



The Fast Track Guide to SAFe Implementation



John Blanco
Enterprise Agile Transformation Leader

Introduction

Bringing a scalable Agile framework into an organization is never a one-size-fits-all proposition. A “cookie cutter” approach to implementing an Agile framework is overwhelmed by businesses in different verticals with different objectives and cultures.

SAFe is no different. It offers some of the best practices for solving many of the problems we are faced with, including:

- Getting products into the hands of customers faster
- Raising the level of build quality
- Establishing a strong base for cross-team and system collaboration
- Providing transparency so that goals can be successfully aligned and measured for feasibility, capacity, and the capabilities of our organizations
- Helping us maintain a strong focus on the economics surrounding technology development

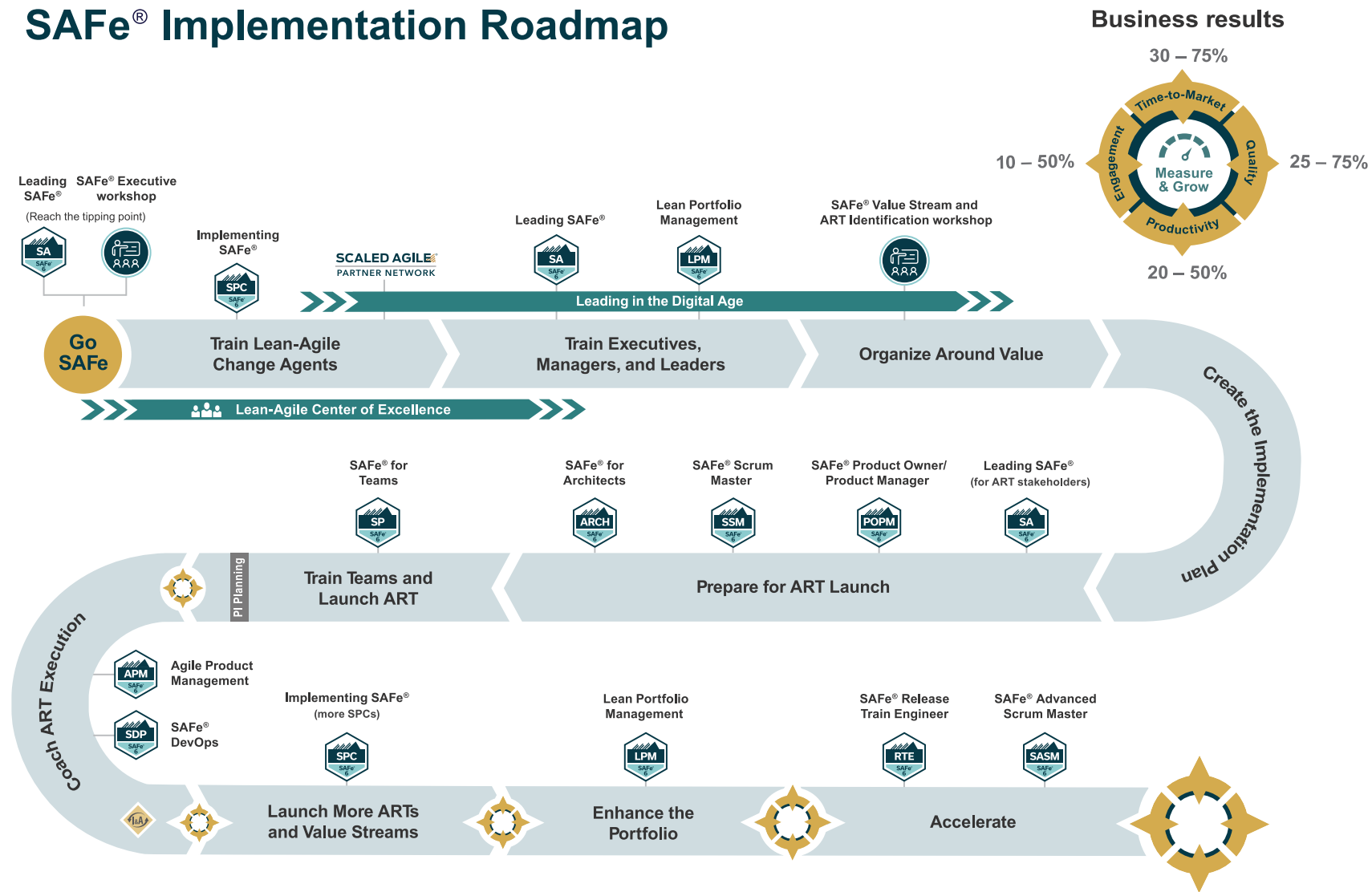
This document does not sell you on SAFe. This document simply helps people get started quickly and gain traction.

This isn't a replacement for the implementation guide published by SAFe. That extensive document remains the most authoritative step-by-step guide you can have.

The **Fast Track Guide** helps you set realistic goals for launching a SAFe implementation. It achieves the same things that a full SAFe implementation achieves but in a lighter and more accelerated manner. This guide is a way to start the ball rolling. And the way is practical, sensitive to every implementer's goals, and will get your first Agile Release Train up and running – quickly and efficiently.

Let's start by taking a look at what SAFe provides as its official implementation roadmap.

SAFe® Implementation Roadmap



SCALED AGILE
© Scaled Agile, Inc.

As you can see, there are several different stages or steps we pass through to reach our goal:

- Train Lean-Agile change agents (core team)
- Train executives, managers, and leaders
- Identify value streams and ARTs
- Create an implementation plan
- Prepare for our ART launch
- Train teams and launch ART
- Coach ART execution
- Launch more ARTs and value streams
- Extend the portfolio
- Accelerate

Although there might seem to be a lot, all these activities are necessary. All, when done as proposed, will bring value and help establish a solid foundation that not only kick-starts your SAFe transformation, but also helps to build your Agile culture from the ground up.

These steps very closely follow John Kotter's eight steps of transformation. In fact, SAFe acknowledges Kotter numerous times in their material. I've attempted to remain true to the SAFe method but have consolidated many of the activities in order to gain SAFe "traction" sooner.

This consolidation helps lay down the foundation of the SAFe process while readying us to expand our goals over time.

Fast Track Roadmap



1 The Tipping Point

Establish a sense of urgency

Conceptually, every SAFe implementation must start with this step. Transformations like this do not come cheap. They cost time, resources, and money. Show others that the entire organization is undertaking this venture with eyes wide open, armed with a valid business purpose.

At some point, every company reaches a **tipping point**. An event, or series of events, that require a re-evaluation of business operations. SAFe looks at some common catalysts:

- **Burning platform.** A product that is failing in the market or a threat from a competitor.
- **Proactive leadership.** Shrewd business leaders stay ahead of the curve by embracing change and maintaining a competitive advantage.

Actions:

Whether due to an external threat or just being proactive, it's critical that management convey the reasons for entering a transformation.

- Do a strengths, weaknesses, opportunities, and threats (**SWOT**) analysis. Look at the organization with a critical eye to identify behaviors to change, risks to mitigate, and threats to reconcile or avoid.
- **Kick-start presentation.** Hold an intro to Agile with SAFe briefing and present the problems you've unearthed. Some may be obvious, some surprising. But it's important that once you have some good data, your discoveries are shared with leadership. Establishing and gaining consensus on where to act is the first step toward taking action.

There has to be a purpose for "going" Agile. What are we trying to fix? Sharing findings will motivate people and create a valid problem proposition and baseline for measuring the success of your Agile transformation.

A SWOT analysis case study

A SWOT analysis identifies three major problems:

- Failure to deliver on commitments
- Difficulty scoping and sizing work
- Lack of transparency or ability to accurately visualize and report tactical progress

I learned this through a SWOT after diving into four key areas:

Productivity

- **How much work can a team accomplish over time based on either the number of items or the number of points accepted?** High productivity means more business value has been delivered or more technical debt has been reduced.
- **Do we have the capability and capacity to get things done?**

Predictability

- **How consistent is a team at producing work over time?** High predictability means stakeholders can confidently plan when work will be delivered. This is a clear indication that teams are better at estimating their work and flowing consistently-sized increments of value.
- **Can we deliver to pre-ordained schedules?**
- **Do our customers have confidence that we can meet our commitments repeatably?**

Responsiveness

- **Do teams have the ability to deliver functionality soon after it's requested?** High responsiveness can dramatically impact the ability of businesses to react to changing markets and customer needs. Responsiveness is core to Agile.
- **Can we pivot when needed?** How are market changes handled, if they may impact what we are building? Are they handled reliably and effectively (e.g., disruptive vs destructive)?

Quality

- **How disciplined are we in preventing defects and how quickly can we resolve any that occur?** Sustainable delivery of value requires consistent levels of high quality for all work delivered to production.
- **Are the products we build and services we provide of the highest quality?** When operational or product defects get discovered, do we have the resilience and operational efficiencies to react efficiently?

2 Create the Coalition

Change agents to make it happen

While management may recognize that problems exist (or may simply have a healthy sense of danger), they often lack the know-how needed to drive what must be done or the skills that facilitate in-the-trench localized decision making. It's important to form a team of visionary leaders who can:

- **Drive the transformation vision.** Organizations need passionate people, unafraid of adversity, who are accomplished and experienced at removing impediments.
- **Act as change agents.** Knowing what to do is one thing, but making things happen is the true indicator of a change agent.
- **Claim organizational credibility.** Organizations need people who are seen as influential players in the company. Their opinions are acknowledged and respected, and they are not afraid to be visible and held under a spotlight when needed.

Often these individuals may come from trusted consulting partners, internal business and technology leaders, portfolio/program/project managers, architects, analysts, and process leads.

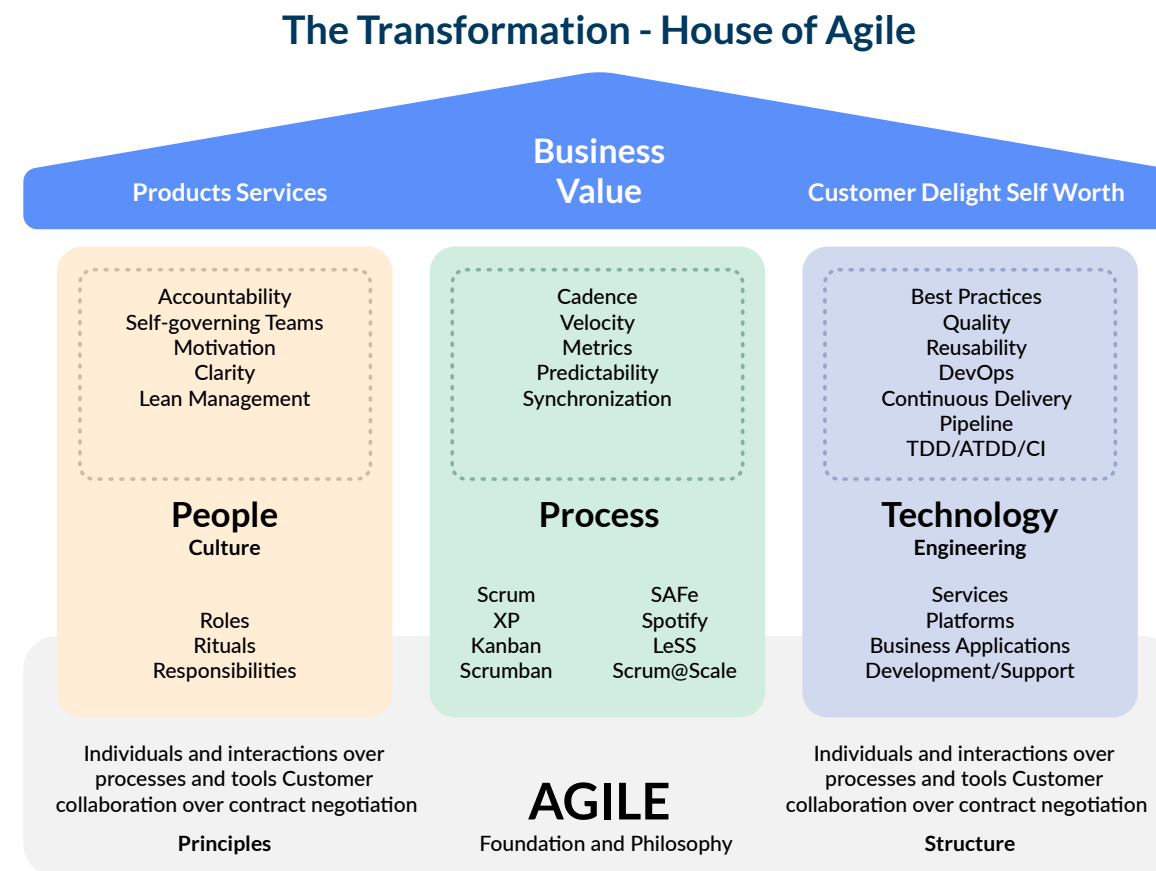
Actions:

Build a potent Coalition and Transformation core team. Start by assembling and training the right set of people. This can be done by:

- Hiring or training SPCs (SAFe Program Consultants) and strategically positioning them as change agent/coaches.
- Training executives and managers in the methods they will need to support the transformation (normally through a series of Agile introductory courses, **SAFe Executive Overview** or **Leading SAFe**.)
- Creating a **Lean-Agile Center of Excellence (LACE)** or **Agile Management Office (AMO)** to drive change uniformly and consistently across the organization. This group is chartered to govern and sustain the principles of the transformation moving forward.

Establishing a LACE team is critical, but can often be done as an initiative coming out of the organization's AMO or even PMO. The charter of LACE includes communicating, developing, and managing the transformation plan; establishing metrics, coaching, and training; assisting in value stream mapping and analysis; facilitating key SAFe events (PI planning, I&As); benchmarking and connecting with external Agile communities; promoting Lean-Agile principles; extending Agile beyond technology and into the business; and helping the organization improve.

In some organizations, where emergent technologies seriously impact business roadmaps and solutions, extending your LACE invitation to include many of your key architects (enterprise architects) is a wise decision. Aligning architecture to the transformation will help solidify collaborative channels between your business partners and technology camps early on.



The LACE, or any similarly minded coalition, will help crystalize and kick-start the formation of the much-needed portfolio level LPM (Lean Portfolio Management) process. This is crucial as we enter the mode of articulating and analyzing our value streams and prioritizing our work.

Don't underestimate the need to train your management at this point. Leading SAFe and the SAFe Executive Workshop, along with basic Agile overviews, do a great job teaching the supportive attributes we wish to see in leaders.

3 Create the Guiding Vision

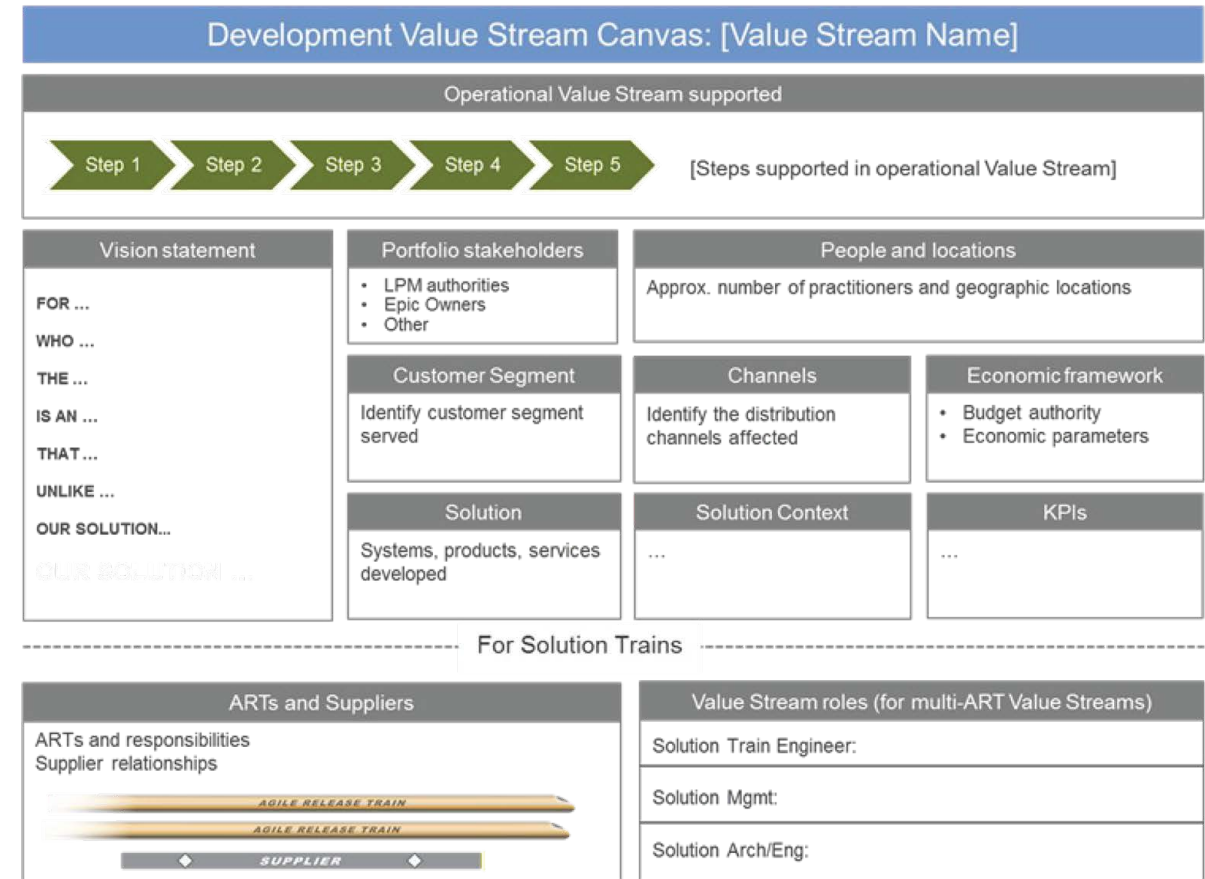
Arm your CAs with a guiding mission

Building the coalition and setting a level of purpose for your LACE, not to mention the company, is critical to the transformation. Write it as a statement of intent. Don't get bogged down in too much detail. A bit of wiggle-room is helpful.

With a vision in place, and widely communicated, build momentum by broadcasting intent and gaining the necessary approvals to move forward. I have always found that this is a good place to do some value stream identification/mapping, product in-visioning (possibly applying Jeff Patton's user story mapping), or even a SWOT analysis.

Value stream mapping and identification will help us set up our Agile release trains (ARTs) later. If you choose to do some value stream identification to visualize your operational and development value streams (triggers and steps), use the template SAFe provides on its site. Operational value streams are often easier to grasp because they can almost always be identified through the produced products and services – though some large companies have much more complicated value streams to map.

This also may be an entry point for the SAFe ritual – **value stream workshop**. If so, hold one.



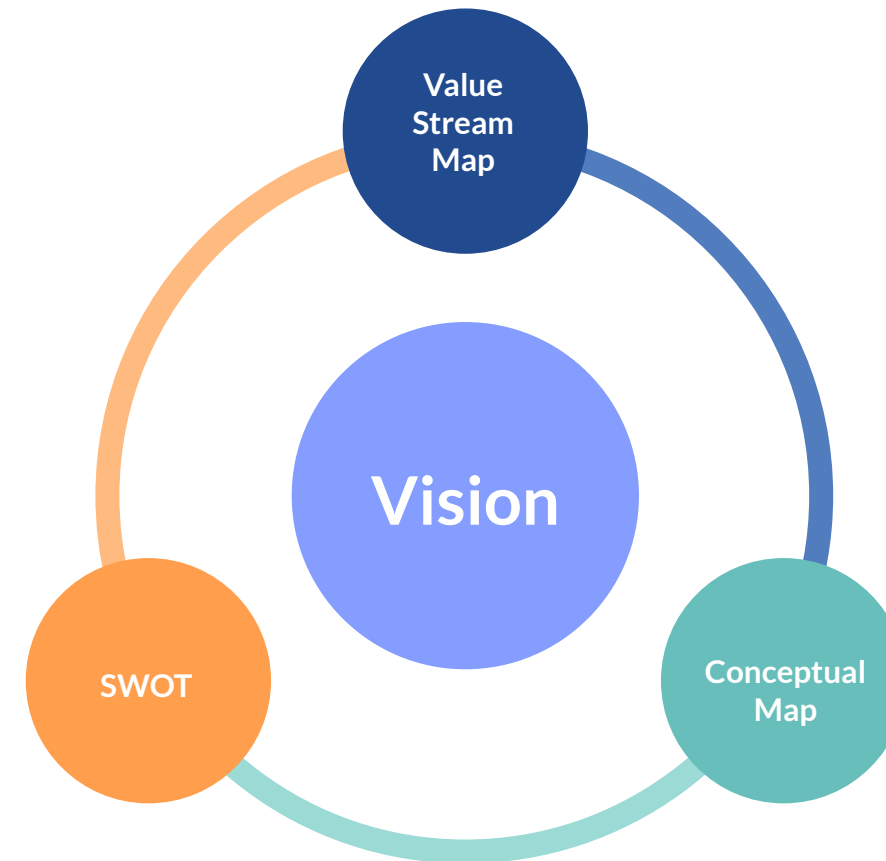
© Scaled Agile, Inc.

Actions:

To initiate the creation of your guiding vision, identify, map, and deconstruct value streams. Sometimes, to help a team envision their product(s), create a conceptual map (e.g., Jeff Patton’s user story mapping).

If these techniques are out of reach or unfamiliar, just leverage the SWOT you created at the beginning.

Either way, this preliminary activity will establish the groundwork and basis for our creation of ARTs (program sized groupings to organize our component and feature teams).



4 Communicate and Begin Training

Start the transformation by enabling your leaders

The creation of the LACE, in step two, should ensure that the transformation has the necessary traction it requires for the long haul. Having a dedicated team helps keep things on track and forestalls distraction from conflicting agendas or cultural pushback. In the beginning, it doesn't have to be a large team; often, it's just the certified SAFe® program consultants (SPC) and two to three invested sponsors driving the transformation.

This is also a good point to begin readying executives and other managers to the changes about to happen. Management must fully grasp their purpose and responsibility in the transformation so they can be true leaders. This also means selecting key activists responsible for helping build the actual teams and ARTs.

Actions:

Begin with some foundational training for your organization. Much of this training may require bringing in external trainers if you don't already have an in-house regiment of SPCs or Agile coaches. A Leading SAFe and SAFe Executive Workshop is the perfect curriculum for setting the tone and forming the necessary understanding for management (e.g., executives, line managers, finance people, and product managers). These workshops teach the basics of Lean thinking, the portfolio and program levels of SAFe — which are all necessary if we wish to be successful.

Depending on the Agile maturity of the organization, you may also need to offer some preparatory training courses. Training in SAFe for the Agile uninitiated can be overwhelming. Training options to include:

- Agile 101 (Introduction to basic Agile concepts)
- Scrum master training
- Product owner/manager training
- Architecture and DevOps training
- Lean portfolio management
- Prioritization: weighted shortest job first (WSJF) training

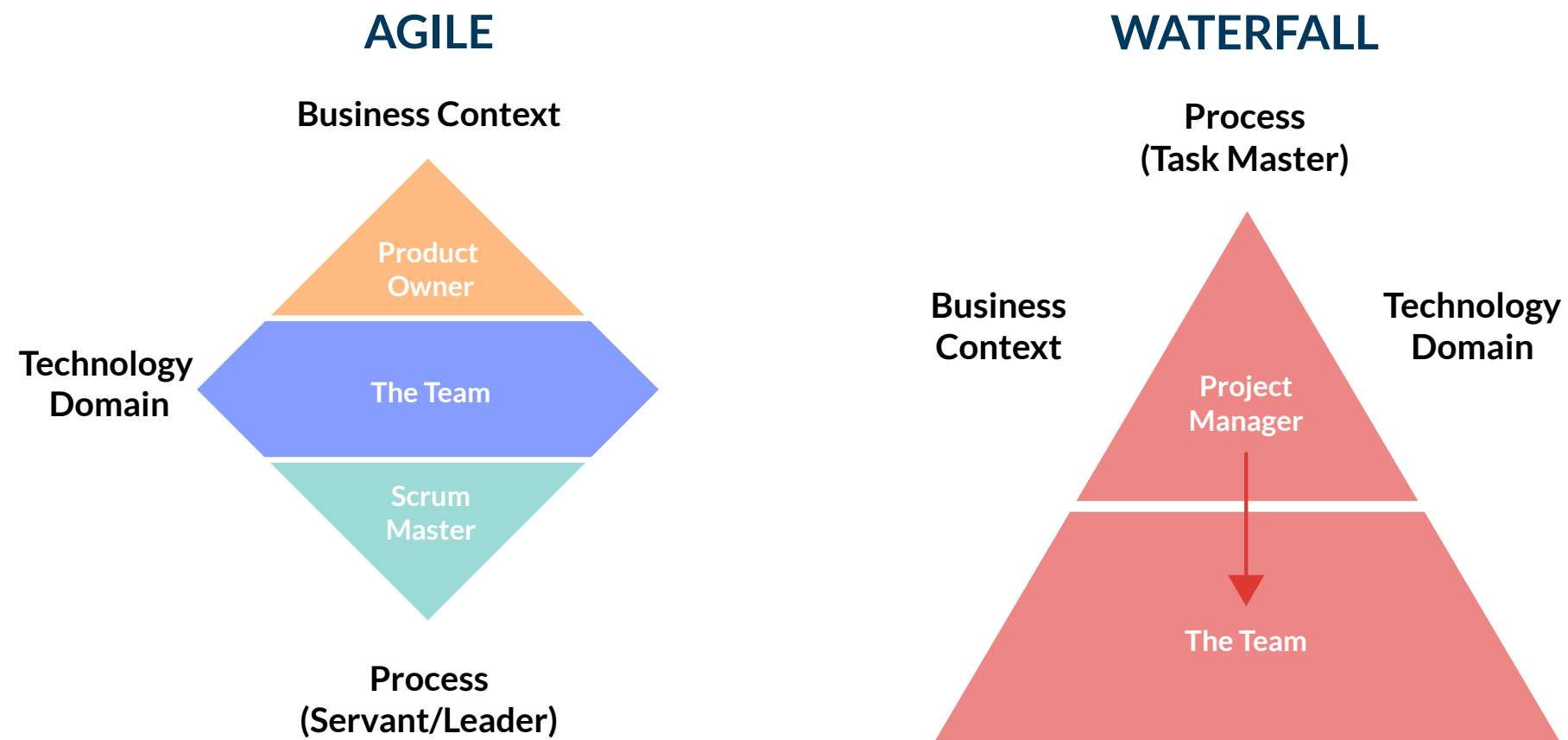
5 Empower Others

Organize around portfolios, programs, and teams

With the vision and leadership in place, you must now create teams and empower the people who will be required to do the work.

This means building backlogs and assembling people. When assembling the ART, consider the following: leadership support, clarity on product and solution vision, levels of collaboration, and taking on a worthy challenge or effort.

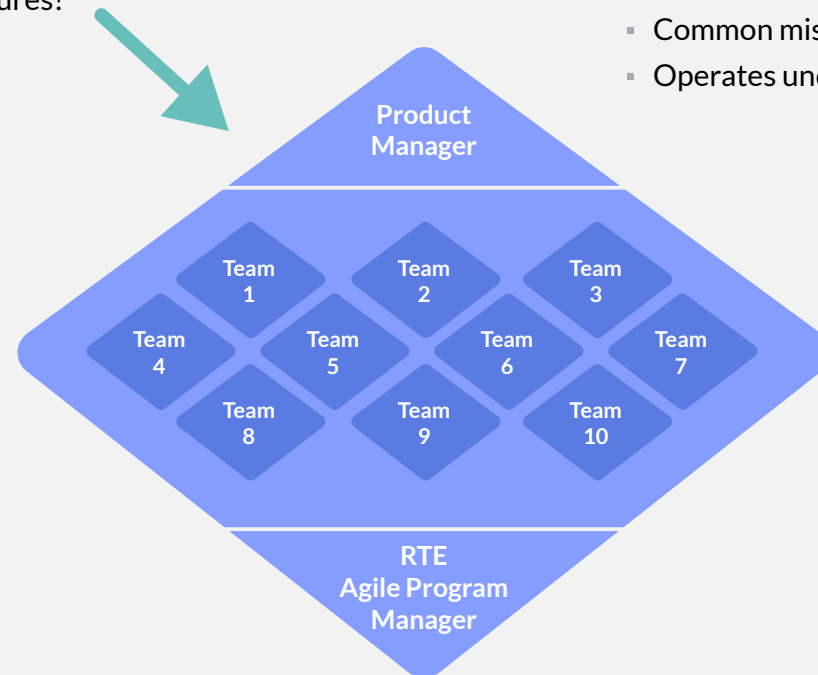
In theory, we are moving our project management thinking further away from traditional methods:



And into a totally new Scaled Agile paradigm:

Scaling Agile - Agile Release Trains (ARTs)

How do we manage multiple teams delivering to a common set of Features?



- Virtual organization of 5-12 teams
- Operates on a PI timebox (~10 weeks)
- All teams on synchronized iterations
- Common mission with single Program backlog
- Operates under architectural & UX guidance

Actions:

Train your teams. This is the first step in truly empowering your people. **SAFe (Scrum for teams)** is perfect for this. This training helps set up the foundation of SAFe for everyone. For the highly motivated manager who wishes to get a deeper understanding of how their people will be working with SAFe, it provides a wealth of knowledge and acts as a tremendous additive. It can create a wonderful synergy between teams and management.

By creating an
Agile Release
Train (ART)

6 Pilot Launch

Assess value streams, delivery pipelines, and plan

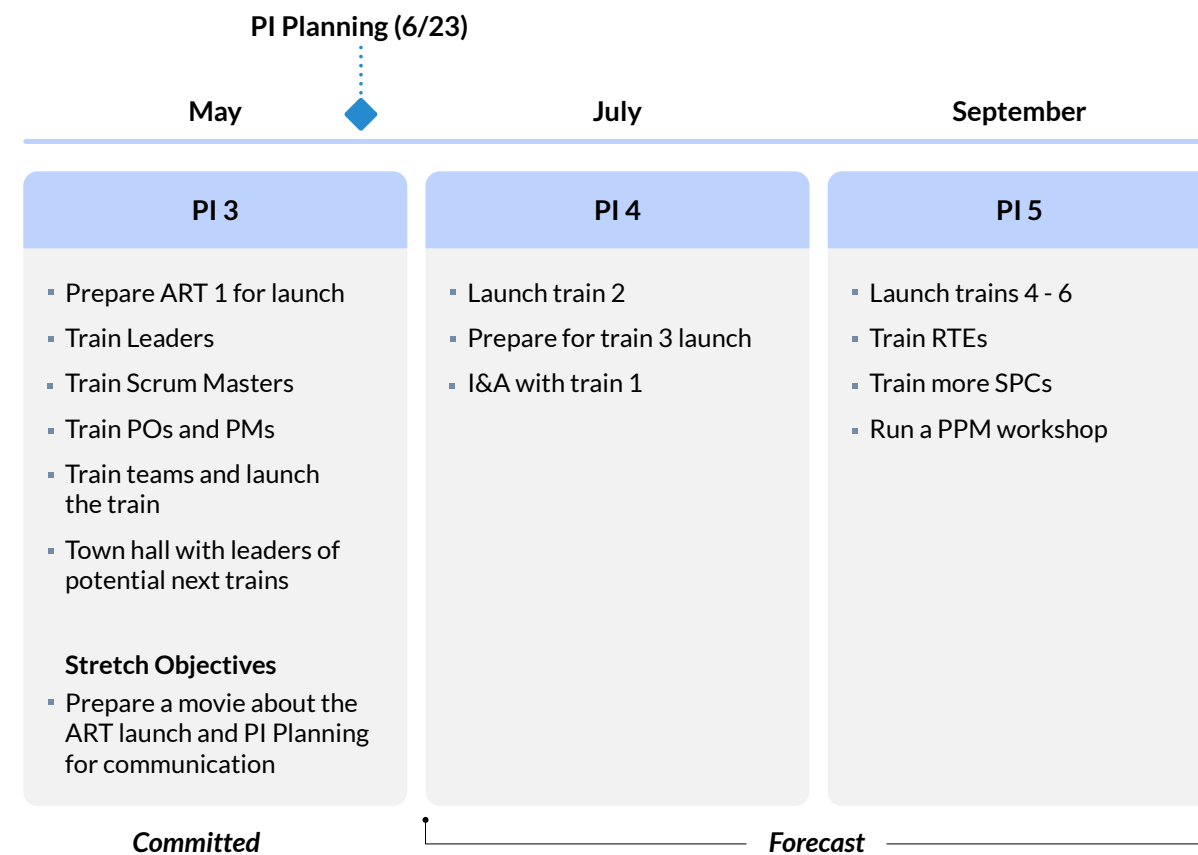
Having come this far with an understanding of our value streams, and having assembled a cast of characters to empower our ART, we are now at a pivotal point in the transformation. Our immediate goal is to start things moving and gain visible short-term wins. Pulling together a high-level launch plan will help with this. It will identify key release dates and milestones, but keep it light because the actual stabilizing and coordination of activities will be covered during the PI planning event. Include the following in your launch plan:

- High-level scope of the ART
- Launch date for the PI
- Established and accepted PI cadence
- Training schedule for all ART leaders (RTEs, product managers, scrum masters, product owners, etc.)
- Rosters for the ART teams
- ART launch readiness checklist for assessing launch readiness
- Milestones for building the program backlog (features, WSJF prioritization, etc.)
- Training requirements
- Scheduling of key ART events such as PI planning, system demos, Scrum of Scrums, PO syncs and end of PI – Inspect & Adapt

When planning for our initial ART launch, it will be important to prepare each team for what is expected in the upcoming PI planning session and, later on, in execution of the PI.

Knowledge of the many events and rituals are usually covered in the SAFe for Teams training, but it's useful to facilitate a practice PI planning session — a PI planning mock run. Rather than assemble all participants in a room for two-full days, just pick out the key players from each team, their managers, interested parties, and anyone else who wishes, or is needed, to experience PI planning.

It's important to publish, and share, your plan. Don't be afraid of not getting it perfect the first time. Allow for learning and change as you go.



Agile Transformation Blueprint

		PI 1										PI 2									
		8/27					11/2					11/5					1/11				
		Weeks																			
Epics	Features and Activites	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10	W11	W12	W13	W14	W15	W16	W17	W18	W19	W20
People & Things <i>Discovery and Coalition</i>	Create Baseline & Strategy	X	X	X	X																
	Facilitate Key Stakeholder Meetings	X	X	X	X																
	SWOT - Product Management				X	X															
	SWOT - Engineering				X	X															
	Create Finance Alignment																				
	Document initial KPIs																				
	Create LACE (APMO) Org					X															
Tools <i>Review tool usage and setups</i>	ALM Walkthroughs		X	X																	
	Oter Tools Review																				
	Review PPM tools: SmartSheet, Power BI																				
	SAFe configuration (ALM)																				
	Assess Plugins (WSJF, Portfolio for JIRA, etc.)																				
Methodologies <i>Scrum and SAFe Assessment</i>	Review SAFe Implementation			X																	
	Assess Product Managers																				
	Assess Product Owners																				
	Assess ScrumMasters																				
	Meet and assess other Key Team Roles (RTE, EA, etc.)																				
Execution <i>Train, Launch, Measure, Optimize</i>	Identify ART (and Teams)																				
	Identify ART Roles																				
	Basic Training: Scrum for Teams, POPM, ASM			X																	
	Leading SAFe Training (Agile Intro for Execs)																				
	PI Preparation																				
	Mock Run and I&A																				
	PI Planning																				
	Execute PI 1																				
	Product EnVisioning																				
	Value Stream Workshop																				
Begin QUAD Reporting																					
Advanced Practices (Training)																					

Actions:

- **Create a plan.** There are many techniques and tools to help formalize a preliminary plan. Often when a company is moving from a traditional waterfall process, having a Gantt style doc appeases early concerns. But don't get trapped into a hard-set plan. Agile is not about rigid static plans. It's about loose plans that can easily be adjusted over time. Starting off with something that helps identify some of our key milestones is good; committing to "paper" or delivering a time-bound artifact is not.

Starting a product backlog with traditional business requirements documents (BRDs) is comfortable in the early stages to pass around, review, and sign-off on requirements. But once the real backlog is created with epics, features, and stories, the BRD will get removed. *The backlog becomes the focus.*

- **Facilitate a mock run.** It should be no more than four hours and try to simulate all the key events of a full PI planning session. This helps prepare and motivate people for the real thing. Artifacts like the program vision, program board, PI calendar, dependency charts, PI objectives, and others are created so nothing goes to waste.
- **Train up the Release Train Engineer (RTE) and product manager(s).** In many organizations, these two important roles have never existed and are not automatically found in other Agile techniques. However, if ARTs are expected to run smoothly, it is critical to have the right people trained in these roles and prepared to take on some significant responsibilities. ARTs may come to a crashing halt if these functions are lacking.

7 Execute

Inspect and adapt, coach and learn

Causing change within a culture is not trivial. We must change people's behaviors, roles, and expectations. SAFe for Teams training is perfect for starting this grassroots effort with the people directly responsible for delivering our products and services, and who will, in effect, be active members of ART development teams. Training is not only important to those new to Agile or Scrum, but also to those with the most experience.

Many of the scaling techniques SAFe employs are not naturally found in Agile or Scrum, so hosting a SAFe for Teams training as a big room event accomplishes the following:

- It allows the teams to fully form
- It enables teams to collectively engage in the full learning experience
- It allows us to share knowledge around concepts like epics, capabilities, features, stories, etc.
- And last but not least, each team begins to form its own identity

The start and end of every Program Increment (PI) has the most critical impact in the evolution of an ART — even on the transformation itself. Preparing for, and then hosting, the PI planning event allows us to carefully synergize with this new style of solutioning, becoming the cornerstone of PI execution.

Actions:

Pre-PI planning. This planning is necessary so that our PI planning event has the right information, tools, and people. The RTE will need to work alongside the product manager(s) to assist in:

- Collecting the necessary briefing presentations
- Gathering the necessary architectural, systems, and UX/UI presentations
- Coaching and preparing the necessary speakers for the event
- Ensuring that features have been properly vetted and prioritized before they are presented (which aids in avoiding surprises at the PI planning session proper).

These activities are the foundation of initial PI planning. Now let's look at how we move from one PI to the next:

Mid-PI review. A mid-PI review occurs around the start of sprint three. This works whether you are doing five-sprint (10-week) or six-sprint (12-week) PIs. These events include all scrum masters, product owners, product manager(s), technical leads, QA leads, key architects, and system team representatives. It is facilitated by the RTE (or SPC). The agenda of this meeting is:

- Review the current (in-flight) PI features to determine what our expectations for delivery are. This means, as an ART, discuss and mark each of the features in our current PI as:
 - On track
 - In jeopardy
 - Technical debt (candidate for movement into the next PI or split)
- Review all proposed features for the next PI

This event openly acknowledges the state of committed delivery, makes adjustments, and jointly understands the feature-load planned for the upcoming PI. This 2–4-hour meeting enables participants to better prepare the proposed features (e.g., harden acceptance criteria, size, determine distribution across teams, and even help gauge whether the ART needs to add or subtract teams if necessary).

The mid-PI review also provides time to re-examine present PI objectives to determine if the value expected in the current PI will achieve its goal(s) or need to be moved/split into the upcoming PI.

The final two outcomes of pre-planning are:

- Clarifying the features so that they can be properly prioritized (e.g., weighted shortest job first (WSJF)).
- Pre-release features and enablers poised for the upcoming PI to the teams so that important planning preparations can occur prior to the event. For example: conversations with product managers/owners and SMEs; collaborations with key suppliers and vendors; technical clarification via technical experts and architects; and decisions on acceptable scope. Having too many open questions at PI planning slows things down and can jeopardize commitments and the confidence vote.

PI planning. This is a common two-day ritual normally occurring during the last week of sprint five (if you are using five-sprint PIs). During the PI planning session, we allow ourselves time to debate issues that often remain hidden in traditional project methods. Even the forced time-box of the event sets the stage for how to address planned work and allow commitments to be bound contractually to value stream partners.

Inspect & Adapt (I&A). At the PI close, you see the entire solution (or an increment of the solution) fully integrated and demoed. This super-charged retrospective allows team contributors to be part of the transformation improvement process. Accomplish this by:

- Surveying the entire ART and having members answer questions on how they believe the ART performed. Filter people’s thinking across the domains of productivity, predictability, responsiveness, and quality (PPRQ). This information is the foundation of improvement workshops during I&A.
- Starting the I&A with a full solution integration demo if one hasn’t already occurred.
- Reviewing survey findings categorized through the domains mentioned above.

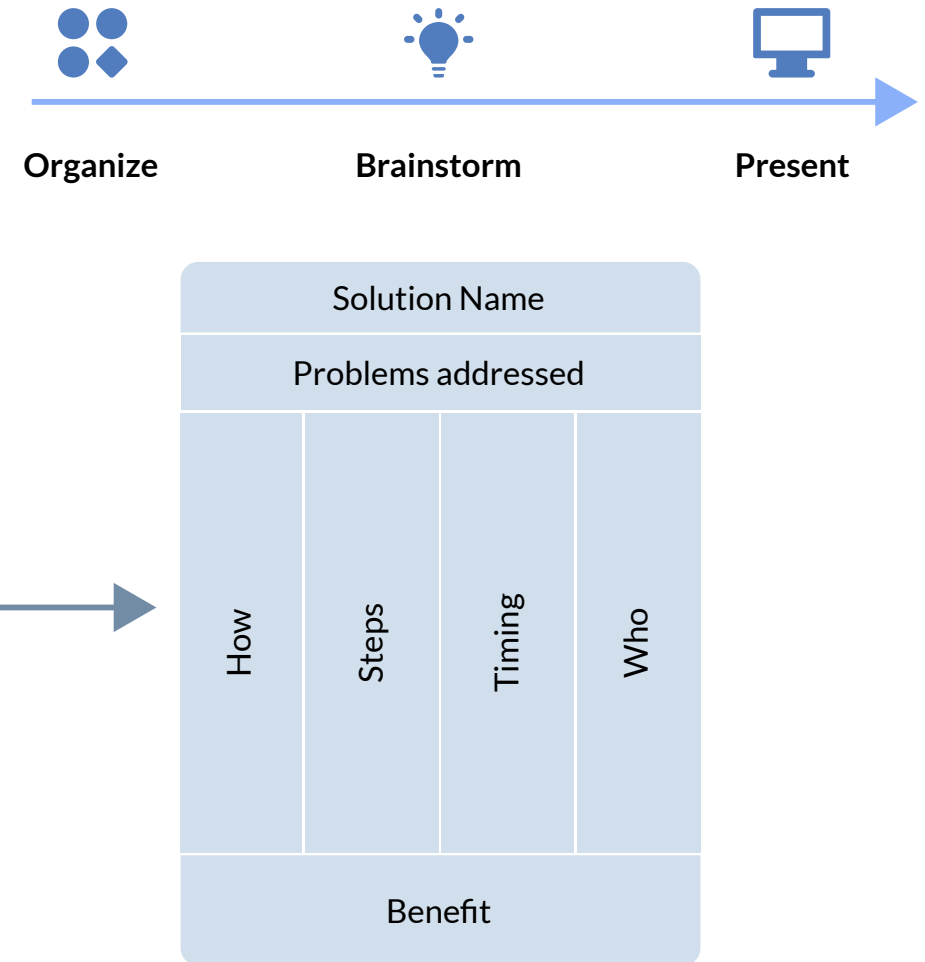
I&A Survey Results

Domain	Comment
Quality	<ul style="list-style-type: none"> • Off train needs a better way for traceability, ownership of dependencies, etc. • Need to have a better sense of which teams have dependencies on other teams - before PI 2 begins. • Understanding of features - Ability for teams review the top 10-15 features and ask clarifying questions prior to PI Planning. • Improvement with PI Planning - more time for dependency and risk discussions. • This first PI was a learning experience. The more we plan and communicate ahead of time - the smoother it will go. Allow teams time to digest and think about things. • Need to improve inclusion and engagement of ART during key PI events. Many times events seemed unorganized. • The Essential SAFe framework seems to limit the type of work normally done - possibly causing friction and waste. • Need to enable our key stake holders to participate, contribute and support. • Need better clarity and commitment on a path.
Predictability	<ul style="list-style-type: none"> • Ensure teams clearly understand all features and acceptance criteria. Prohibit changes to features in PI unless PM approves and all teams agree on the change. • There seems to be confusion around delivery. Teams don’t always gel when working towards delivery. Uncertainty around dependencies. • Need to improve our methods of evaluation and assessment of dependencies and risks. Too much escalations and over-talking.

Responsiveness	<ul style="list-style-type: none"> • Work towards bringing off-train teams on the ART. IT is a huge partner and future success is dependent on having them part of the ART. Also our operations partners. They represent ~50% of the team.
Quality	<ul style="list-style-type: none"> • TOOL - Dependencies - Is it possible to add an comments section instead of trying to add comments/notes to the chat field. • TOOLS - Jira Align needs to provide all members of the Agile/SAFe team the ability to view and communicate risks and dependencies. • TOOLS - Jira Align and Jira export could be improved. The current set up focuses singularly on tracking daily status - not enabling a more longer or holistic view of various types of the runway. • Better definition and guidelines on roles and responsibilities. There were instances where it was 'assumed' someone would take responsibility, however that assumption was not always communicated properly. • Executive status reporting focuses too much on LACE accomplishments, would like to see a more of a 360 view. • Often communication still seems to follow a top down approach or within secular pockets. • ROLES - Advance the maturity and skillsets of key Program roles like Product Management and RTE. • Transparency and communications within ART needs to improve. • We made progress during the first PI regarding dependencies, however we need to come up with a better process to define, assign, resolution, and hand-off/acceptance. • DEVOPS - Need better collaboration with these teams to achieve a true dev/ops model. There must be agreement and support at the leadership level across the organization to ensure success with a dev/ops model.

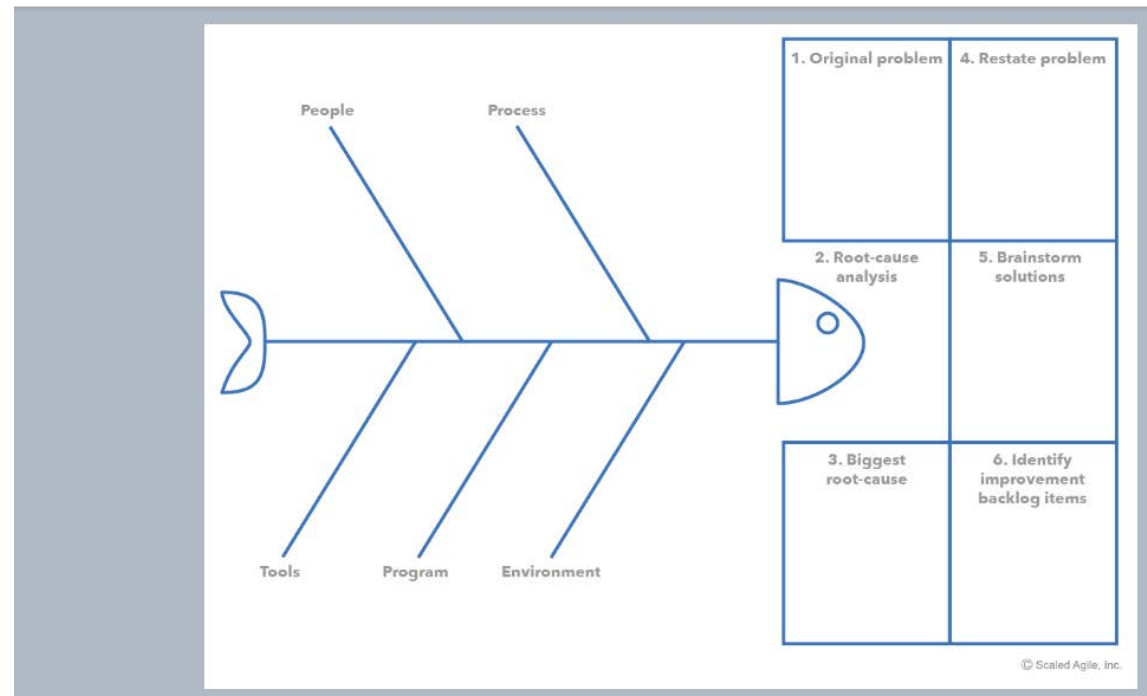
- Following some general discussions around these findings with a “flash retro” to see if something was hidden or got lost in the initial survey.
- Breaking attendees into four different PPRQ groups. Ask for four volunteers among scrum masters to shepherd each discussion. Breakouts allow each group to try to find solutions for each domain. They can try to hit each concern or prioritize their list and focus on only those they feel are the most important. Allow members of the different groups to mingle and join in the conversation, so everyone can cross-pollinate and share in the solutioning across each problem domain.
- Sharing recommendations through each group’s readout. The agreed upon solutions can then become activities that form part of the upcoming PI.

- Teams should organize themselves
- Rapidly size-up the issues you will be addressing including any Flash Retro "Bads"
- Teams begin solutioning:
 - Consider How you will solve the problem and the Steps needed to achieve the result
 - Consider the Time Criticality of the solution
 - Then determine the Who. This could be the team, organization or method for delivering the solution (will this be a future architectural feature, an NFR or assigned to a specific team or group to accomplish?)
 - Don't forget to state the Benefit the solution provides
- All teams will present their solution strategies so the entire group can provide feedback and suggestions

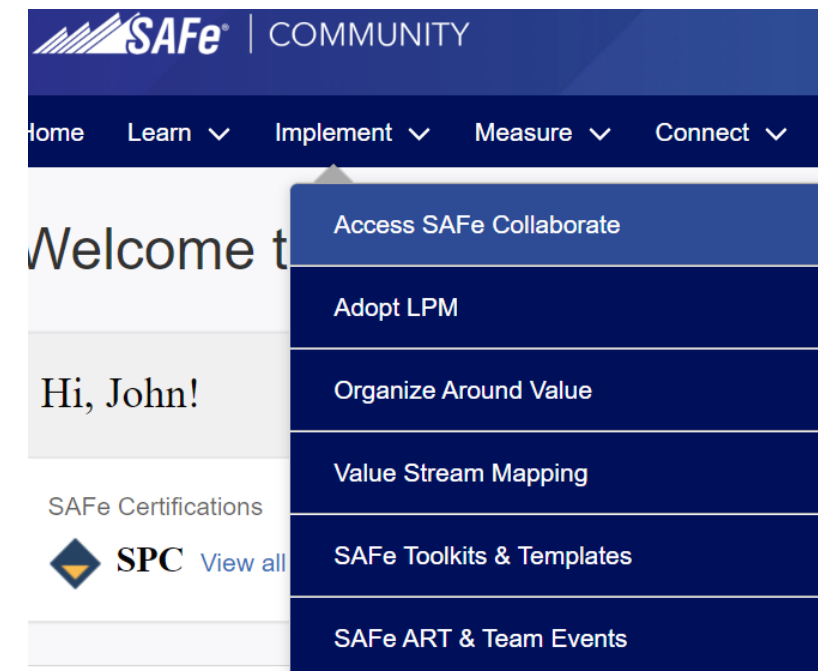


This may be a good time to mention the Community area on the SAFe website, which provides numerous templates for all activities of SAFe. For instance, below is one online template I repeatedly use during I&As:

SAFe® Problem Solving Board APR 13, 2020



Under the SAFe Community Members area, just click the **Implement** menu and choose **Access SAFe Collaborate**.



8

Extend and Expand

Launch new ARTs and consider new approaches and process improvements

In truth, what we are saying is:

“Bring the portfolio level of SAFe into the picture.”

This is a new way of doing things. A new way for teams to visualize their work and measure their flow. This creates momentum that can be harnessed at the portfolio level, where ideas arise, are evaluated, and are ultimately funded.

Be sure to adequately manage capacity, have better ways to cost account, apply value, add Agile capitalization techniques, improve ROI projection methods, strengthen vendor management, and mitigate risk.

This is often where a strong Lean-Agile project management office (APMO) takes charge and ensures that transformation continues to take root, grow, and mature, with the goal of nurturing Leaner governance practices within the organization.

For Example:

- Leading overall improvements
- Continuously aligning our value streams and new value streams
- Maintaining enterprise value flow
- Implementing Lean financial management and budgeting techniques
- Aligning demand to capacity
- Providing reliable Agile forecasting

This may appear as the last step in the process, but in actuality it is the first step of the next stage of the journey. Here is where organizations reap the benefits of what's been started and apply them in a manner that forces change throughout the organization. Many may already know what we're doing and what we've done. Others may not. Proliferating into associated areas like HR, operations, legal, finance, accounting, sales, and marketing will be a good thing.

Introducing a new process and proving it works is only half the battle. This is a time to strengthen the LACE and introduce new communities of practice. It is also wise to start improving our metrics program, expanding our I&A approach, and applying self-assessments.

Actions:

In the real world, many companies see Agile transformations as just a way to tighten the delivery pipeline or deliver faster. Some in upper management see Agile as only 'that thing our workers do,' with little notice of Agile's effect or impact on how leadership envisions objectives or prioritizes the company's direction. This is a little short-sighted, as Agile provides benefits across all areas of an organization.

Bring executives and business leaders over to Agile portfolio thinking by offering:

- Agile introduction or Agile 101 sessions. Help not only the leadership driving your ARTs, but also any ancillary departments, like HR, marketing, and finance, to better understand what Agile can truly do for them.
- Leadership refreshers. Keep hosting SAFe Executive Workshops, Leading SAFe, and Agile intros across the company.
- Scrum and SAFe refreshers. Take the SAFe for Teams course and re-purpose it as a two-hour refresher class.
- Role-based training. Agile, and SAFe, offer a new set of roles meant to empower and embolden your people. Each role has a special set of associated actions and responsibilities. Team up with your HR to facilitate training and workshops to coach staff.
- Metrics awareness workshops. If you've introduced new metrics, have sessions to help managers understand the value of sizing the progress of initiatives in an Agile way and mitigating risks and KPIs for measuring scope fluctuation and value (i.e., Agile feature schedule health, acceptance value rating, scope fluctuation monitoring, etc.)

Gains in productivity, predictability, responsiveness, and quality in our product teams are a win-win for the entire company, not just a certain few.

In summary...

Here's a quick checklist to consider.

Step	Action	Outcome
The tipping point	<ul style="list-style-type: none"> ✓ Do a SWOT ✓ Kick-start presentation 	<ul style="list-style-type: none"> ✓ Examine market and competitive realities ✓ Identify and discuss crises, potential crises, or major opportunities
Create the coalition	<ul style="list-style-type: none"> ✓ Hire the right people ✓ Train your executive body ✓ Create the LACE 	<ul style="list-style-type: none"> ✓ Assemble a group with the power to lead the change ✓ Plant the seeds for a Lean-Agile center of excellence (LACE) group
Create the guiding vision	<ul style="list-style-type: none"> ✓ Value stream identification ✓ Conceptual mapping 	<ul style="list-style-type: none"> ✓ Create a vision to help direct the change effort ✓ Develop strategies for achieving that vision
Communicate and begin training	<ul style="list-style-type: none"> ✓ Leading SAFe ✓ SAFe Executive Workshop ✓ Agile 101 and intros ✓ Scrum master training ✓ Product owner training 	<ul style="list-style-type: none"> ✓ Use all vehicles possible to communicate the new vision and strategy ✓ Identify and assign key roles ✓ Coach and train your Leaders

Empower others	<ul style="list-style-type: none"> ✓ SAFe for Teams training 	<ul style="list-style-type: none"> ✓ Create the framework (systems and structures) to support the vision ✓ Identify a pilot portfolio and program (ART) ✓ Train all key roles ✓ Train teams
Pilot launch	<ul style="list-style-type: none"> ✓ Create a plan ✓ Hold a mock run PI planning 	<ul style="list-style-type: none"> ✓ Create a plan to drive improvements ✓ Prepare for your first ART PI planning session
Execute	<ul style="list-style-type: none"> ✓ Pre-PI planning ✓ Mid-PI review ✓ PI planning ✓ Inspect & Adapt 	<ul style="list-style-type: none"> ✓ Refine processes using empirical data as you go ✓ Collect and publish metrics ✓ Begin visualizing new ARTs
Extend and expand (Accelerate)	<ul style="list-style-type: none"> ✓ Agile intros ✓ Leadership refreshers ✓ Scrum & SAFe refreshers ✓ Metrics awareness workshops 	<ul style="list-style-type: none"> ✓ Articulating the connection between the new behaviors and corporate success ✓ Nurture and grow ✓ Develop the means to ensure leadership development and succession

These steps are both tactical and pragmatic, intended to demonstrate how SAFe can become the backbone of a strong organization.



About Apptio

Apptio, an IBM company, is the leading technology spend and value management software provider. Apptio's AI-powered data insights empower leaders to make smarter financial and operational decisions across Information Technology (IT), multi-cloud FinOps, and digital product development. Apptio's mission is to deliver business value with every technology investment and team. Powered by Apptio's cloud platform, Apptio's SaaS applications translate technology spend into clear business outcomes and financial ROI. As a pioneer and category leader in Technology Business Management (TBM), FinOps, and Agile Portfolio Management, Apptio works with thousands of customers, partners, and community members worldwide.

To learn more about IBM Targetprocess,

[Start Your Free Trial](#)

