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What Question are we Voting on When we do a Confidence Vote in PI Planning?

Premise

At the end of the PI Planning event, after we have seen what each of the teams can do, we have a confidence vote which is aimed at understanding how we are feeling in an overall sense about the plan we have seen and commit to that work. Since it is phrased as a “confidence vote”, and the implication is that the question is “how likely is it that we will meet all our objectives” the more analytical among the group will say “well there is probably no chance”. This is true, based on probabilities alone. But most do not vote a 1 often because they do not feel it is not safe to do so, or because they do not feel this provides any additional input.

We want to understand remaining issues and we want a commitment to the work. How should we talk about the vote to make this clear to the people involved?

How To Think About the Confidence Vote?

At the end of the Program Increment Planning Event the train participants (teams, Product Managers, Business Owners, Leadership, etc) participate in a train-wide confidence vote on meeting the Program PI objectives.

Strictly speaking a confidence vote is not the same as a commitment, but we treat it as the same thing.

At this stage the train participants have:

- Spent 1.5 days planning together and 1+ hours hearing about others' plans and risks
- Heard the teams’ agreed Committed and Stretch PI Objectives
- Heard the team’s confidence vote, usually in the 3-5 range
- History of working together (previous PIs) and so have a basis in what has been possible in the past
- An understanding of the scope margin in place identified through the stretch objectives to mitigate some level of uncertainty

So there should be a sense of whether the teams can complete the committed objectives – hence the train confidence vote creates an aggregate view.

The agile approach dictates that commitment must come from the teams doing the work. In addition, a SAFe commitment comes in two parts:

- Teams agree to do everything in their power to meet the agreed-to objectives
- If, during the course of the PI, facts dictate that some objectives are simply not achievable, then

the teams agree to escalate immediately so that corrective action can be taken

The confidence vote is a response to the question “How confident are you that the Train will complete the committed objectives?”:

1. No confidence, we will absolutely not meet our objectives
2. Little confidence, I have some serious reservations with the plan that I have heard – we are all ignoring the elephant(s) in the room
3. Good confidence, but I have some (normal) concerns based on history, expect we will have to deal with changing priorities, but feel that the train should be able to meet their objectives
4. High confidence, I can think of one or two things that could derail this plan, but feel that the train should be able to meet their objectives
5. Very high confidence, I have no reservations with the plan and think that the train will meet its objectives

At the end of PI Planning, there should be good confidence based on what people know and have seen and heard from others.

As a result of this act, the stakeholders will know that either:

- The Program results will be achieved as planned
- They will be informed as soon as anything changes so that adjustments can be made.

If someone feels that there are risks, or doesn't think there is sufficient capacity / scope buffer, or that we’ve all missed “the elephant in the room” … they should raise it.

It is up to leadership to determine what, if anything, to do about the concern. Since we are at the end of the event, the issue might simply be accepted or it could become a subject for the train PI planning retrospective aimed at seeing what we can do to improve our level of confidence in the future.

To expect that completion is not possible indicates a larger issue that should be discussed and remedied prior to the next planning event.

Consultant, Tools, PIPlanning, Program, ConfidenceVote, Planning, Ceremony, PIObjectives, SAFe, FAQ

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