

A series of thin, black, overlapping lines forming various geometric shapes like triangles and polygons, creating a complex, abstract pattern in the upper left corner of the slide.

INTRO TO PORTFOLIO EXECUTION

JAMES SMITH



AGENDA

Introduction

The Development Value Stream

Backlog Review and Purpose

How to Get to Executable Facts

What is Done?

INTRODUCTION

Agile is simply a philosophy of learning and discovery.
Processes are used to formalize this philosophy and scale it
with people.

So what should you expect with agile product delivery?

BE LIKE SPACEX



60 (100%) successful production launches in 2022. How did they get to that level of execution?

- Iterate from a challenge to a solution, inspecting and adapting along the way.
- Keep the iterations as small as possible to collect useful data.
- Use the data to prepare for the next iteration.
- Failures then turn into opportunities for continuous improvement.

<https://www.youtube.com/watch?v=xrVqLhhd1zo>

SO WHAT SHOULD YOU GENERALLY EXPECT

- Use less energy to deliver the same amount of work.
- Anxiety wastes energy.
- Work satisfaction conserves energy.
- Happiness produces energy.
- As long as you continuously improve your process of iterating from a challenge to a solution, inspecting and adapting along the way...

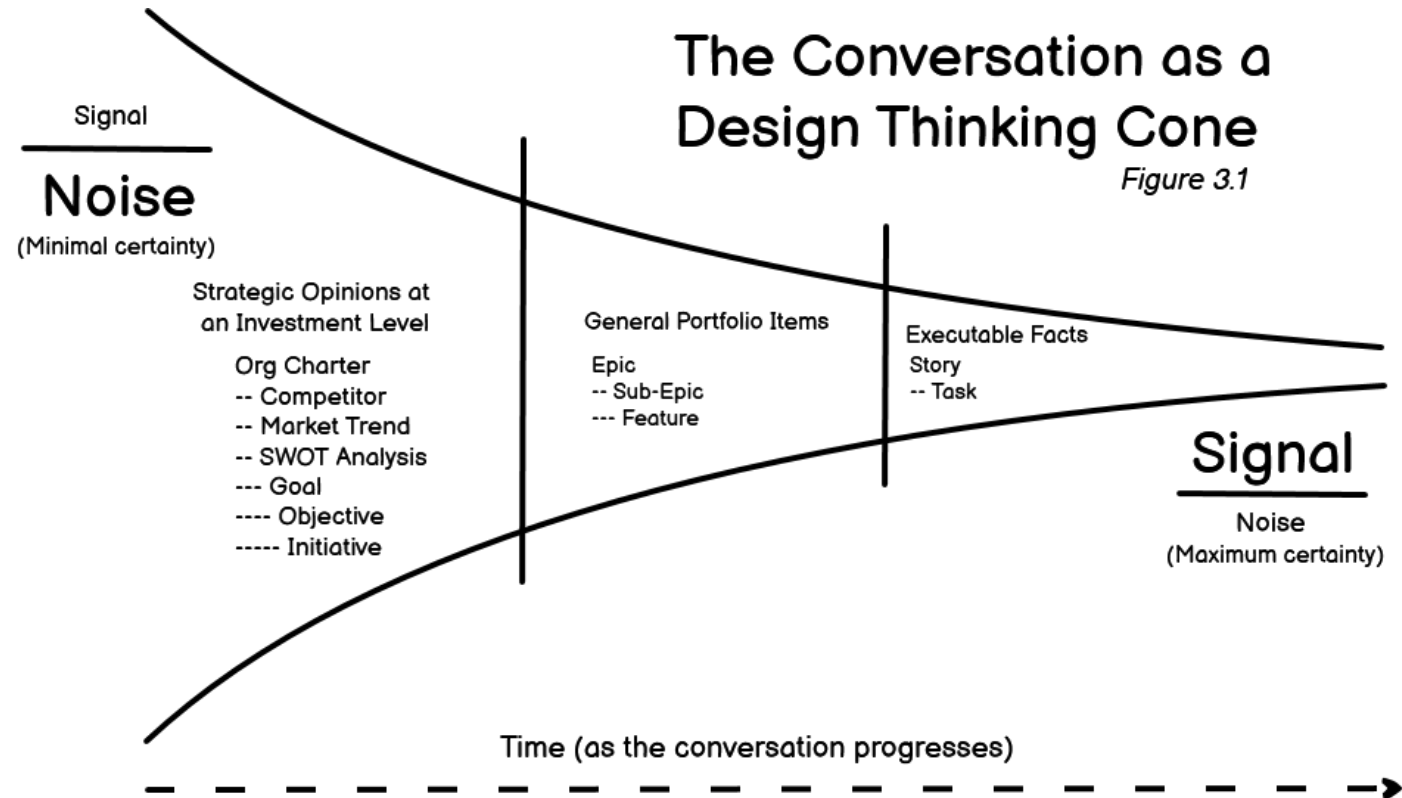
If you don't get these results, your approach to agile product delivery is not working.

ANECDOTES

- 1) NASA shoots for 2 nines (99%) of production reliability. SpaceX has achieved 100% for the same.
- 2) The Story of the Happy Scrum Team



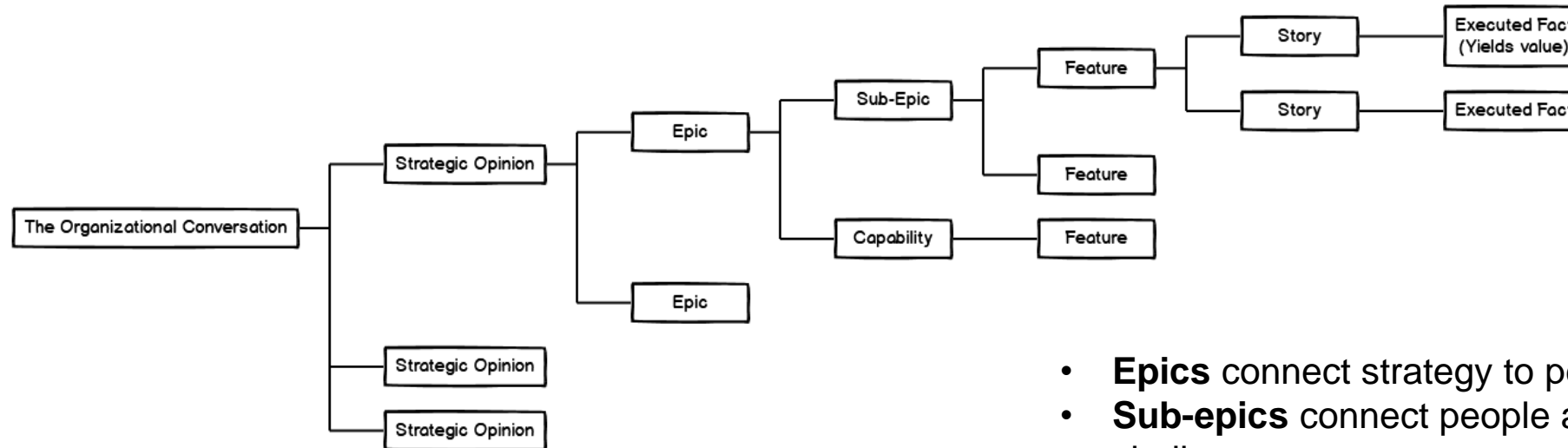
THE ELABORATION VALUE STREAM (HOW THE BACKLOG WORKS)



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THE ELABORATION VALUE STREAM (HOW THE BACKLOG WORKS)

The "Organizational Conversation" is intended to start out with strategic opinions and end with executable facts. To get from opinion to fact, build your conversation like a taxonomy.



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- **Epics** connect strategy to people and markets.
- **Sub-epics** connect people and markets to challenges.
- **Features** connect challenges to solutions.
- **Stories** connect solutions to execution.
- **Tasks** connect execution to implementation.

OTHER WORK-ITEMS

BUG – anything that causes unexpected and undesirable behavior in the product.

SPIKE – a research story that is pulled into a sprint, but violates sprint goals.

- Does not deliver business value and does not contribute to team velocity, but is a research effort container providing estimate information data for a story that does ultimately deliver business value.

THE FULLY REALIZED ELABORATION STREAM

Investment Initiative Conversation Flow

Figure 18.1

(1) Owner Appointed	(2) Acceptance Criteria	(3) Stakeholder Engagement	(4) Dependencies on other Initiatives	(5) Cost of Initiative	(6) Portfolio Capacity
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Investment

(7) Calculate Cost of Barriers	(8) Guardrail Weight	(9) Owner Acceptance	(10) Ready for Portfolio	(11) Cycle Time (S10-S1)+1	(12) Lead Time
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Epic and Sub-Epic Conversation Flow

(13) Owner Assigned, Start the Conversation	(14) Cost of Delay Calculation	(15) Acceptance Criteria Completed	(16) Dependencies Identified	(17) Dependencies Cleared
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(18) Risks Roamed	(19) Enablers Identified	(20) Enablers Cleared	(21) Ready for Owner Review	(22) Owner Accepts, Ready for Sub-Epic or Feature Breakdown	(23) Cycle Time (S10 - S1)+1	(24) Lead Time
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Feature Conversation Flow

(25) Owner Assigned, Start the Conversation	(26) Cost of Delay Calculation	(27) Acceptance Criteria Completed	(28) Dependencies Identified	(29) Dependencies Cleared
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(30) Risks ROAMed	(31) Enablers Identified	(32) Enablers Cleared
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Portfolio

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Execution Team PO	Back to Portfolio Team	Execution Team PO
(33) Ready for PO Review	(34) Under PO Review	(35) Execution Team Estimate Effort
(36) Calculate WSJF	(37) Ready for Execution	(38) Under Execution
		(39) Done
		(40) Deployed to Customer

(41) Acceptance Criteria	(42) Dependencies Identified	(43) Dependencies Cleared	(44) Risks ROAMed	(45) Enablers Identified
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(46) Enablers Cleared	(47) Ready to Estimate	(48) Estimated	(49) Test Cases and Test Data
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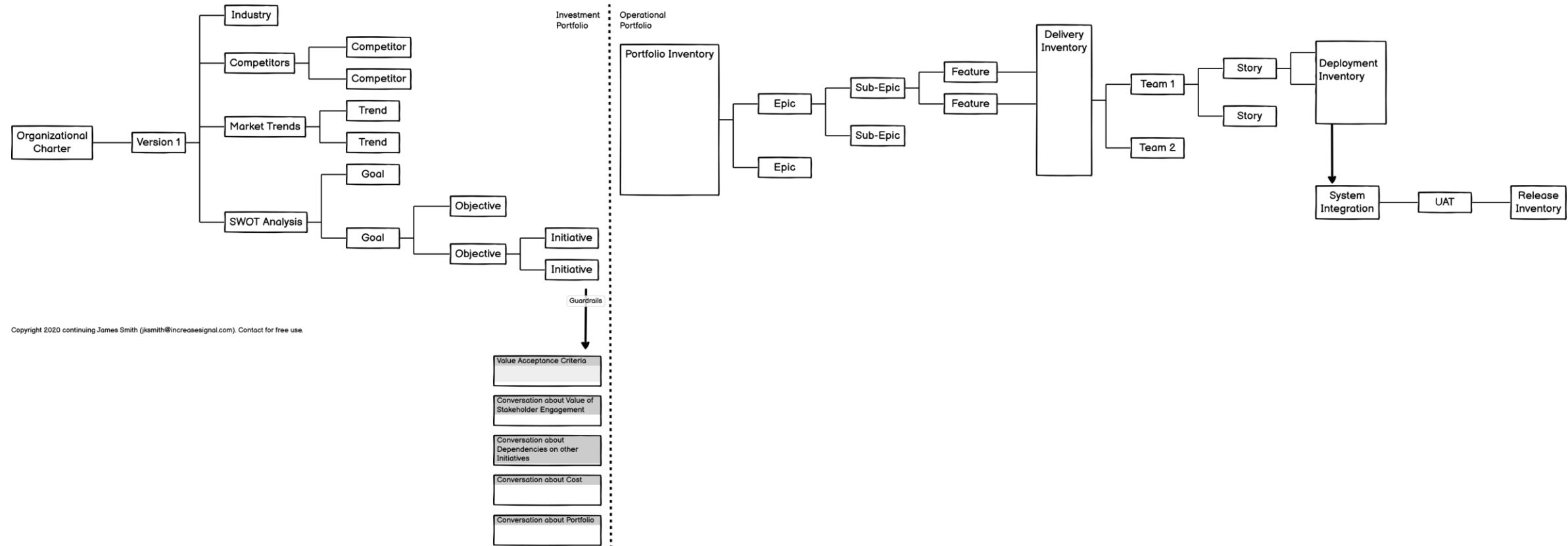
(50) Implementation Plan	(51) Team Review	(52) Meets DoR	(53) In Sprint	(54) Delivered to Customer
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Delivery

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LEFT TO RIGHT FLOW - OPINIONS TO FACTS (DONE!)

Investment Taxonomy *Figure 11.2*

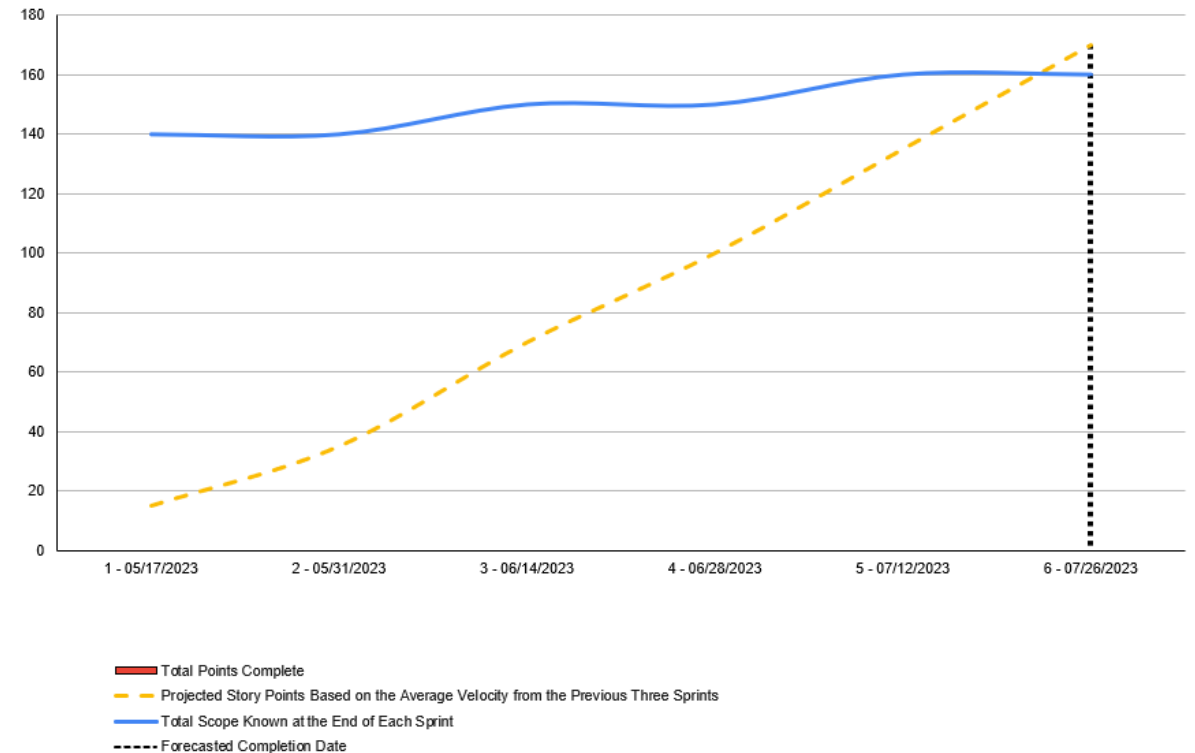


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THE DATE/BUDGET MANAGEMENT FRAMEWORK

- 1) Assemble an Epic Roadmap
- 2) Prioritize Features that are children of the Epics
- 3) Ask responsible team to provide gross point estimates (and/or cost) for each feature
- 4) Total estimates
- 5) Divide total by team's average velocity (and/or team's cost per sprint)
- 6) Plot on burnup chart

Team Release Plan Q2-Q3





FOLLOWUP

- BUG INTAKE TAXONOMY
- WORK-ITEM ELABORATION
- THE DEFINITION OF READY/DEFINITION OF DONE CONTRACT



THANK YOU

James Smith

jksmith@operational.art

Drive up time Tue, Wed, Thu at noon eastern