



Leveraging Lean/Agile Elements in SAFe to Solve Immediate Business Challenges

Objective

By using a real-world example,

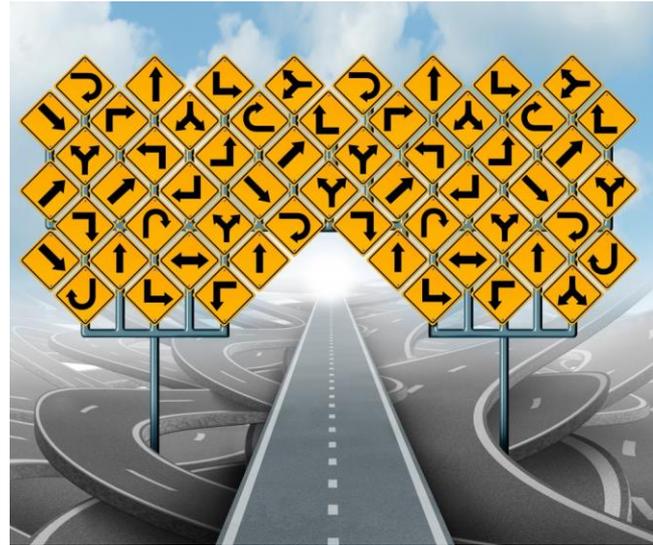
Demonstrate how applying
selected lean/agile principles from SAFe
can produce immediate business benefits

While paving the way for longer-term SAFe adoption

The Business Problem

- Large strategic initiative involving a number of different functions and teams
 - Multiple Engineering teams
 - IT
 - Marketing
 - Sales
 - Back Office
- All teams working on other things
- Scope, priorities ill-defined

How to get organized and get started



How do we...

Make sure the teams understand the objectives?

Organize the Work?

Get commitment from teams on deliverables?

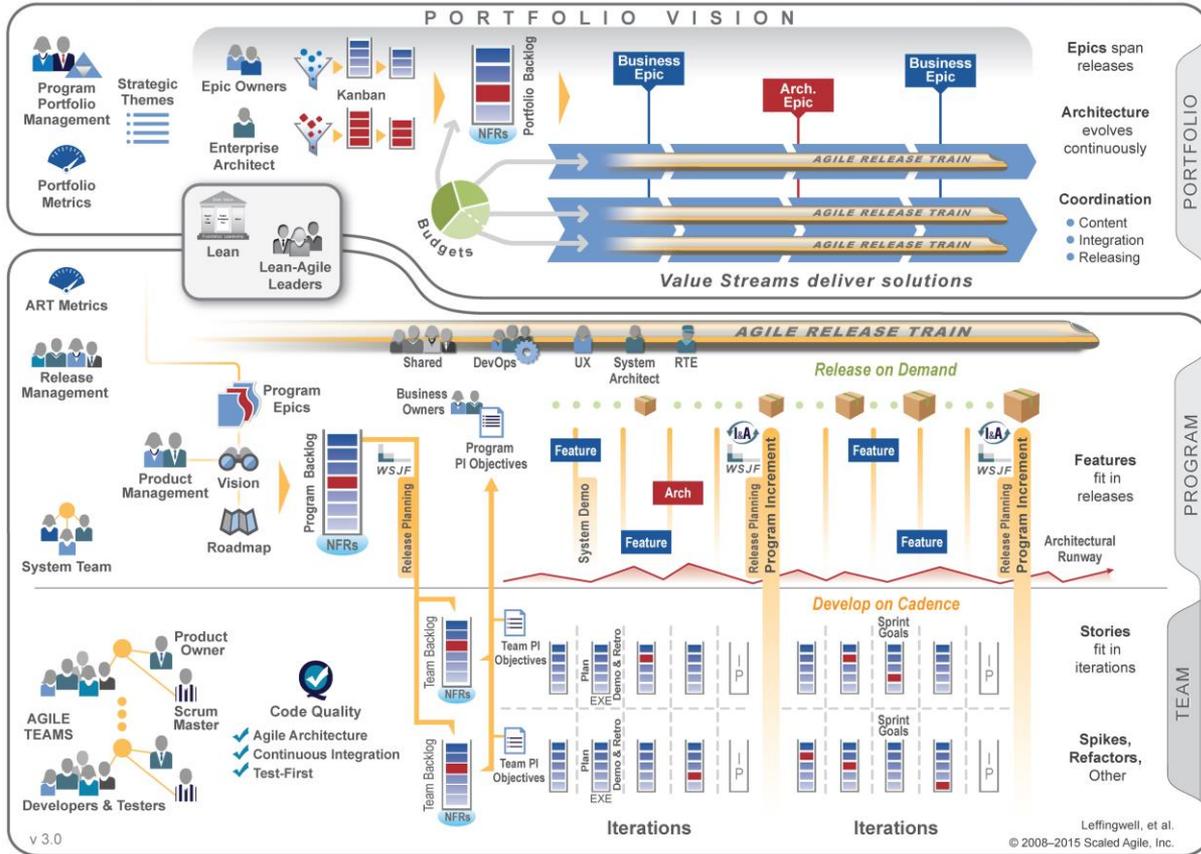
Come up with a delivery plan that makes sense and is achievable?

Measure progress?

Manage dependencies?

Maintain visibility?

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Agile Maturity Challenges

- No formal understanding of/commitment to Agile principles at senior levels
- Not all teams using Agile methods
- Those teams using Agile methods (Scrum primarily)...
 - Some do it better than others
 - Different sprint and release cycles and cadences
- Key roles understaffed or non-existent
 - Product Owners
 - Scrum Masters
 - Release Train Engineers

So we focus on SAFe Principles and a few key features

- Horizontal and Vertical Alignment
- Cadence and Synchronization
- Inspect and Adapt
- Roles
- Backlogs
- Product Development Flow

Apply to this initiative only, rather than the whole enterprise

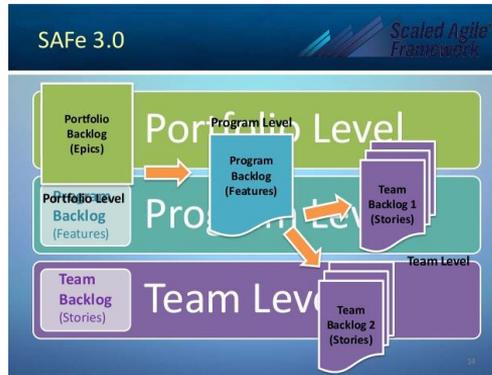
Focus on Portfolio and Program Levels / Teams deliver as they do now

Define/Assign Key Roles

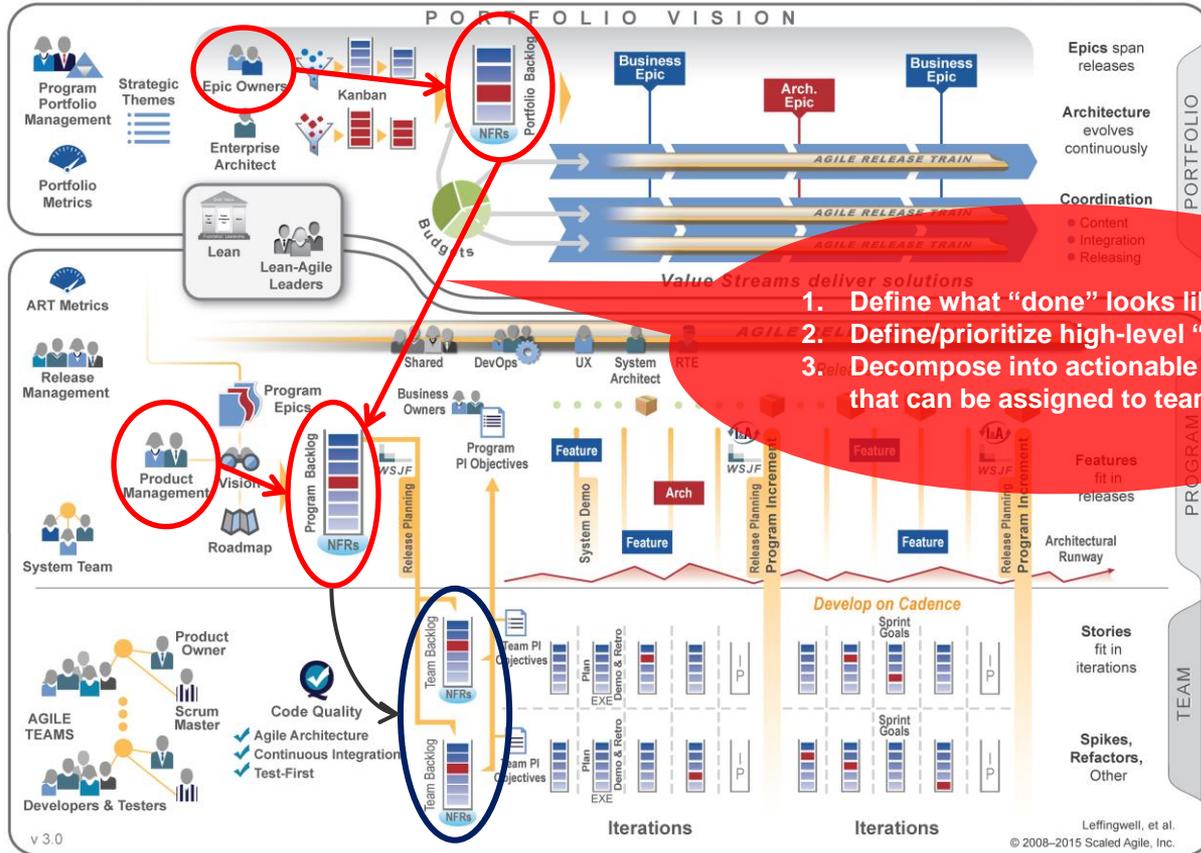
- Epic Owner – Has the responsibility and authority to define overall objectives and create a prioritized backlog of high-level work items.
- Product Management – For each team, has the responsibility and authority to manage and prioritize the backlog for that team.
- Release Train Engineer – Drives the process, facilitates planning, removes obstacles.

Create Portfolio/Program Backlogs

- Owned by Epic Owner / Facilitated by Release Train Engineer
- Prioritized list of high-level outcomes.
- Work with Product Management to organize/elaborate the work (Program Backlog) so the true scope becomes clear and, from that, resource requirements can be estimated.



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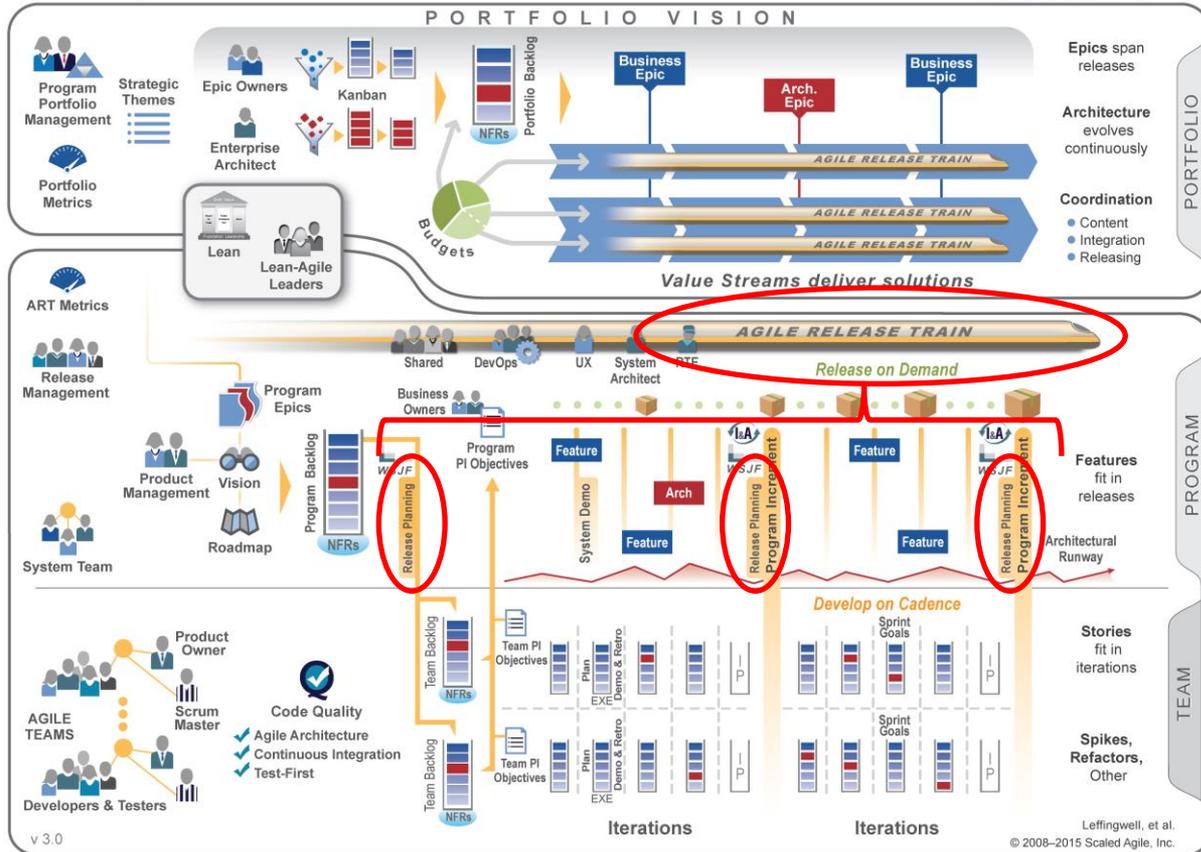
1. Define what "done" looks like
2. Define/prioritize high-level "epics"
3. Decompose into actionable pieces that can be assigned to teams.

Manage as a Release Train

- Team of teams driving to deliver on a value stream.
- Each team may be working on entirely different deliverables.
- Drive awareness and pro-active management of dependencies.



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Release Planning

- Release planning at the beginning of each timeboxed Program Increment.
- Facilitated by the Release Train Engineer
- To the extent possible, all team members (including Product Owners) from all involved teams should be present.
- Teams arrive prepared – general understanding of objectives and capacity
- Follow a formal (timeboxed) agenda.

Teams commit to delivering certain things in that PI based on their capacity

Program Increment

- “Integrate” deliverables with every PI to produce a releasable result that has customer value.
- Demonstrate integrated deliverables and assess.
- Conduct Inspect and Adapt workshop to improve process.
- Refine backlog prior to planning next PI.

Customer value delivered / Management has tangible visibility into progress

So where are we today...

Approval:

- Gained agreement from senior management on the approach.
- Rolling out approach to Product and R&D Managers to ensure that they know what is expected.

Tools and Training:

- Provide Agile/SAFe training in specific areas: RTE training, Epic and Program Backlog training, Release Planning
- Create infrastructure: tools for managing backlogs, program boards for release planning

Prepare Release Train:

- Build out Portfolio and Program Backlogs to clearly define the scope and priorities of the program.
- Kick off release train with first Release Planning meeting.

Takeaways...

Work with what you have:

- Don't be deterred from taking small steps because conditions aren't perfect.
- It's all about continuous improvement.

When in doubt, apply principles:

- Don't get wrapped up in textbook descriptions of Lean/Agile roles, ceremonies, methods, tools, etc.
- Understanding and applying Lean and Agile principles will drive improvements that fit your particular situation

Becoming more Lean/Agile sells itself:

- Achieving small, demonstrable victories will drive acceptance and adoption.
- Adopting something like SAFe is a huge organizational commitment – senior management more likely to understand and embrace when they can observe tangible results.



Thank you