



The on-ramp to Scaled Agile Framework (SAFe)

3 must-haves for starting your journey

MANMEET AHLUWALIA

SAFe Program Consultant

ALISON BRAUN

Manager and Agile Coach



So your organization has a whole network of Agile teams humming along, delivering customer-delighting features sprint after sprint, generating all the benefits the Agile framework promises. Now everyone agrees it's time to take it to the next level, to begin scaling up.

You started researching the various scaling frameworks available and **decided to go with Scaled Agile Framework (SAFe)**, the most popular option for achieving business agility. As you dug deeper, you might have been overwhelmed by the barrage of new terminology, new job titles, new ceremonies—prompting the question *“Are we even ready for this?”*

After working with multiple clients to begin their transition to SAFe, we can safely (pun intended) offer the answer “maybe not ... yet.” Jumping into a SAFe implementation before the organization is fully ready can be a recipe for wasted time and resources, not to mention anxiety and frustration.

In this article, we'll discuss **three must-have prerequisites to have in place before beginning your SAFe journey**. But first ...



No Agile, no SAFe

It seems like a no-brainer to say that **your teams must be firmly rooted in the Agile framework before you can even think about scaling up**. Yet you might be surprised by how many organizations have tripped over this very stumbling block.

That is not to say that the whole organization must already be practicing Agile—that's the end goal of your journey to SAFe. But you should have **a solid base of empowered, self-managing teams that are closely following Agile principles**.

Far too many organizations cherry-pick a few practices so that they can slap an Agile label on what is essentially the same command-and-control approach. If and when these businesses try to scale up—with SAFe or with any other framework—the results are rarely pretty.



Before beginning your journey to SAFe, make sure your teams are firmly rooted in the Agile framework.

3 must-have elements for starting your SAFe journey

1. SAFe training for all team members

Although based on existing Scrum and Agile principles, **the SAFe framework does introduce different terms and concepts** as it takes on the charter of implementing an organization-wide Agile movement.

Training team members, especially leadership, in the SAFe framework is imperative. Leaders must have a good understanding of their strategic themes, their value streams, and how to restructure their horizontals and verticals to effectively implement SAFe and deliver greater value than before. Leadership training also fosters an appreciation of properly funded, planned work and high-level objectives that can potentially inform the program backlog.

The next step is to train the teams, so that plans coming from top down can be implemented effectively.



2. Selection of a SAFe configuration, definition of ARTs, and identification of product management/leadership teams

This is where the rubber begins to meet the road in terms of SAFe principles being applied to your organization.

A lot of companies falter in adopting SAFe because they get confused about which SAFe configuration (Essential, Large Solution, Portfolio, or Full) to follow. SAFe provides guidelines on which configurations are best suited to which kinds of organizations. Identifying the right configuration is imperative, but **no matter the choice, organizations should remember that the “Essential SAFe” guidelines need to be followed**, as they form the basic component of all four configurations. As an example, if a company is conducting solution-level Program Increment (PI) planning, it must not forget to include ART (Agile release train)-level PI planning, which is imperative for enabling teams to view, change, and ultimately commit to a multi-sprint plan.

Furthermore, poorly defined ARTs and fuzzy concepts of leadership roles can be the demise of even the most well-planned SAFe transitions.

These definitions should start with the higher objectives: Consider who your teams are and the big picture of what they’re aiming to accomplish. The leadership dimension is vitally important, as leaders act as funnels for information as it travels through the SAFe ecosystem.

As you define management and leadership roles, pay particular attention to the following:

- **Business owners** are responsible for higher business objectives, including governance, compliance, and ROI of solutions developed by the ARTs.
- **Product managers** drive the Program Increment and the product; they also own the program backlog and define features and releases.
- **Product owners** drive the iteration; they own the team backlog(s) and define iterations and stories.
- **Scrum masters** help their teams achieve their goals by coaching and educating on Agile and SAFe frameworks, ensuring that the agreed-upon Agile process is being followed, eliminating impediments, and maintaining a team environment focused on continuous flow and improvement.
- **Release train engineers (RTEs)** function as “scrum masters of the scrum masters,” ensuring that teams can deliver on their promises without impediments. If a business owner determines that a change is needed, it’s the RTE who brings the teams together to discuss the orientation shift.

More roles may need to be defined based on the configuration the organization decides to follow, but more often than not, existing roles can be mapped to new ones with the right trainings.

3. Build a plan for the first PI planning session

Program Increment planning is an important event, usually two days long, in which all teams in an ART come together to look at their shared goals and plan to deliver those goals in the next Program Increment. **The organization must already have defined the length of their PI and determined whether the release dates of the PI would be aligned to enterprise release dates.**

To help ensure a successful session, we developed the following **pre-PI planning checklist** (not exhaustive):

- Clearly defined, leadership-approved, and funded PI objectives, which may at the end of the PI planning be committed or uncommitted
- Team capacity estimates with planned leaves factored in for the entire ART
- Defined workload features that are prioritized, sized, and assigned to teams. In an ideal world, the PI planning session should not be the first time teams hear of a feature
- Accepted invitations for upstream or downstream impacted non-ART teams
- Known dependencies and relevant risks
- Implementation roadmap, release dates, and rough plan of branching strategies (likely to get fleshed out in discussions)



- Project Agile tools loaded with appropriate information, like capabilities, features, capacities, etc.
- A previously tested tool for conducting the PI planning if it is not an in-person event

PI planning is not a science, and **it takes practice and stakeholder contributions to perfect**. Some teams may choose to have a three-day instead of two-day PI planning session. Start and end times may also need to be tweaked based on the time zones where different participating teams are located.

Walking out of PI planning, the teams should have a 100 percent plan in place for **the very first sprint of the PI and a good idea of what the rest of the sprints will look like**. The last few sprints may not necessarily be locked down completely, considering that changes may occur in the overall plan.

We like to call PI planning “the magic of SAFe,” and it’s easy to see why. When it’s done well, it’s tremendously effective and team members enjoy it; if it’s done poorly, ... not so much.



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Final tip: Lay the foundation for a continuous learning culture

The continuous learning culture is one of the seven core competencies of the Lean Enterprise, an essential component for achieving business agility. The earlier you can instill a **commitment to increasing knowledge, competence, performance, and innovation** in the minds of leadership, stakeholders, and team members, the greater your chances of success in your SAFe transformation.

Your organization can begin the journey towards becoming a continuous learning culture by focusing on three critical dimensions:

- **Learning organization:** Employees at all levels are continuously learning, which enhances the organization's ability to adapt to an ever-changing environment.
- **Innovation culture:** Enable future value delivery by encouraging employees to innovate and implement creative solutions.
- **Relentless improvement:** The organization maintains and cultivates a continuous focus on improving its processes, products, and solutions.



Pack your bags

Just as you wouldn't set out on an international trip without having your passport, your carefully packed suitcase, and your plane tickets in hand, **no journey to SAFe should begin without having these three essentials in place.** Once you've secured buy-in from organizational leadership, training for all team members, definitions of key structures and roles, and a plan for the first PI planning session, you'll be well positioned to roll up the on-ramp and begin your SAFe journey.

 www.logic2020.com

 solutions@logic2020.com

