Implementing SAFe: A Roadmap

Effecting change to achieve the business benefits of SAFe

By Dean Leffingwell
Chief Methodologist and Creator of SAFe®
“The success of any kind of social epidemic is heavily dependent on the involvement of people with a particular and rare set of social skills.”

—Malcom Gladwell, The Tipping Point

Two primary reasons to change:

1. **A burning platform**  The company is failing to compete, and the existing way of working is inadequate to achieve a new solution in time.

2. **Proactive leadership**  In the absence of a burning platform, leadership must create the sense of urgency to proactively drive change by taking a stand for a better, future state.
Selling change in three minutes

CURRENT CONTENT

* Our Time To Market is Too Slow  
* Quality/Predictability is Too Low  
* “Morale is Too Low”  
* But “We Have Hired Good People”

CONCLUSION

THERE IS A SYSTEMIC PROBLEM!  
(Sequential, Stage Gated Development Doesn’t Work)

A SOLUTION EMERGES

Lean-Agile Development Has Emerged  
As A Way To Address These Problems Across Industries

SAFE is the Leading Framework  
for Lean-Agile Development at Enterprise Scale.

THE ASK

The First Step Is To Gain Knowledge  
About the Framework & Lean-Agile Development.

WHAT WE NEED FROM YOU

Dedicate Two Days Of Time For You  
And your Managers To Learn About SAFE.

ACTION

Please Fund This Training And Attend; Then Let Those You Have  
Empowered And Educated Determine The Next Steps.

Train Lean-Agile Change Agents

“A strong guiding coalition is always needed. One with the right composition, level of trust, and shared objective.”

—John Kotter
Train Lean-Agile Change Agents

SPCs are knowledgeable change agents. Many are typically required.

Train Executives, Managers, Leaders

“The moment you stop learning is also the one in which you will stop leading.”

— Bill Gates
Train Executives, Managers and Leaders

Only management can change the system.

*It is not enough that management commit themselves to quality and productivity, they must know what it is they must do.*

*Such a responsibility cannot be delegated.*

—W. Edwards Deming

*“...and if you can’t come, send no one”*
—Vignette from *Out of the Crisis*, W. Edwards Deming

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Leading SAFe

- Teaches SAFe Lean-Agile mindset, principles and practices, and the most effective leadership values for managing the new generation of knowledge workers

- Learn how to execute and release value through ARTs, how to build large systems with the SAFe Value Stream level, how to build an Agile portfolio, and how to lead a Lean-Agile transformation at enterprise scale.
Create a Lean-Agile Center of Excellence

“A guiding coalition that operates as an effective team can process more information, more quickly. It can also speed the implementation of new approaches because powerful people are truly informed and committed to key decisions.”

—John Kotter

Create a Lean-Agile Center of Excellence (LACE)

- Communicating the business need, urgency, vision for change and progress
- Developing the implementation plan and metrics
- Identifying value streams, and helping define and launch ARTs
- Providing coaching/training to ART stakeholders and teams
- Promoting continuing Lean-Agile education
- Extending Lean-Agile practices to other areas of the company
Identify Value Streams & ARTs

“Break down barriers between departments.”

—W. Edwards Deming

Identify value stream and ARTs

A Value Stream is a fundamental thinking construct in Lean. Each Value Stream is the sequence of steps used to deliver value to the Customer.

Organizing around the flow of value:

1. Fewer handoffs, faster value delivery
2. Easier to build in quality
3. Built-in alignment between the business and development
4. Optimizing the system as a whole

Result: Faster delivery, higher quality, higher customer satisfaction
Create the Implementation Plan

“The more detailed we made our plans, the longer our cycle times became.”

—Don Reinertsen

Create the implementation plan

Choose the first ART

A three-PI rolling roadmap

See Invitation-based Implementation at: scaledagileframework.com/invitation-based-safe-implementation
Prepare for ART Launch

“Short-term wins help build necessary momentum.”

—John Kotter

Train ART Leaders

- Launching the first ART is crucial: it builds a framework to allow employees to apply the vision to meaningful change.
- Training the leaders helps them create the mindset they need to empower employees for further action.
- Training gives stakeholders the skills and motivation they need to change the organization.
- The ART as a team of teams removes silos that inhibit flow.
Set the date: forcing functions drive change

A forcing function is a commitment that forces a sequence of actions to happen. Use it to start your train.

- By scheduling the PI Planning meeting, you will create the timebox for the preparation.
- This will minimize work expansion. Not everything can (or needs to) be perfect.
- Assure people that the Inspect & Adapt workshop creates a closed-loop system so impediments are visible and addressed ASAP.

After Leading SAFe training, this leadership team launched their first Agile Release Train in 10 days. Photo courtesy of SEI Global Wealth Services

Define the ART

Agile Release Train Canvas: [ART Name]

<table>
<thead>
<tr>
<th>Values statement</th>
<th>Business Owners</th>
<th>People and locations</th>
</tr>
</thead>
<tbody>
<tr>
<td>FOR ...</td>
<td>Number of practitioners and geographic locations</td>
<td></td>
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<tr>
<td>WHO ...</td>
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<td>THE ...</td>
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<td>UNLIKE ...</td>
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<tr>
<td>our consumer ...</td>
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</table>

<table>
<thead>
<tr>
<th>Key customers</th>
<th>Principal roles</th>
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<tbody>
<tr>
<td>Product Manager</td>
<td></td>
</tr>
<tr>
<td>RTE</td>
<td></td>
</tr>
<tr>
<td>Systems Architect</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Success measures</th>
<th>Team design strategy</th>
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</thead>
<tbody>
<tr>
<td>Outline of teams and team responsibilities, system team, features, components</td>
<td></td>
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</tbody>
</table>

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<thead>
<tr>
<th>Solution</th>
<th>Technical assets</th>
<th>Other stakeholders</th>
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</thead>
<tbody>
<tr>
<td>Systems, products, services developed and maintained by the ART</td>
<td>Development tools and environment</td>
<td></td>
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Development Value Stream

- ART structure in development value stream, including steps

Operational Value Stream: supported

- Steps supported in operational value stream

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Assess and evolve readiness

Form the Agile Teams

Prepare the backlog

Train PMs, POs and SMs

Train Teams & Launch ART

“We often don’t think through carefully enough what new behavior, skills, and attitudes will be needed when major changes are initiated.

As a result, we don’t recognize the kind and amount of training that will be required to help people learn those new behaviors, skills, and attitudes.

—John Kotter
Train teams and launch trains

- Prepare
  - Training SAFe for Teams
    - Train everyone at the same time
    - Same instructor, same method
    - Most cost effective

- Go. SAFe. Now.
  - PI Planning
    - Align teams to common objectives
    - Commitment
    - Continue training during planning

- Finalize
  - Workshops (tool training, other role orientation, etc.)
    - Orientation for specialty roles
    - Open spaces
    - Tool training for teams

Synchronizes with PI Planning

- Future product development tasks can’t be pre-determined. Distribute planning and control to those who can understand and react to the end results. — Michael Kennedy, Product Development for the Lean Enterprise

- All stakeholders face-to-face (but typically multiple locations)
- Management sets the mission, with minimum possible constraints
- Requirements and design emerge
- Important stakeholder decisions are accelerated
- Teams create—and take responsibility for—plans
Coach ART Execution

“When you let up before the job is done, critical momentum can be lost and regression may follow.”

—John Kotter

Coaching ART execution

- Help teams plan, execute, review and retrospect the first several iterations of the PI
- Manage WIP and improve flow
- Keep the focus on delivering value vs. simply completing tasks
- Coach new Scrum Masters and Product Owners
- Continuously Improve with Inspect & Adapt
Launch More ARTs and Value Streams

“Consolidate gains and produce more change.”

—John Kotter
The SAFe implementation railway

“Anchor new approaches in the culture.”

—John Kotter
## Extend to the portfolio

Allocate and assure funding to strategy

Close the loop on funding and program execution, measures and reporting, necessary compliance

Drive, assist, or support program execution

### From traditional to Lean-Agile mindsets

<table>
<thead>
<tr>
<th>From traditional approach</th>
<th>To Lean-Agile approach</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1 Centralized control</td>
<td>Decentralized decision-making</td>
</tr>
<tr>
<td>#2 Project overload</td>
<td>Demand management; continuous value flow</td>
</tr>
<tr>
<td>#3 Detailed project plans</td>
<td>Lightweight, epic-only business cases</td>
</tr>
<tr>
<td>#4 Centralized annual planning</td>
<td>Decentralized, rolling-wave planning</td>
</tr>
<tr>
<td>#5 Work breakdown structure</td>
<td>Agile estimating and planning</td>
</tr>
<tr>
<td>#6 Project-based funding and control</td>
<td>Lean-Agile budgeting and self-managing Agile Release Trains</td>
</tr>
<tr>
<td>#7 Waterfall milestones</td>
<td>Objective, fact-based measures and milestones</td>
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Sustain and Improve

“Excellent firms don’t believe in excellence—only in constant improvement and constant change.”

—Tom Peters
SAFe House of Lean

**VALUE**
- Respect for people and culture
- Flow
- Innovation
- Relentless improvement

**LEADERSHIP**

Leadership and relentless improvement are inseparable

“There is a constant sense of danger.” —Toyota

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Sustain and improve

**Measure success**
- Improve ART results
- Servant leadership
- Reduce time to market with value stream mapping

**Agile HR**
- Improve Team agility

**DevOps and Agile technical practices**

**Focus on Essential SAFe**

Continuously improve