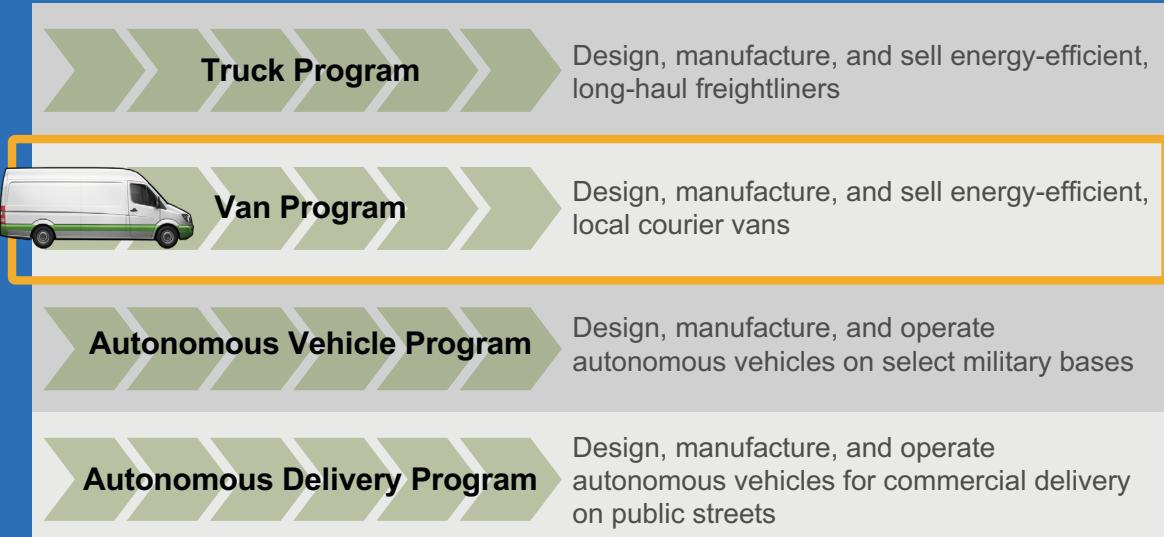
- ▶ A Solution is a product, service, or system delivered to the Customer, whether internal or external to the Enterprise
- ▶ Each Development Value Stream produces one or more Solutions that enable the Operational Value Stream



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Operational Value Streams for TTC

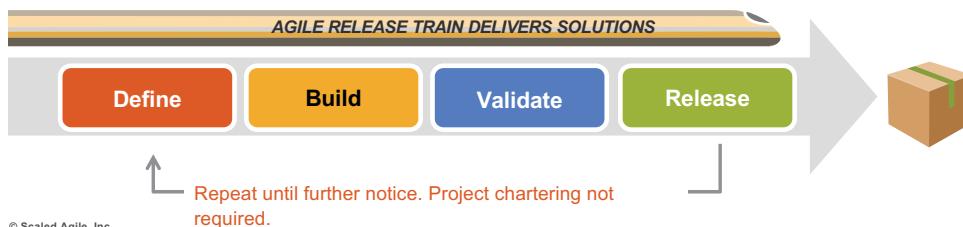


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What is an Agile Release Train (ART)?

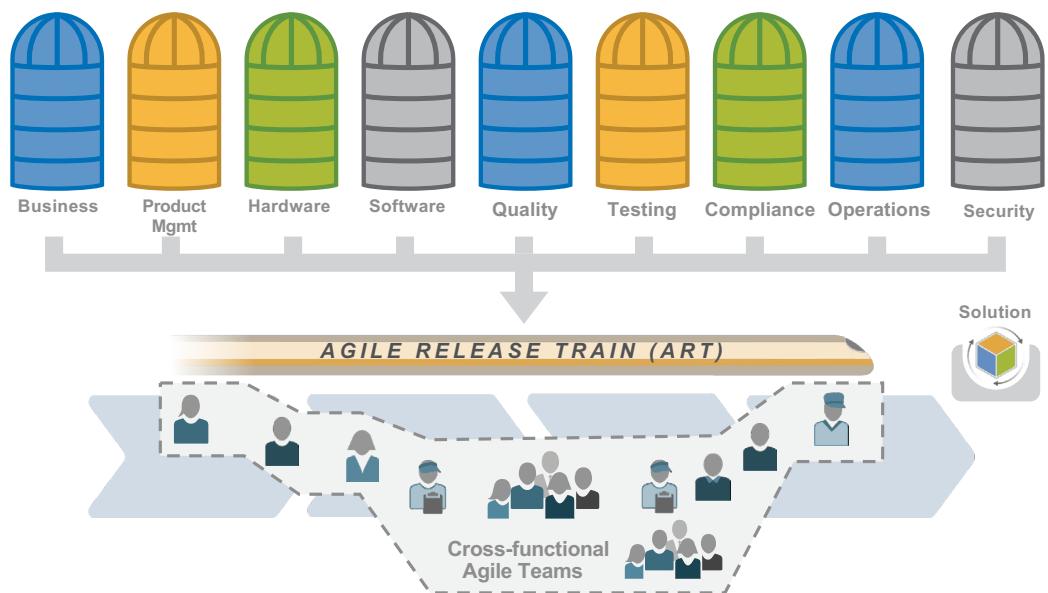
- ▶ Consists of a virtual organization of 5 to 12 teams (50 to 125 individuals)
- ▶ Has all the capabilities—software, hardware, firmware, and other assets—needed to define, implement, test, and deploy new system functionality
- ▶ Operates with the goal of achieving continuous flow of value
- ▶ Synchronizes on common cadence
- ▶ Aligns to a common mission through the ART Backlog



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An ART is fully cross-functional



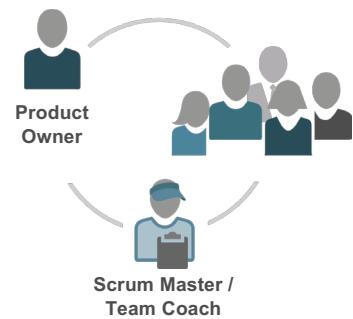
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What is an Agile Team?

- ▶ A cross-functional, self-organizing team of 10 or fewer people that defines, builds, tests, and delivers Solution functionality
- ▶ Uses SAFe Scrum or SAFe Team Kanban for Team Agility
- ▶ Applies Built-in Quality practices for Technical Agility
- ▶ Delivers value every Iteration
- ▶ Functions as the basic building block of the SAFe Enterprise

Agile Team



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Areas of responsibility of the Agile Team



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Agile Teams have two specialty roles



Scrum Master / Team Coach (SM/TC)

- Facilitates PI Planning
- Supports Iteration execution
- Improves flow
- Builds high-performing teams
- Improves ART performance



Product Owner (PO)

- Connects with the Customer
- Contributes to the Vision and Roadmap
- Manages and prioritizes the Team Backlog
- Supports the team in delivering value
- Gets and applies feedback

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1.4 Responsibilities of Product Owners and Product Management

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Product Management, PO, and Agile Team partnership

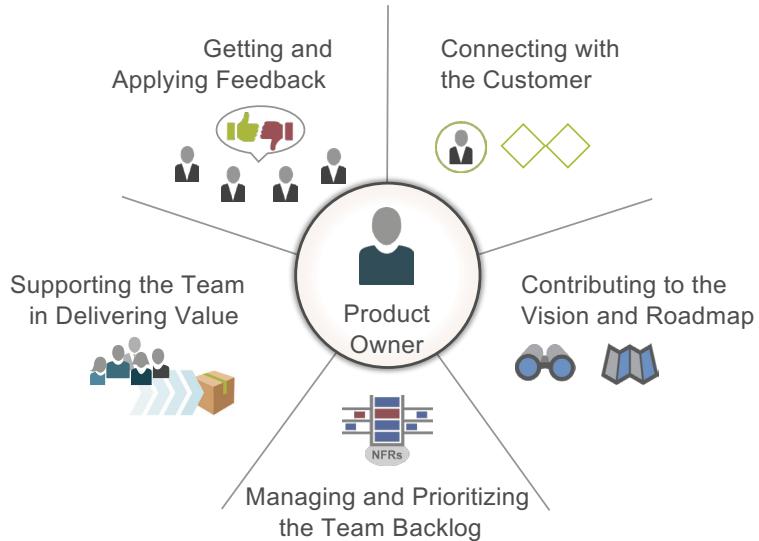
Product Management	Product Owner	Agile Team
		
Facilitates Continuous Exploration	Connects with the Customer	Continuously evolves product design
Guides the Vision and Roadmap	Contributes to the Vision and Roadmap	Implements the Vision and Roadmap
Manages and prioritizes the ART Backlog	Manages and prioritizes the Team Backlog	Works from the Team Backlog
Defines and quantifies value	Supports the team in delivering value	Builds, tests, and delivers increments of value
All seek and apply feedback frequently		

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Customer

1-36

PO areas of responsibility



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Connecting with the Customer

- ▶ Know the Customer
- ▶ Know the stakeholders
- ▶ Identify the problem to be solved
- ▶ Develop whole-product Solutions

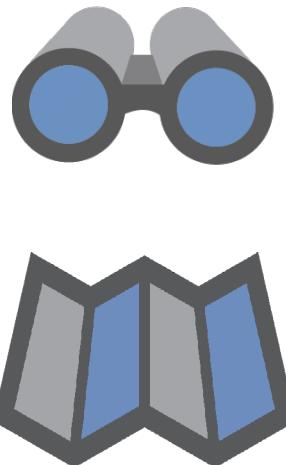


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Contributing to the Vision and Roadmap

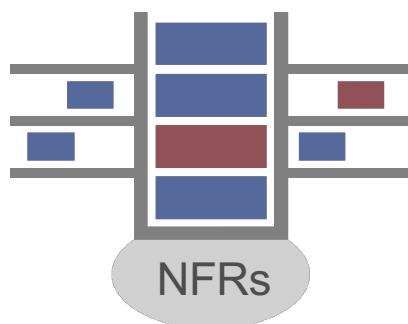
- ▶ Understand market forces
 - ▶ Represent the end user
 - ▶ Assist with ART Backlog prioritization
 - ▶ Educate the ART during PI Planning



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Managing and prioritizing Team Backlog



- ▶ Guide Story creation
 - ▶ Prioritize backlog items
 - ▶ Accept Stories
 - ▶ Support Architectural Runway

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1-40

Supporting the team in value delivery

- ▶ Balance stakeholder perspectives
- ▶ Elaborate Stories
- ▶ Foster Built-in Quality
- ▶ Participate in team and ART events



Getting and applying feedback



- ▶ Test benefit hypotheses
- ▶ Obtain feedback from Customers and stakeholders
- ▶ Share feedback with the ART
- ▶ Evolve Solution design

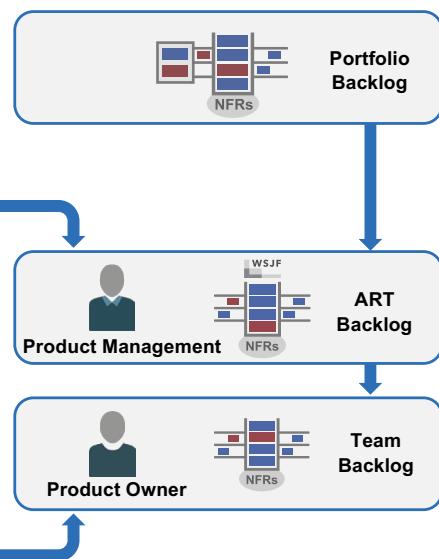
PO and Product Management governance: Content authority

Product Management – ART Backlog

- Has ART Backlog content authority
- Works with the System Architect and team to prioritize Enablers
- Has content authority for Vision and Roadmap
- Helps guide PI Objectives
- Establishes Features and acceptance criteria

Product Owner – Team Backlog

- Has Team Backlog content authority
- Works with the System Architect to prioritize Enablers on the Team Backlog that the team will deliver to support the Architectural Runway
- Guides Iteration Goals and content via prioritized Stories
- Establishes Story acceptance criteria
- Has authority for accepting Stories and team increments
- Helps guide PI Objectives at the team level



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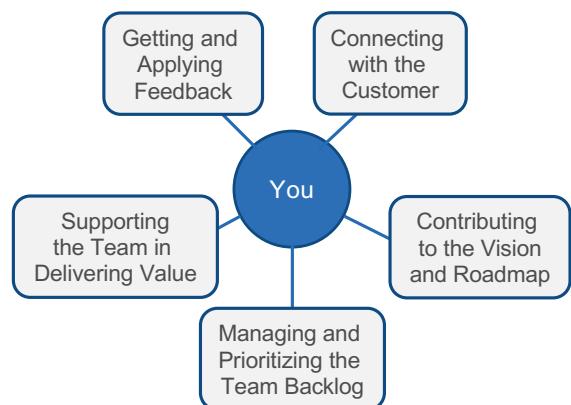
1-43



Activity: Applying PO responsibilities



- Step 1:** Individually, think about the responsibilities of the PO and how they apply in your context
- Step 2:** On the mind map, draw lines and note specific ways each responsibility applies
For example: Who are your Customers and how could you connect with them?
- Step 3:** Be prepared to share with the class



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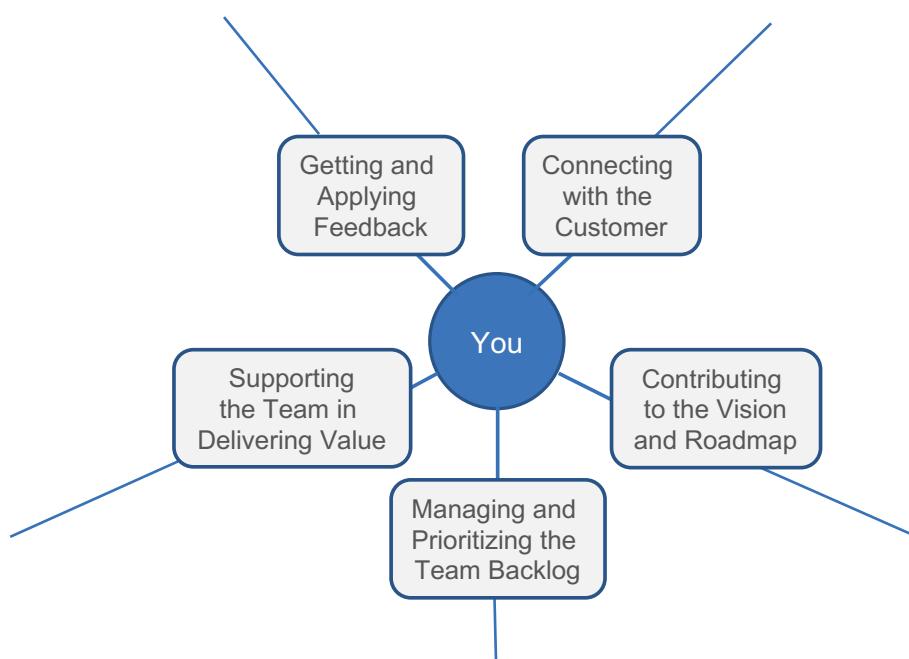
Activity: Applying PO responsibilities

Step 1: Individually, think about the responsibilities of the PO and how they apply in your context

Step 2: On the mind map, draw lines and note specific ways each responsibility applies

For example: Who are your Customers and how could you connect with them?

Step 3: Be prepared to share with the class



Collaboration with other ART roles

ART Roles		
	Release Train Engineer (RTE)	Acts as the chief coach for the train
	System Architect	Provides architectural guidance and technical enablement to the teams on the train
	System Team	Provides processes and tools to integrate, and evaluates assets early and often
	Business Owners	Serve as the key stakeholders on the train

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1-45



Action Plan: Exploring the PO/PM roles and responsibilities



Individually, think about the following questions and answer them in the Action Plan in your workbook.

- As you shift to a Lean-Agile Mindset in your practices, what are some things you plan to do differently?
- How can you help others in your organization think and act with a Lean-Agile Mindset?
- Consider how your organization is organized. What steps could you take to improve how the organization organizes around value?

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1-46



Action Plan

Exploring the PO/PM
roles and responsibilities

Lesson review

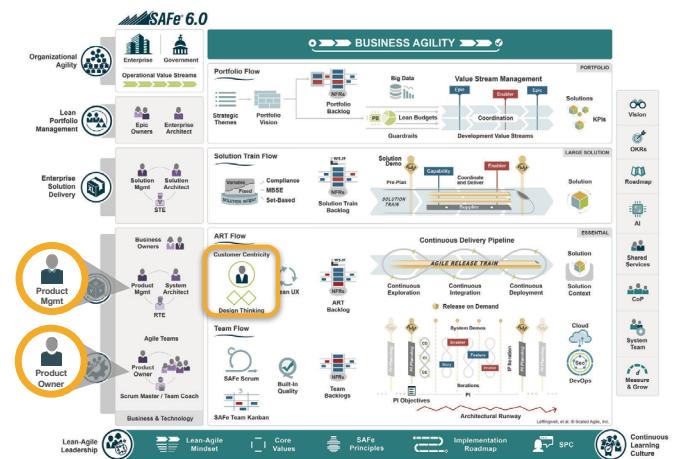
In this lesson, you:

- ▶ Defined SAFe as it relates to Product Owners and Product Management
- ▶ Summarized the Lean-Agile Mindset for decision-making
- ▶ Explained Value Streams and their benefit
- ▶ Summarized the responsibilities of Product Owners and Product Management

Articles used in this lesson

Read these Framework articles to learn more about topics covered in this lesson

- ▶ "Product Management"
<https://www.scaledagileframework.com/product-management/>
- ▶ "Product Owner"
<https://www.scaledagileframework.com/product-owner/>
- ▶ "Customer Centricity"
<https://www.scaledagileframework.com/customer-centricity/>



Continue your SAFe journey with the following resources:

<p>Read the Blog Post, "What's a Product Owner to do?" to find out more about being a Product Owner. https://bit.ly/Blog-ProductOwner</p>	<p>Listen to this 16-minute podcast, "Adopting Lean-Agile UX – Scaled Agile," to learn about Lean-Agile UX, the roles of the PO and Product Manager, servant leadership, and more. https://bit.ly/Podcast-RoleofPOPM</p>
<p>Watch the four-minute video, <i>The Lean-Agile Mindset</i>, to learn more about what makes the Lean-Agile Mindset unique. https://bit.ly/Video-LeanAgileMindset</p>	<p>Go to the SAFe Agile Product Managers group to connect with other Product Managers and ask questions. https://bit.ly/Studio-ProductManagerGroup</p>

References

Agile Manifesto. "Manifesto for Agile Software Development." Updated 2001. <https://agilemanifesto.org>.

Lesson 1 notes

Enter your notes below. If using a digital workbook, save your PDF often so you don't lose any of your notes.

Lesson 2

Preparing for PI Planning

SAFe® Course - Attending this course gives learners access to the SAFe Product Owner / Product Manager exam and related preparation materials.



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Lesson Topics

- 2.1 PI Planning
- 2.2 The Solution Vision
- 2.3 Solution and PI Roadmaps
- 2.4 Customer-centric Features
- 2.5 ART Backlog and Kanban

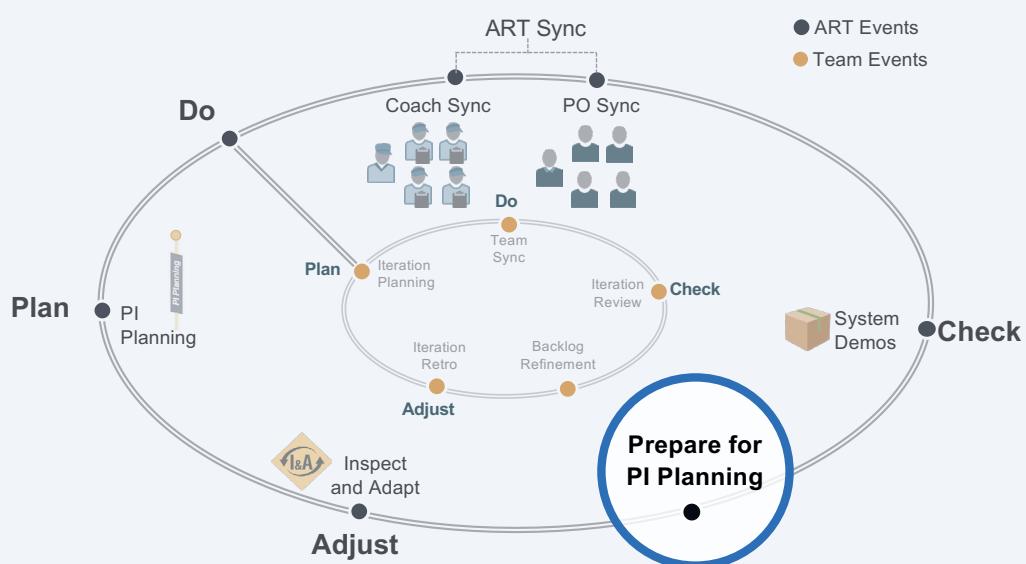


Learning objectives

At the end of this lesson, you should be able to:

- ▶ Summarize PI Planning
- ▶ Explain the Solution Vision
- ▶ Illustrate how to forecast work through Roadmaps
- ▶ Plan beneficial Features
- ▶ Identify how to manage the ART Backlog and Kanban

Preparing for PI Planning



2.1 PI Planning

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2-5



Video: SAFe at Travelport: The Power of PI Planning

Duration
5 min



<https://bit.ly/Video-PowerofPIPlanning>

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2-6

What is a Planning Interval (PI)?

- ▶ A timebox during which an Agile Release Train (ART) delivers incremental value in the form of working, tested software and systems
- ▶ Typically, 8-12 weeks that consists of development Iterations and an Innovation and Planning (IP) Iteration
- ▶ A timebox for planning, building, and validating a full system increment, demonstrating value, and receiving fast feedback

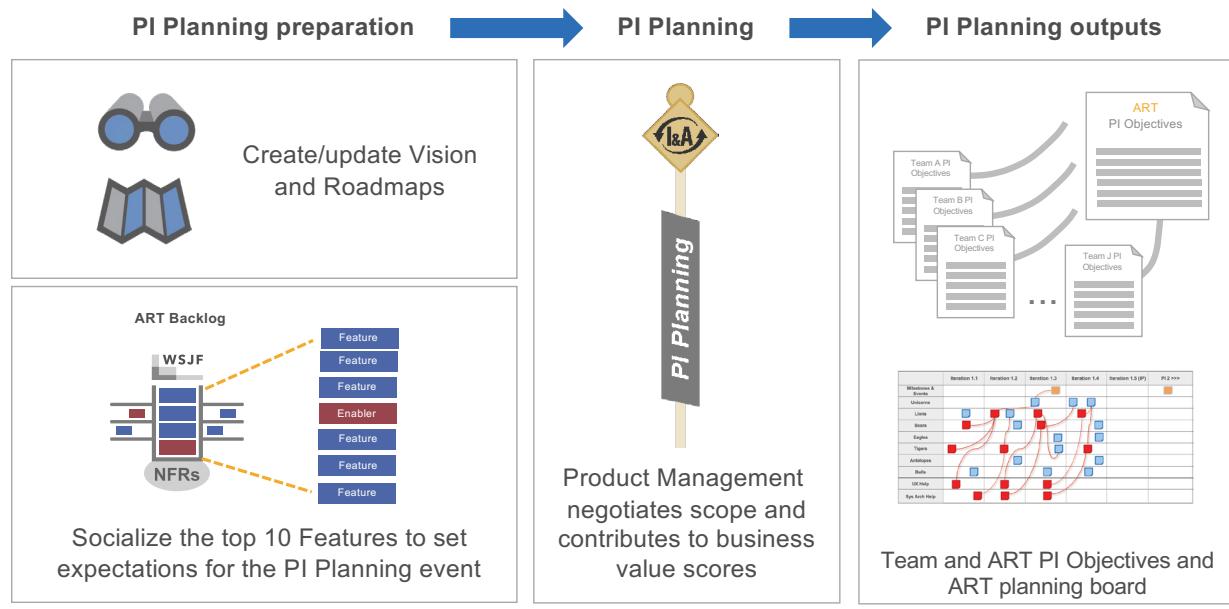


What is PI Planning?

A cadence-based event that serves as the heartbeat of the ART, aligning all teams on the ART to a shared mission and Vision.

- ▶ For every PI (8 – 12 weeks), everyone plans together:
 - Two days for in-person
 - Three to four days for virtual
- ▶ Product Management owns Feature priorities
- ▶ Agile Teams own Story planning and high-level estimates
- ▶ Architect and UX work as intermediaries for governance, interfaces, and dependencies

POs and Product Management are essential to PI Planning



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2-9

The benefits of PI Planning

- Aligns development to business goals with the business context, Vision, and Team/ART PI Objectives
- Identifies dependencies and fosters cross-team and cross-ART collaboration
- Establishes personal communication across all team members and stakeholders
- Provides the opportunity for just the right amount of architecture and Lean User Experience (UX) guidance
- Matches demand to capacity and eliminates excess work in process (WIP)
- Enables fast decision-making

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