

# Marketing and Editorial Style Guide

January 2020

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# Style Guide Overview

# Using this guide

Scaled Agile, Inc. written communications present an opportunity to build the value and consistency of the company brand. This style guide explains general rules for on-brand writing, grammar, and punctuation.

## Use this guide to:

- Create effective, internal- and external-facing communications that reflect our vision and messaging, and influence how we're perceived
- Communicate to and connect with various audiences (from change agents to IT decision-makers to C-level executives)
- Reinforce the Scaled Agile brand consistently and drive success for our customers and our company

# Scaled Agile vision 2020

Our vision is to make the world a better place by enabling enterprises to continually deliver innovative business solutions.

# Scaled Agile mission 2020

Our mission is to be the trusted provider of a system that enables our customers to achieve and sustain business agility.

# Elevator pitches

## 80-word company description

### **About Scaled Agile, Inc. (SAI)**

Scaled Agile, Inc. is the provider of SAFe®, the world's leading framework for business agility. Through learning and certification, a global partner network, and a growing community of over 500,000 trained professionals, Scaled Agile helps organizations build agility into their culture so they can quickly identify and deliver customer value, capitalize on emerging opportunities, and improve business outcomes. Scaled Agile is a contributing member of the Pledge 1% corporate philanthropy and community service movement. Learn more at [scaledagile.com](https://scaledagile.com).

## 50-word company description

### **About Scaled Agile, Inc.**

Scaled Agile, Inc. provides SAFe®, the world's leading framework for business agility. Through learning and certification, a global partner network, and 500,000 trained professionals, Scaled Agile helps organizations build agility into their culture to deliver customer value, capitalize on opportunities, and improve business outcomes. Learn more at [scaledagile.com](https://scaledagile.com).

## 25-word company description

### **About Scaled Agile, Inc.**

Scaled Agile, Inc., is the provider of SAFe®, the world's leading framework for business agility. Visit [scaledagile.com](https://scaledagile.com) to learn more.

# Company voice

Our voice reflects our brand personality and characterizes everything we write and communicate. And although our headquarters is in the United States, we write with a global audience in mind. For tips, read [“Writing for a Global Audience – 25 Dos and Dont’s.”](#)

How you should speak to your audience—in first-, second-, or third-person voice—will depend on what method you’re using to communicate with them. Read the article, [“First, second, and third person,”](#) for a basic explanation of each voice. The table to the right provides examples of communications for each voice (note that some voices can be appropriate for multiple deliverable types).

<b>First person</b>	I, we	Blog, podcast, email, FAQ, video
<b>Second person</b>	You	Blog, brochure/guide, executive brief, email, email newsletters, podcast, video, executive brief, FAQ
<b>Third person</b>	He, she, it, they	White paper, technical SAFe article, case study, video, data sheet



When crafting content, write in active, conversational language that resonates with your target audience. Always consider the customer's perspective and address their most important needs and pain points. Communicate how customers can use our Framework and training to realize specific benefits. By placing customer benefits front and center, our audience can better understand how we can help them achieve their goals.

**Do:**

- Write like you're having a conversation with the audience
- Write in clear, concise language that's easy to understand
- Be assertive in reflecting our subject matter expertise

**Don't:**

- Be condescending
- Be needlessly wordy or complex
- Be boastful or brag

**Example:**

To compete in a disruptive global market, every organization needs to deliver quality solutions and value to customers and the business at the right time. SAFe® DevOps helps key members of an organization—including development, operations, security, compliance, and testing—improve the complete flow of value from concept to cash.

You'll understand what DevOps is, the cultural shift required to embrace it, and how it helps you deliver value faster and more predictably. You'll map the Value Stream through your own delivery pipeline and identify practices to spot and eliminate bottlenecks—enabling continuous improvement and accelerating time-to-market.

# Writing basics

## Calls to action

Always include a clear call to action (CTA) at the end of your communication.

CTAs are those buttons or links that let someone know what action they should take. Keep your CTA clear, concise, and actionable:

For emails and landing pages, phrases such as “Register Now,” “Read Blog,” “Reserve My Spot,” and “Save My Seat,” are all good options.



Phrases such as “Click Here,” “Submit,” and “Register” are too bland and won’t grab attention.



For collateral, end your piece with a single CTA message. Too many CTAs with different messages can be confusing, even if they lead to the same destination.

Readers won’t know what to do if they get inconsistent messages.

### Examples:

- Send an email to [support@scaledagile.com](mailto:support@scaledagile.com).
- Visit [scaledagile.com](https://scaledagile.com) to find a class near you.

## SAFe vs. Scaled Agile Framework

- On first reference, always spell out the full name, followed by the acronym in parentheses. Use the appropriate registration mark and styling shown in the following example.

**Example:** Scaled Agile Framework® (SAFe®)

Abbreviate on subsequent references.

**Example:** SAFe

- If a passage frequently mentions SAFe, you may use the following terms interchangeably: SAFe, Scaled Agile Framework, the Framework.
- Don't use the term SAFe Framework; it's redundant.
- Avoid SAFe puns.

**Examples:** SAFe haven, SAFe-keeping, SAFe and sound, etc.

- If referring to frameworks in general, use lowercase.

**Example:** The world's leading framework for business agility.

## SAFe Principles

- Whenever mentioning a SAFe Principle, use sentence case with capitalization for the word *Principle*, and a pound sign before the principle number.

**Example:**

As we mentioned in Principle #1, Take an economic view ...

## Scaled Agile, Inc.

- Use Scaled Agile, Inc. in first reference. Use Scaled Agile for subsequent references. Never use the acronym *SAI* in marketing copy and never without first introducing Scaled Agile, Inc.

**Example:**

Scaled Agile, Inc. (SAI)

## Scaled Agile Events

- Write our main events as follows (using ® after "SAFe" on first reference):
  - European SAFe Summit
  - Global SAFe Summit
  - SAFe Days, and individually as SAFe Day Government, SAFe Day Singapore, etc.

## Email basics

When writing emails, follow these five best practices:

- 1** Write your subject lines using title case.  
  
**Example:**  
Announcing the Latest Version of SAFe
- 2** Tie the subject line, preheader, and headline together to tell a story.
- 3** Don't restate headlines in the copy immediately following the actual headline.
- 4** Get right to the point with your copy. Tell the reader what they'll learn or achieve rather than what Scaled Agile has done.
- 5** Use exclamation points sparingly and only when you'd be comfortable shouting the copy aloud.

# Marketing Collateral Types

## Brochure or guide

Can be used for a variety of purposes; brochures and guides are not technical in nature and are approximately two to four pages long.

## Case study

An in-depth customer story that details wins, challenges, how SAFe was applied, shared best practices, and benefits realized by the customer.

## Data sheet

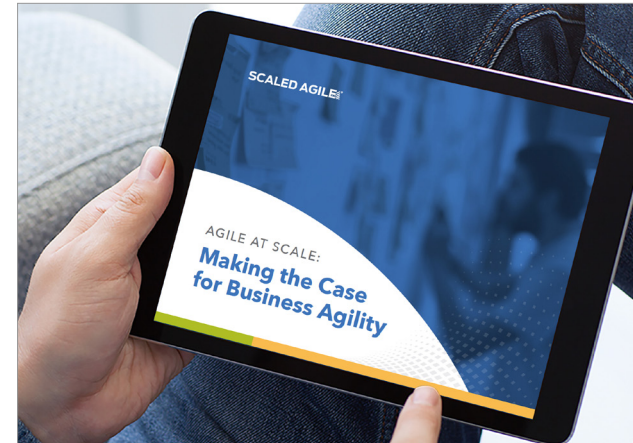
A two-sided document that focuses on the key features, benefits, and differentiators for courses.

## E-book

Longer than a brochure, an e-book is delivered digitally and optimized for reading on a computer, tablet, and other electronic devices.

## Executive brief

Similar to a white paper, but not technical, this longer-form piece is intended for an executive audience, discusses an industry trend and its associated business challenges, and presents SAFe as a viable solution.



E-book



Data Sheet

## Lean Enterprise Executive Series

A shorter, brochure-like deliverable that discusses an industry trend or SAFe-related concept or practice at a high level for an executive audience.

## Infographic

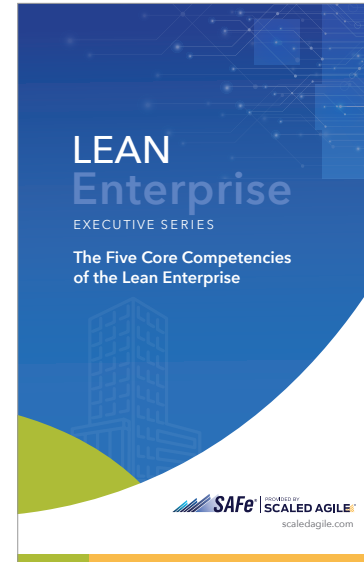
A very visual piece with minimal copy that gets information across in a unique way.

## White paper

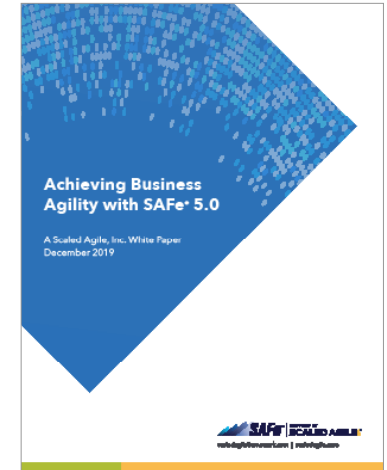
A longer-form piece that discusses an industry trend or a SAFe-related concept or practice in an educational manner; generally technical in nature.

## Need to start a creative project?

Fill out an [Agile creative brief](#).



Lean Enterprise Executive Series



White Paper

# Editorial Guidelines



# General style and usage

The following are some helpful tips, exceptions, and customizations to help you consistently express Scaled Agile's writing style.

- Scaled Agile uses the *Chicago Manual of Style* as the default for style. However, there are a number of exceptions to those guidelines as described in this document.
- Use [Merriam-Webster online dictionary](#) as the default dictionary.

# Legal considerations

## Research and permissions

- In general, when citing articles, reports, etc., avoid using anything older than two years.
- When citing sources in digital instances (websites, online articles, blogs, etc.), hyperlink to the source in the body copy and use footnotes at the bottom of the page where the citation appears.
- To cite sources from Gartner, please send an email to [JB](#) or [Regina](#) in marketing to get permission.

**Note:** It could take two to three days for approval, and not every Gartner resource is available to cite publicly.

- See [Appendix F](#) for a list of approved abbreviations and those we don't recommend using.

## Trademarks

Scaled Agile owns the following trademarks:

- Scaled Agile Framework®
- SAFe®

## ® on SAFe trademark notices

- Use ® on first appearance of a trademark in a chapter, book, white paper, or presentation. This applies to both Scaled Agile Framework® and SAFe®.
- Use ® on covers and branded artwork.
- Use ® on footers/headers and similar copyright notification references on interior pages.
- Use ® on first instance, whether interior headlines, subheads, or body text.

### Exception:

When SAFe is first introduced in courseware (typically first module), add the ® initially to help reinforce it when the introduction is made.

- If you are unsure, err on the side of using the ® on first appearance only.

### Exception:

Use the ® mark in every instance of a full course name.

## Formatting trademarks

- Whenever possible, apply superscript formatting to the ® mark. This reduces the size of the mark and places it slightly above the baseline.

### Example:

- Without superscript styling: SAFe®
- With superscript styling: SAFe<sup>®</sup>
- The superscript style is available in html and most applications in use at Scaled Agile, including Microsoft and Adobe. To quickly add the ® in Microsoft Office applications, type (r). In other applications, use the Mac shortcut Command-R, or the Windows shortcut Control-Alt-R.

# Grammar and style pointers

## Acronyms

- Define SAFe on first mention (with trademarks) in collateral, such as white papers and brochures, and in communications to audiences who are new to SAFe.

### Example:

Organizations worldwide use the Scaled Agile Framework® (SAFe®) to improve business outcomes.

### Exception:

It's not necessary to define SAFe in email newsletters for audiences who are familiar with SAFe and who have opted in to our communications.

- Spell out the full phrase on first mention; then refer to the acronym in parentheses in all subsequent instances.

### Example:

The Agile Release Train (ART) is made up of all the significant members of the team. The ART should also include stakeholders and vendors.

- Define an acronym on first instance in body copy, not in titles or headings (spell it out instead), except in cases where the heading or subhead is too long and only if

you've introduced it first as described above. Never use italics or quotations to set off the term before the abbreviation.

- If the acronym does not appear anywhere else in the deliverable, there's no need to define or include the acronym. Sometimes it's OK to use acronyms that are well-known and familiar to the target audience, such as ROI, B2B, KPI.
- See [Appendix F](#) for a list of approved abbreviations and those we don't recommend using.

## Plural vs. possessive

- Use plural and the possessive punctuation for acronyms just as you would for any word.

### Example:

I had a VCR. The VCR's power button was broken. I bought another VCR, so I had two VCRs. Then the second one's channel selector button broke, so I could tell that the VCRs' buttons were made cheaply.

## And

- Always write out the word *and* in text. Don't use ampersands or plus signs, unless it's in a graphic, chart, sidebar, or table where space is limited and won't fit.

### Exception:

I&A, the abbreviation for Inspect and Adapt.

## Book titles

- Book and periodical titles (that is titles of larger works) are italicized. This is not to be confused with the titles of articles and chapters, which are enclosed in quotes. (See [Chapter References in Text in Appendix D](#))

## Bulleted lists

- Generally, use a sentence to introduce the bullets, with a colon preceding the bulleted list.

### Example:

Organizations using SAFe have realized the following:

- 25 - 75 percent increase in productivity
- 25 - 75 percent increase in quality
- 30 - 75 percent faster time-to-market
- 10 - 50 percent measurable increase in employee engagement

- Run-ins are format devices that lead the reader into body copy, while signaling that the highlighted text is important. Bold the run-in, followed by a hyphen with one space on either side.

### Examples:

**Leadership support** - Some senior leaders may have already been trained in SAFe and will be anxious to put their training to work. Most likely, many of these leaders have had previous experience with Agile development.

**Clear products or solutions** - SAFe is most easily applied to a clear and tangible solution, something the company sells directly or values highly.

- Start the bullet with a capital letter, include a benefit, and write your bullets consistently. (If you start the first bullet with an action verb as shown in the following examples, start all the bullets in the list the same way.)

**Examples:**

- Adopt SAFe Principles and practices to continuously and predictably flow value to your customers and the business
  - Empower your teams to be more efficient and productive by decentralizing decision-making
- If the bullet is a fragment, make sure all the other bullets in the list are fragments too (without periods). For presentations, brevity wins—use fragments.
- Same goes for full sentences: make sure all the other bullets are full sentences, too.

**Note:** If meeting this guideline requires a material change to the content, check with the content author for approval.

**Examples (fragments):**

- 25 - 75 percent increase in productivity
- Measurable increase in employee engagement and satisfaction

**Examples (full sentence bullets):**

- Create a collaborative culture with high-performing, cross-functional teams that drive technical alignment and value to the business
  - Accelerate time-to-market of quality products that delight customers and drive revenue
  - Build higher-quality software and deliver it to citizens, warfighters, and other government personnel and agencies, faster
- Don't end bullets with a period, unless the bullet phrase is composed of two [or more] sentences. In this case, use periods consistently within the list. This may result in some lists having periods and some not.

## Capitalization

- Use title case (initial-cap all words except for prepositions or articles) in titles, section headers, and email subject lines. The rules for title case can be intricate. Refer to the *Chicago Manual of Style* for more detail.

**Example:**

- Five Reasons You Need DevOps

- Use sentence case in subheads, body copy, and captions.

**Example:**

- Common, but marginally effective

- Use initial caps (not italics) in titles for videos.

**Example:**

The Power of PI Planning, Successfully Running a Retrospective, etc.

- All SAFe roles on the Big Picture should always be capitalized.

**Exceptions:**

- *supplier* and *customer* should be lowercase (they're too common to merit caps) after the first, linked mention.

**Example:**

- The definitive and most up-to-date list of all Big Picture elements (roles and artifacts) is in the glossary on the [Scaled Agile Framework site](#).

- Treat SAFe meetings and ceremonies with the same rules as SAFe Big Picture artifacts: title case on first use, lowercase in subsequent use.

See the entire [SAI marketing and courseware capitalization lists here](#).

## Gender

- Use *he* and *she* and *his* and *her* randomly, not *his* or *her* or *his/her*
- In place of *his* or *her* or *his/her*, it is also acceptable to use *they*, if appropriate, to the singular or plural requirements of the pronoun

## Italics used for emphasis

- Use italics to emphasize words in the body text (don't **bold**, use "quote marks," underlines, or CAPS)
- Don't use colored text for emphasis, except in rare cases
- Avoid heavy use of italics for emphasis, and avoid using italics for emphasis altogether when italics are being used for other reasons—such as for the name of an article—within the same sentence or paragraph

## Numbers

- Spell out numbers below 10 (nine, eight, seven, etc.); use numerals for higher numbers (10, 11, 12, etc.)
- Use numerals for similar items, but not for all things in a paragraph

### Example:

"Between eight and 12 weeks" is wrong. "Between 8 - 12 weeks" is correct.



## Pull quotes

- Italicize only the quote, not the source.
- Precede the source with an em dash.

**Example:**

*Business people and developers must work together daily throughout the project.* –Agile Manifesto

- If the quote is a full sentence, end with a period. Use the ellipsis if the quote is a fragment of the quoted material, use the ellipses with a space between the last word and the ellipses. If the quoted material was itself a fragment, don't use the ellipsis.

**Example:**

"Go Broncos ..."

## Titles

- People's position titles should be lowercase if they follow the people's names or are used generically

**Example:**

Dan Oppenheimer, vice president of operations at Dunning Widgets, says he loves Agile.

- Capitalize people's titles when they precede their name

**Example:**

Release Train Engineer Tamara Nation gave a smashing performance at the Global SAFe Summit.

# Punctuation

## Commas

- SAI uses serial (a.k.a. Oxford) commas, meaning that in a list of items, the last one before the *and* is followed by a comma

**Examples:**

- Without Oxford comma: I admire my parents, JFK and Stalin.
- With Oxford comma: I admire my parents, JFK, and Stalin.

## Ellipses

- Insert a space before and after ellipses

**Example:**

- And the Oscar goes to ... Spike Lee!

## Em dashes (long dash—)

- We use em dashes to indicate a pause, an aside, or a quote attribution

**Example:**

No matter which flavor you like most—sesame, onion, or everything—bagels are delicious.

- Em dashes are closed: no spaces on either side

**Shortcut:**

Create an em dash on a Mac with Option + Shift + "-" (hyphen key)

**Shortcut:**

Create an em dash in Windows with Alt + Shift + "-" (hyphen key)

## En dashes (mid-length dash - )

- Use an en dash to indicate a range

**Example:**

Join us for the SAFe® for Architects course, March 5 - 7 in Boulder, Colorado.

- En dashes have spaces on either side

**Shortcut:**

Create an en dash on a Mac with Option + “-” (hyphen key)

**Shortcut:**

Create an en dash in Windows with Alt + “-” (hyphen key)

## Hyphens

- Use to group words into a single concept

**Examples:**

- Time-to-market
- Customer-facing
- Large-scale

- If necessary, hyphenate if the word grouping is modifying something as an adjective

**Example:**

Customer-facing employees should dress appropriately.

## Percent

- Spell out *percent* after a number in body copy

### Example:

- 99-percent uptime
  - 73 percent
- Use the % symbol in elements including graphics, charts, sidebars, and tables

## Periods and spacing between sentences

- Use only one space after a period and before the start of the next sentence

## Punctuation and quotation marks

- When using single or double quotation marks in a sentence, place punctuation inside the quotation marks

### Examples:

- At Scaled Agile, we often use words that have special meaning, like 'iterate,' 'timebox,' and 'retrospective.'
- Tommy asked, "Can we have ice cream for dinner?"
- "The weather today is lovely," said no one in Buffalo, ever.

## Quotation marks

- Use double quote marks ( " " ) only when something is literally being quoted, for example, a person speaking or an excerpt
- Use single quote marks ( ' ' ) in other instances, such as when you're calling out an original use of a term or a slang term

## Slashes

- When using slashes, don't insert a space between the words and the slash

### Example:

Solution Architect/Engineer

# Appendices

## Appendix A: Special instructions for SAFe WordPress articles

### Headings

- Title and Details: Heading 1.
- Article content: Headings 2 and 3 (Do not go to heading 4, rarely 3.) Headings should be capitalized as titles. Use these styles in Word document originals so they automatically import into WordPress.
- Learn More: Heading 2.

#### Heading style:

When applicable, begin H2 and H3 headings with an active verb (learning-objective format). Heading 2s should tell a short story; it's best if you can read just the headings and get a sense of the article.

### Capitalization

- Initial-cap words in all headings, but don't capitalize prepositions or articles.

#### Exception:

SAFe Principles should be sentence case. Example: "Apply systems thinking."

- All roles should always be capitalized (for example, Product Owner, Scrum Master, Epic Owner).

#### Exception:

*Customer* and *Supplier* may appear lower case due to frequency of use.

### Grabber quotes

- One grabber quote per article. Quote and source are flush left. Format manually. Italicize quote, but not the source. (The formatting should do that automatically.) Neither are bold. Precede the source with an em dash (Option+Shift+ "-"). One blank line between quote and byline.

#### Example:

– *Business people and developers must work together daily throughout the project.*

–Agile Manifesto

- If the quote is a full sentence, end with a period. If it's a phrase or a fragment, end with an ellipsis (...). Ensure that there is a space between the last word and the ellipsis ... like so.

## Link and capitalize Big Picture elements on first use

On first use, capitalize and link the first reference to any Big Picture element. This is true for the entire article, including glossary entry (see next section). After that, do not capitalize or link.

### **Exception:**

Roles are capitalized throughout.

## Glossary and introduction section

- After the grabber quote, the first paragraph (no more than two sentences) is the official glossary element. Use the following tags so that we can automatically compile the glossary: [glossary title="Term"] insert copy here [/glossary].
- Then briefly introduce the reader to the topic and sets the context for the rest of the article. 100 - 200 words.

## Details

- After the glossary entry and introduction, the article should explain the topic in 800 - 1,500 words. The first section after Details does not need a heading (generally, no back-to-back headings). No need to repeat the intro or restate the obvious. Thereafter, use Heading 2 for topic headings (Heading 3 sparingly).
- The first reference to a specific article name in the introduction or details of that article should be placed in italics for emphasis.

### **Example:**

*PI Objectives* are a summarized description of the specific business and technical goals to ...

- When referring to a reference that appears in Learn More, use the following format: [ref-number].

### **Example:**

Some teams use other XP practices such as a pair programming and metaphor [2].

## Figures/graphics

- All figure text should appear in the built-in caption area. Use the WordPress caption field, available in the menu that appears when the image is clicked.
- Both the figure and its caption should be centered on the page. Figure format is sentence case, with no period at the end of caption, unless there are multiple sentences in the caption.

### Examples:

- Figure 1. This is normal figure text
- Figure 2. This is figure text too. But it has a second sentence.

- When referring to a figure, call it out specifically.

### Example:

"Figure one illustrates ..."

- Introduce a figure in the sentence immediately preceding it. Do not separate text references to a figure with intermediary sentences or paragraphs.
- Do not refer to the physical location of a figure within a page. Do not describe the figure as *below*, *above*, to the *right*, or to the *left*.

## Standard format for role articles

- For an example, see [Scrum Master article](#) on the Scaled Agile Framework website.
- Details is a paragraph or so summarizing responsibilities.
- The next Heading 2 is Responsibilities. This is typically a bulleted list with explanation. Other Heading 2s are then whatever makes sense for that role.
- FYI: We structured roles this way to help companies easily find information to include in a job description.



## Learn more section

- Generally, recommend one to three books or websites where the reader can gain more knowledge on the topic. Some of these will have been referenced in Details or the grabber quote.

### Example:

- [1] Manifesto for Agile Software Development.  
<http://agilemanifesto.org/>.
  - [2] Reinertsen, Donald. *The Principles of Product Development Flow: Second Generation Lean Product Development*. Celeritas Publishing, 2009.
  - [3] Rother, Mike. *Toyota Kata: Managing People for Improvement, Adaptiveness, and Superior Results*. McGraw-Hill, 2009.
- Use this html to build the parting line (just before the Learn More heading), with a line break on each side: `<hr align="left" size="1" width="33%" />`

**Note:** If there are no References, use the horizontal line to separate the article and the copyright notice.

## References - bibliography citations and annotations

- When you refer to a reference in the text, the standard usage is: [2]. But in a caption in WordPress, use parentheses ( ) instead, as square brackets are interpreted differently.

## Last update

- Update the date each time the article is changed. Put a last update field, centered above the copyright notice in the following format:
  - Last update: 14 August, 2017

## Guidance articles

- Guidance articles can generally adhere to article guidelines, but as they are often written by others and are longer, strict adherence is not required. Also, linking to SAFe is not required.

## Appendix B: Special instructions for PowerPoint presentations

In general, these editorial guidelines apply to PowerPoint presentations. However, there are some exceptions. To see those, as well as visual styling (fonts, layouts, figures, etc.), please refer to the [PPT Styles Quick Start style guide](#).

## Appendix C: References – Bibliography citations and annotations

### Book with one author

[1] Leffingwell, Dean. *Scaling Software Agility: Best Practices for Large Enterprises*. Addison-Wesley, 2007.

**Note:** We do not include the publisher city.

### Book with two or more authors

[2] Womack, James P., Daniel T. Jones, and Daniel Roos. *The Machine That Changed the World: The Story of Lean Production—Toyota’s Secret Weapon in the Global Car Wars That Is Now Revolutionizing World Industry*. Free Press, 2007.

### For Kindle edition

Instead of a publication date, use *Kindle Edition*.

**Note:** To avoid maintenance necessitated by revised editions, there is no need to include chapter or page numbers.

## Appendix D: Special instructions for print and books (SAFe® Distilled)

### Figures and figure captions

- Both the figure and its caption should be centered on the page
- Figure caption style format is sentence case, with a period after the figure number, but no period at the end
- If there are multiple sentences in the caption, separate with punctuation
- Don't bold or italicize figure number
- Capital F in Figure

### Chapter references in text

- The word *chapter* should be lowercase when used in body text. The chapter name that follows the word *chapter* should be in double quotes.

**Example:**

In chapter 15, "Portfolio Level Overview," we discuss ways to budget effectively.

- For figure numbers, use this format: X-Y. X= chapter number. Y=sequential caption number.

**Examples:**

- Figure 1-1. This is normal figure text
- Figure 2-1. This is figure text too. But it has a second sentence so uses periods.
- When referring to a figure, call it out specifically, that is "In Figure 6-2, the teams break out into groups ..." Use this sentence construction, and not "the figure above shows ..." Also, note that the word *Figure* when referring to an image is always capitalized.
- Introduce a figure in the sentence immediately preceding it. Do not separate text references to a figure with intermediary sentences or paragraphs.

## Appendix E: FAQ words

- **Agile** - When referring to the method, either as a noun or an adjective, always capitalize the "A"
- **agility** - Lowercase
- **Agile Manifesto** - Capitalize, but no quotation marks, italics, etc. Keep it simple. (Exception: *The Manifesto for Agile Software Development* should be capitalized and italicized, as shown here, because it's the name of an important document.)
- **Agile Release Train** - Capitalize all words in the phrase (that is, "Agile Release Train" not "Agile release train")
- **ART** - Capitalize
- **ART demo** - See [Ceremonies and meetings](#)
- **Backlog** - Lowercase backlog in general case. For references specific to Big Picture, such as *Portfolio Backlog*, *Team Backlog*, (see [Link and Capitalize Big Picture elements](#) on first use in Appendix A).
- **Big Picture** - Capitalize. Not in quotes. First use should include SAFe preceding *Big Picture* (example: SAFe Big Picture).
- **collocate, collocated** - No hyphen
- **Cross-functional** - Hyphenate
- **Cumulative Flow Diagram (CFD)** - Capitalize
- **Daily Stand-up (DSU)** - Abbreviate after first use
- **Decision-making** - Hyphenate
- **Definition of Done (DoD)** - Capitalize as shown here (see [Ceremonies and meetings](#))
- **demo, demos, demoed** - Lowercase
- **enterprise-wide** - lowercase with hyphen
- **Extreme Programming (XP)** - Use in place of *eXtreme* or *Xtreme Programming* and capitalize
- **Framework** - SAFe is preferred to "the Framework." However, avoid using SAFe too often in the text. The reader knows that the overriding topic is SAFe.
- **House of Lean** - Capitalize
- **Iteration** - Use in place of *sprint*
- **Iteration Planning** - see [Ceremonies and meetings](#)

- **iteration retrospective** – see [Ceremonies and meetings](#)
- **kaizen** – Lowercase
- **Kanban** – Capitalize
- **lead time** – Two words, no hyphen
- **Lean** – When referring to the method, capitalize the “L.” Err on the side of capitalizing when unsure. It’s our word.
- **Lean-Agile** – Capitalize and hyphenate as shown
- **Level** – Treat as a Big Picture artifact. When using it as a modifier—not as a Big Picture element link—then hyphenate. (Example: Team-level objectives should never conflict with the objectives of other levels.)
- **life cycle** – Two words, not hyphenated
- **lifelong** – One word
- **manifesto** – Lowercase when shown alone. (Example: “These concepts are described in the manifesto.”)
- **meet-after** – Hyphenated
- **program execution** – Lowercase
- **PI Planning** – No hyphen. Capitalize on first use. On subsequent uses, PI planning. PPT exception – Always PI Planning in presentation.
- **release train** – Lowercase whenever it does not follow the word *Agile*
- **SAFe Requirements Model** – Capitalize
- **solution(s)** – Lowercase
- **Solution Train** – Capitalize all words in the phrase (that is, *Solution Train* not *Solution train*)
- **spanning palette** – Treat as a Big Picture artifact
- **system builders** – Not systems builders. *System* is singular.
- **System demo** – see [Ceremonies and meetings](#)
- **sprint** – Lowercase, however should generally replace with *iteration* unless context calls specifically for *sprint*
- **team** – Lowercase as a generic noun (that is, not *Agile Teams*), and use the pronoun *they* rather than *it* where possible
- **the Toyota Way** – As shown here. No quotes around Toyota Way, lowercase *the*.

- **timebox, timeboxing, timeboxed** - Lowercase, no hyphen
- **time-to-market** - Hyphenated
- **timeframe** - One word
- **toward** - Not *towards*
- **train** - Lowercase, vs. *Agile Release Train*
- **waterfall** - Lowercase
- **white paper** - Two words, no hyphen. Use title case when it appears in a title (example: A Scaled Agile, Inc. White Paper).

## Ceremonies and meetings

Treat SAFe meetings and ceremonies with the same rules as SAFe Big Picture artifacts: title case on first use, lowercase in subsequent use.

## Appendix F: Approved abbreviations (case sensitive; these show capitalization to use on first mention)

- **ART** - Agile Release Train
- **ATDD** - Acceptance Test-Driven Development
- **BUFD** - Big Up-Front Design
- **BVIR** - Big Visible Information Radiator
- **CapEx** - capital expenses
- **CFD** - Cumulative Flow Diagram
- **CI** - Continuous Integration
- **CoD** - Cost of Delay
- **CoPs** - Communities of Practice
- **DSU** - Daily Stand-up
- **FMEA** - Failure Mode Effects Analysis
- **I&A** - Inspect and Adapt (no spaces)
- **IP** - Innovation and Planning
- **LACE** - Lean-Agile Center of Excellence
- **LPM** - Lean Portfolio Management
- **MBSE** - Model-Based Systems Engineering
- **NFRs** - Nonfunctional Requirements
- **OpEx** - Operating Expenses
- **PI** - Program Increment
- **PO** - Product Owner
- **PMO** - Program Management Office
- **RTE** - Release Train Engineer
- **SAFe** - Scaled Agile Framework
- **STE** - Solution Train Engineer
- **TDD** - Test-Driven Development
- **UX** - User Experience
- **WIP** - Work in Process
- **WSJF** - Weighted Shortest Job First
- **XP** - Extreme Programming

## Abbreviations to avoid

Although these abbreviations may have been used in past books and on the website, current practice is to spell out the whole phrase and don't use the abbreviation:

- **EA:** Enterprise Architect
- **EO:** Epic Owner
- **FW:** firmware
- **HW:** hardware
- **PM:** Product Manager
- **SM:** Scrum Master

### Exceptions:

It's OK to use abbreviations for three-letter roles such as RTE and STE



## Questions?

Have a question that's not addressed in these guidelines?  
Want to report errors or suggest edits?

Get in touch with JB via [email](#) or [Slack](#).