

Navigating the Tornado with your SAFe implementation



Mark Richards

SAFe Fellow
Coactivation



My SAFe Journey began in 2011

Big IT Shop, Down Under

Portfolio & Program Kanban at work

SAFe Customer Stories > Big IT Shop, Down Under



Industry:

Information Technology

While the name of the enterprise cannot currently be disclosed, this five-part case study by SPC (now SAFe Fellow) Mark Richards from Australia is loaded with practical tips, implementation guidance, and extensions (and one pretty big exception) to typical SAFe. (Important Note: in this case study, they don't actually time box the work into PSIs; it's a more continuous, rolling-wave look at about the next 10 weeks of work. It has some advantages over PSI planning, in that it's more continuous flow and features don't have to be forced to be split into PSI cycles; simply, it's a more Continuous Delivery (or at least continuous development flow) model. But it has some disadvantages and some restricted contexts too, many of which are compensated for with alternative cadence and synchronization practices.)

Here are the first four parts, a work in process. In chronological order.

Part 1: Scaled Agile Framework Applied 1/5: Introduction and Context

Part 2: Scaled Agile Framework Applied 2/5: Demand Management and the Portfolio Kanban

Part 3: Scaled Agile Framework Applied 3/5: Program Level Pipeline Management and the Program Kanban

Part 4: Scaled Agile Framework Applied 4/5: In-Play Work and the Program Level Feature Wall

Part 5: Scaled Agile Framework Applied 5/5: Conclusion. (Read this post to see key lessons learned and quantitative results).

- Average delivery cycle time down from 12 months to 3 months
- Frequency of delivery increased from quarterly to fortnightly
- Cost to deliver down 50%
- 100% of projects delivered on time and on budget
- Happy project sponsors (NPS 29)
- Happy teams (Team NPS 43)

I began blogging about it soon after

The ART of SAFe

Applying Lean and Agile techniques at scale to bring about effective, sustainable improvement in Culture, Execution and Business Results

Wednesday, June 20, 2012

Agile Leadership and learning by doing

One of the groups I am working with is adopting Dean Leffingwell's Scaled Agile Framework – better known by them as the Agile Release Train. For various reasons (not the least being that I'm not as compelling as Dean), they're employing a gradual transition rather than an "all-in and no turning back quick-start".

The group began by establishing program and portfolio backlogs and the kanban systems to support them as a process layer superimposed over the existing agile teams and their backlogs. Once the initial dust settled, a virtual team was formed from the senior leadership group to plan and prepare for the first 2-day PSI Planning session. During the first visioning workshop, a futurespective was used to create the plan. It began with the following question

"What will it look like at the start of the first day when we walk into the room with over a hundred team members and stakeholders and how do we ensure success?"

From there, it moved back a week at a time as the topics of lead times, logistics, invitations, communications, funding and so forth were covered. A "PSI Planning" backlog was created in Rally, cards went up on a kanban wall and the group was set to roll with 4 2-week sprints before the train left the station.

At the end of the first sprint, velocity was 0. Most planned stories were unstarted, and nothing was finished. What emerged, of course, was that all involved were busy managers with a "day job" and the time just didn't exist in the day to make this happen as well. So, a new 1 week "Sprint 0" was agreed where the only goal was for every member of the team to find things they could stop doing and/or delegate to make some capacity available. Conveniently, I spent that week in the States getting lots of fresh tips and tricks from Dean in his certification class.

Sprint 0 was reasonably successful, and the team recommenced a revised sprint 1. I'd come back armed with lots of new insights from Dean, and the team had agreed there would be a scaled down internal-only "PSI Zero" planning which brought the goal down to something less scary and easier to grasp whilst raising the urgency.

Sprint 1 just concluded, and it's fair to say the journey is still very convoluted and the velocity was still near zero in "accepted stories". But the reason I sat down to write this tonight is the retrospective that happened this afternoon. One of our most creative scrum masters turned "What worked/What didn't" into "Freaking Awesome/Shambolic Malaise", and the insights were fascinating – following are a few that stand out.

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 Mark Richards

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SAFe Program PI Metrics

- Introduction
- Business Impact
- Culture
- Quality
- Speed
- Conclusion

More on Metrics

- Introduction to OKRs
- Improving Product Strategy with OKRs
- Accelerating Relentless Improvement with OKRs

WSJF and Cost of Delay

- From Theory to Practice
- From Belief to Action
- Improving SAFe COD

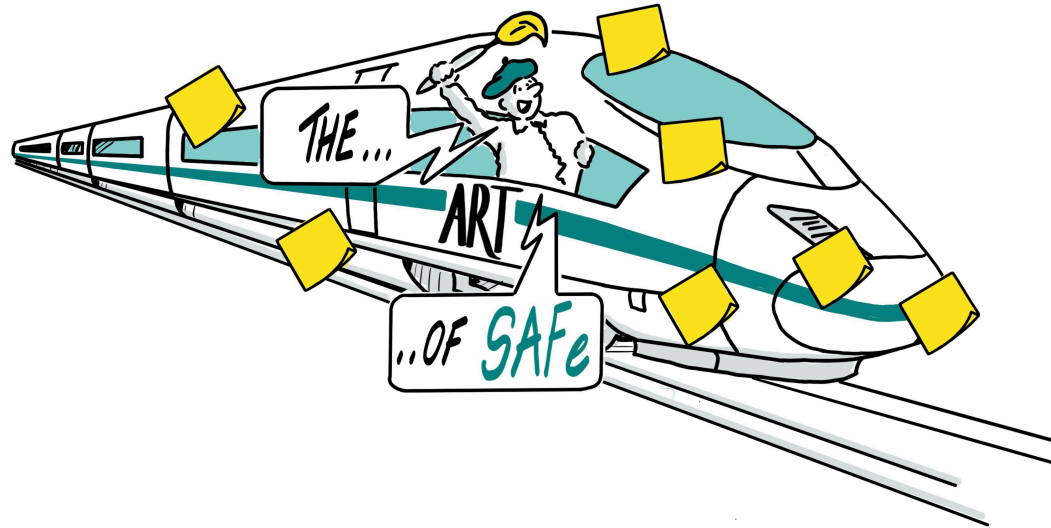
At www.agilenotanarchy.com

In 2017 I started talking about writing a book

Personal OKR Example

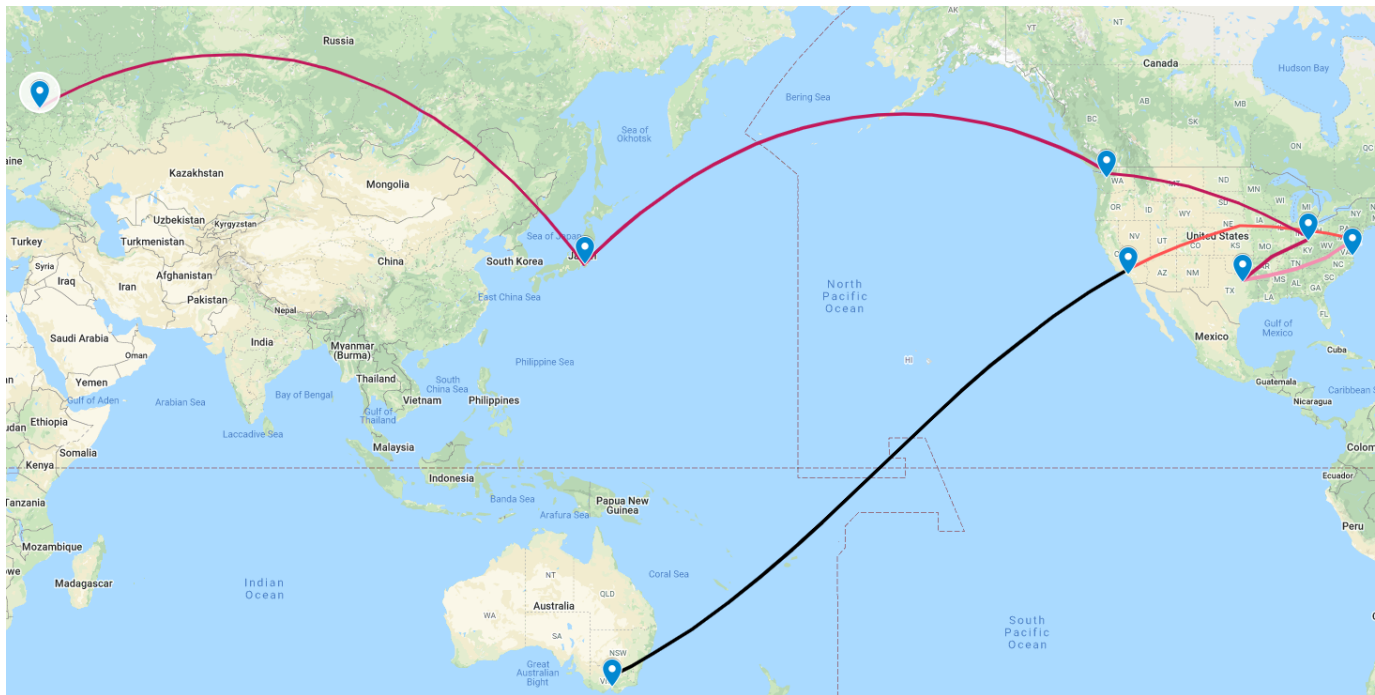
Objective	Be confident to commit to book-writing retreat
Key Results	<ul style="list-style-type: none">• Publish 12 new blog articles (starting with Metrics conclusion)• 40% increase in views per month

In 2019 I got serious



The book was going to share everything I knew about launching, supporting and evolving high-performing Agile Release Trains

I tested my hypothesis by studying implementations I hadn't coached



And I realised I was writing the wrong book

I saw the same symptoms again and again, and upon *reflection* recognised them in my own implementations



In 1955, Marilyn Monroe immortalized the “7 year itch”

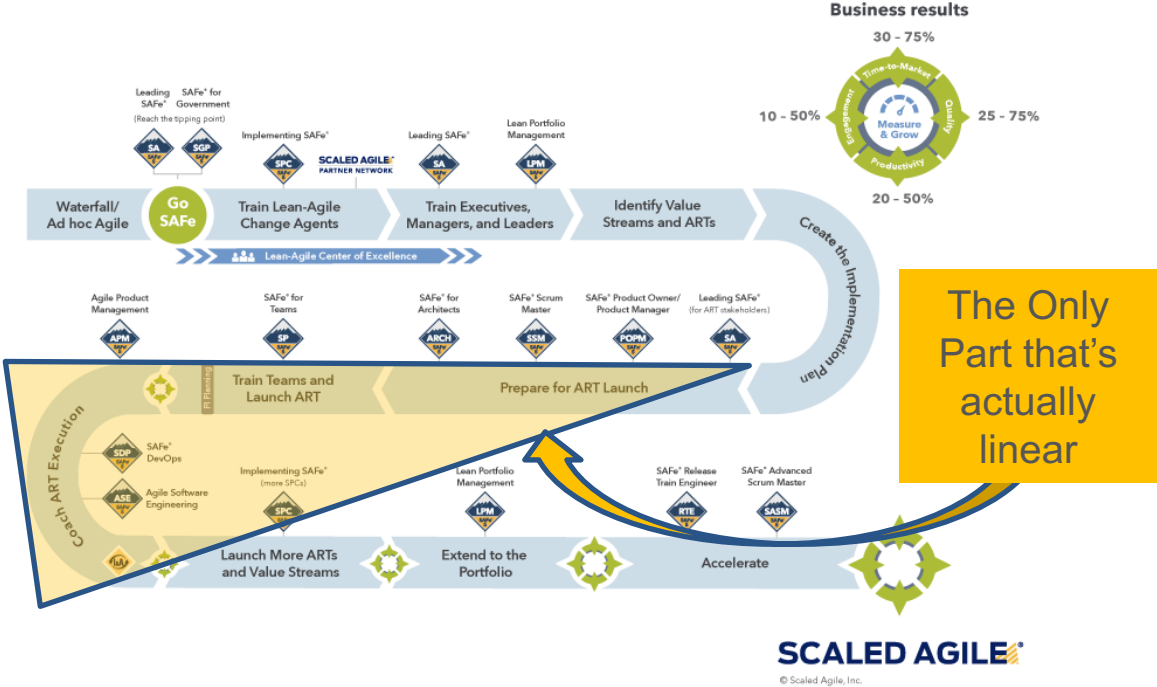
The vast majority of SAFE implementations have a 2 year itch!

Symptoms of the “2 year itch”

- ▶ The first ART or two were very successful, but that level of success has been hard to replicate
- ▶ Struggling with Business Engagement
- ▶ LACE regularly being asked to justify its existence/value proposition
- ▶ Regular questions about how to prove SAFe has actually worked
- ▶ “Release on Demand” and DevOps in general still more theory than reality
- ▶ Drowning in cross-ART dependencies
- ▶ Challenges progressing the “value discussion” beyond PI predictability to “P&L” style value
- ▶ Little real change to the funding cycle/model

Many organisations with the “2 year itch” have official Case Studies or have presented success stories at SAFe Summits

The SAFe Implementation Roadmap was not enough!



Agile Product and Solution Management

Using Design Thinking to Create Valuable Products
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SAFe® Authorized Course Attending this course gives students access to the Agile Product and Solution Manager exam and related preparation materials.



4.6.0

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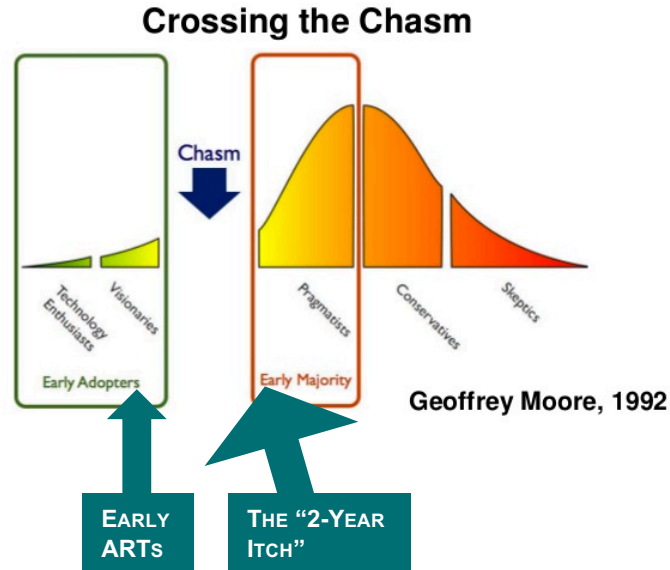
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We're introducing a discontinuous innovation

A new product or service “that require[s] the end user and the marketplace to dramatically change their past behaviour, with the promise of gaining equally dramatic new benefits”

- Geoffrey Moore, Inside the Tornado

And products don't follow linear lifecycles



“The winning strategy does not just change as we move from stage to stage, it actually reverses the prior strategy”
- Geoffrey Moore, Inside the Tornado

Customer Centricity requires knowing your customer

Early Adopters are **Visionaries**

- Intuitive
- Support revolution
- Contrarian
- Break away from the pack
- Follow their own dictates
- Take risks
- Motivated by future opportunities
- Seek what is possible

Early Majority are **Pragmatists**

- Analytic
- Support evolution
- Conformist
- Stay with the herd
- Consult with their colleagues
- Manage risks
- Motivated by present problems
- Pursue what is probable

“Visionaries think pragmatists are pedestrian, and pragmatists think visionaries are dangerous”

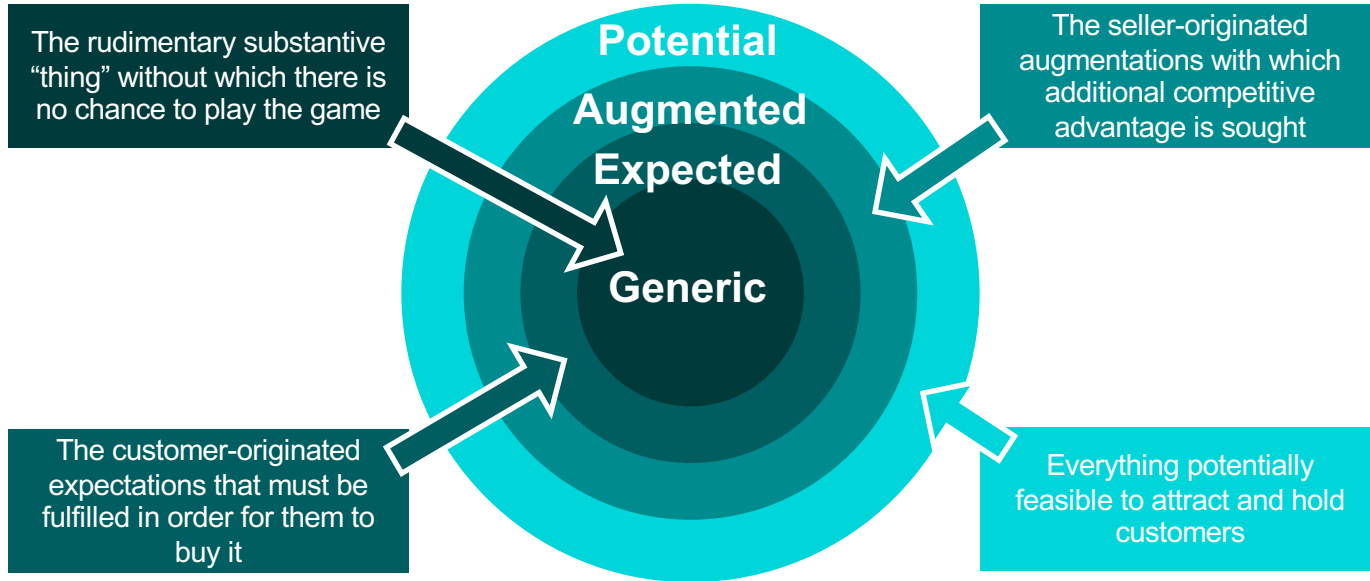
- Geoffrey Moore, Inside the Tornado

Pragmatists want the “Whole Product”

“What pragmatists want, more than anything else, is a 100% solution to their problem – what we came to call the whole product ... the minimum set of products and services necessary to ensure that the target customer will achieve his or her compelling reason to buy.”

- Geoffrey Moore, Inside the Tornado

What is a “whole product”?



“A product is, to the potential buyer, a complex cluster of value satisfactions. The generic ‘thing’ or ‘essence’ is not itself the product. It is merely, as in poker, the table stake, the minimum necessary at the outset to allow the producer into the game.”

- Theodore Levitt, *The Marketing Imagination*

SAFe as the Generic Product

Planning & Prioritization	Roadmaps, WSJF, PI Planning, Iteration Planning	Specific Guidance with Practices & Events
Scoping	Epics, Capabilities, Features, Stories, Continuous Exploration	
Design	Architectural Runway, Emergent Design	
Staffing & Structure	Portfolios, Solution Trains, ARTs, DBT Teams, Triads, SM, PO	
Execution	ART Sync, SoS, PO Sync, Daily Standup, Kanbans, Scrum, Kanban	
Dependency Management	Program Board, Pre and Post PI Planning, Sync Meetings	
Execution Monitoring	System Demo, Iteration Review	
Ability to Adjust	Inspect & Adapt, Retrospectives	
Quality Assurance	Feature & Story Acceptance, Definition of Done, Built in Quality	
Deployment	Feature & Story Acceptance, Continuous Deployment	

Visionaries focus on the promise of the Augmented Product, and tend to be satisfied so long as the Generic Product is on the table.

SAFe as the Expected Product

Initiation approach	SAFe Implementation Roadmap		Specific Guidance with Practices & Events
Training & Support for Involved Staff	Extensive set of certified SAFe courses, SPC's	SAFe Partners	
Engineering standards & artifacts	Solution Intent		Competency Dimensions
Governance	Lean Governance		
Asset Lifecycle Management	Take an economic view, Apply systems thinking		Principle-based Guidance
Service Management	Apply systems thinking, Take an economic view		
Procurement	Apply systems thinking, Base milestones on object evaluation		Advanced Topics
Vendor Management	Agile Contracts		
Funding & Cost Monitoring	Strategy & Investment Funding	Capex & Opex	SAFe Principles
Organisational Change Management	Lean Business Operations, Lean-Thinking People & Agile Teams		
Operational Support	DevOps and the Continuous Delivery Pipeline		Partner Ecosystem
Ability to Market & Sell Product	Lean Business Operations, Lean-Thinking People & Agile Teams		
Audit	Lean System & Solution Engineering		
Security	Lean System & Solution Engineering, DevOps		
Tooling	SAFe Platform Partners		
HR Career paths & Performance Mgmt	Agile HR with SAFe, An HR Playbook for a Successful SAFe Imp		
Regulatory & Compliance	Lean System & Solution Engineering		

Visionaries “know they are going outside the mainstream, and they accept that as part of the price you pay when trying to leapfrog the competition”
Geoffrey Moore, Crossing the Chasm

SAFe as the Augmented Product

Respond rapidly to changing market needs

Alignment of execution to strategy

Engaged workforce

Increased productivity & Quality

Increased Speed to Value

Reduced Waste

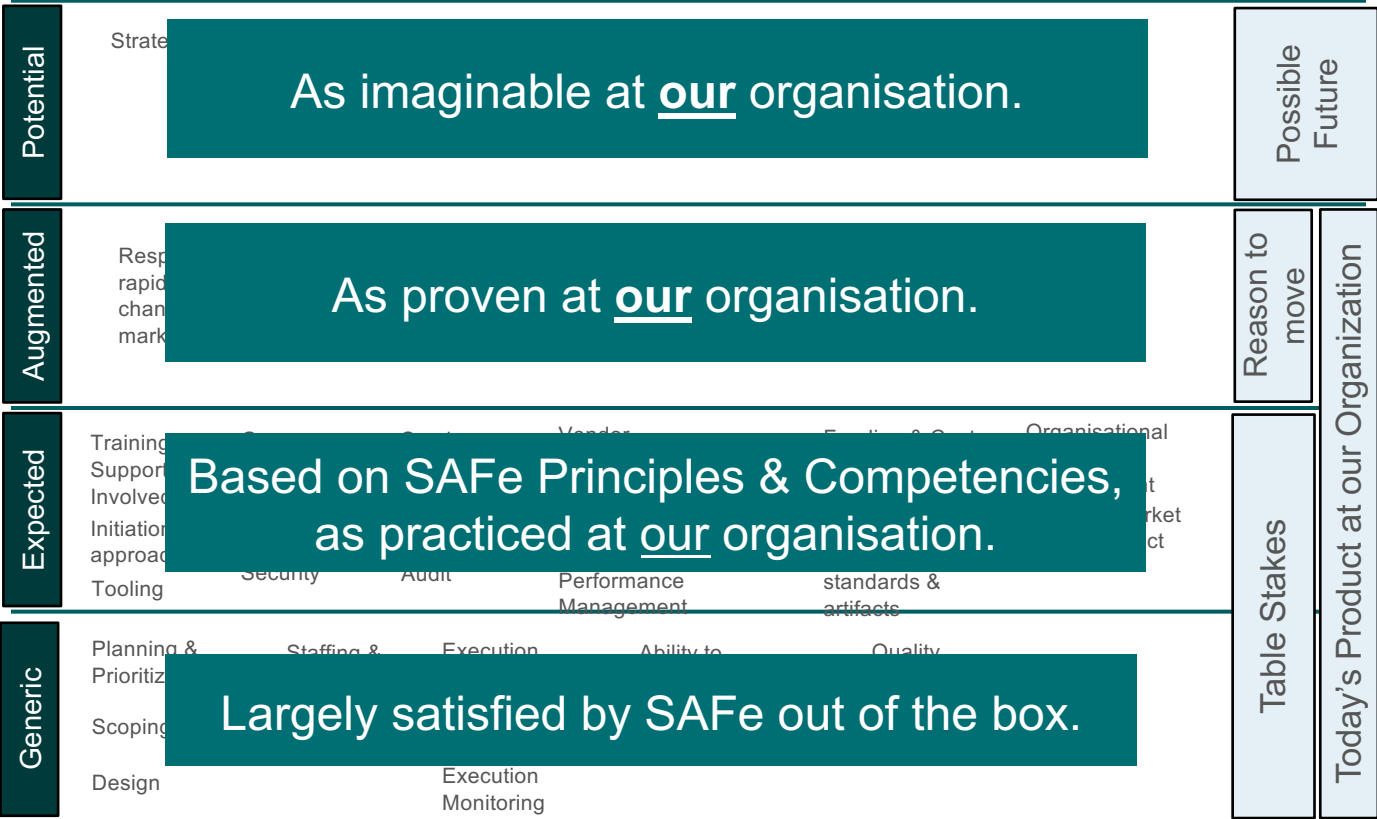
As proven in
dozens of Case
Studies at

<https://www.scaledagile.com/customer-stories>

*Visionaries “are buying a dream
that, to some degree, will always
be a dream”*

Geoffrey Moore, Crossing the Chasm

So what is the Pragmatist's "whole product" ?



The “Whole Product” is defined by the Market

If you consider your organisation to be the “Total Available Market”, you don’t need the “Whole Product” for the “Whole Market”, you just need the “Whole Product” for part of the market.

The Textbook Strategy

The image features a dark blue background with white, wavy, grid-like lines that create a sense of depth and movement. Two small orange triangles are positioned on the right side, one near the top and one near the bottom, pointing towards the center. The overall aesthetic is modern and professional.

Segment your Organisation

Primary Attributes

- Value Streams
- Lines of Business
- Geographic Markets
- Product Groups
- Strategic Service Offerings

Potential Secondary Attributes

- Technology Employed
- Regulatory and Compliance Challenges
- Security Risk Profile
- Audit needs
- Vendor strategy
- Procurement environment
- ... see other “Expected Product” elements

Critical Attributes: Ability to prove

- Better speed to value
- Increased productivity
- ...Other Augmented Product elements

“If you’re not thinking segments, you’re not thinking.”

- Theodore Levitt, The Marketing Imagination

Find Visionary Early Adopters



Augmented

Generate success proof points

Expected

Help them navigate the gaps

Generic

Get “Essential SAlFe” working

Establish your beachhead with a Pragmatist

Reframe the boundaries of your existing implementation to be attached to a pragmatist

Or expand your implementation to a market segment owned by a pragmatist

Augmented

Quantify your success proof points

Expected

Implement the “whole product” for the pragmatist

Generic

Continue to refine your basics

Navigate the Bowling Alley



Expand your implementation to neighbouring segments, extending your whole product as you go!



Building momentum with a growing cohort of successful pragmatists economic buyers

“Commoditise your whole product for general-purpose use”

- Geoffrey Moore, Inside the Tornado

For example

Beach-head Segment

Primary Attribute:

- Value Stream

Secondary Attributes:

- Vendor Involvement: None, all FTE
- Technology: B2C Digital
- Regulatory Concerns: None



Solve the following for this segment to get to whole product:

- Security
- Funding and cost monitoring
- Operational support
- Marketing and Sales
- Service Management
- CI/CD
- True Economic Model
- etc

Neighbour Segment 1

Primary Attribute:

- Value Stream

Secondary Attributes:

- Vendor Involvement: Mix of FTE, 1 Major SI
- Technology: B2C Digital
- Regulatory Concerns: None



Enrich whole product to handle:

- Security implications of SI involvement
- Funding and cost monitoring implications of SI involvement
- ...
- Use this SI as a test case for required changes to Vendor Management protocols under SAFe

Neighbour Segment 2

Primary Attribute:

- Value Stream

Secondary Attributes:

- Vendor Involvement: None, all FTE
- Technology: B2C Digital
- Regulatory Concerns: Industry Body



Enrich whole product to handle:

- Specifying and validating industry body based regulatory concerns under SAFe

“Just ship” in the Tornado

Leverage the mandate from your cohort of successful pragmatist economic buyers to rapidly scale to your technical buyers.

Survive the demand by commoditising the enriched ‘whole product’ you established in the tornado.

“When tornado demand hits, it far exceeds the initial supply. When a vendor acts in any way to further restrict supply, it is fighting the tornado, and the market will try to go around it, isolate it and spit it out!”

- Geoffrey Moore, Inside the Tornado

Optimise on Main Street



“The goal on Main Street is to maximise the financial yield from your installed base. You have captured your territory, now it is time to till it!”
- Geoffrey Moore, Inside the Tornado

The Truth rather than the Textbook

The image features a dark blue background with a white wavy line pattern that creates a grid-like effect. Two small orange triangles are positioned on the right side of the image, one near the top and one near the bottom.

Most organisations cross the Chasm without a “Whole Product”

Rolling the “Generic Product” aspects of SAFe out to thousands of people

Whilst shoe-horning it into the legacy model for most aspects of the Expected Product

Expected	Funding & Cost Monitoring	Asset Lifecycle Management	Initiation approach
	Organisational Change Management	Service Management	Training & Support for Involved Staff
	Operational Support	Procurement	Engineering standards & artifacts
	Ability to Market & Sell Product	Vendor Management	Governance
	Tooling	Security	Audit
	Regulatory & Compliance	HR Career paths & Performance Mgmt	

And without any more than “proxy proof” of the Augmented product promise.

SAFe@YourOrg is a renewal-based Product



Buying a gym membership
won't make you fit



Overlaying SAFe language and events
without changing the underlying system
won't give you business agility

And reach Main Street with huge “Transformation Debt”

“Welcome to Main Street. Your customers hate you; your employees are burnt out and demoralised; your management team’s greatest experience is political infighting”

- Geoffrey Moore, Inside the Tornado

The image features a dark blue background. The top portion is a solid blue band. The bottom portion contains a complex pattern of thin, white, wavy lines that create a grid-like effect, resembling a stylized landscape or a data visualization. Two small orange triangles are positioned: one in the top right corner and another in the bottom center, pointing towards the right.

What can you do about it?

Re-segment your organisation and fix incrementally

Primary Attributes

- Value Streams
- Lines of Business
- Geographic Markets
- Product Groups
- Strategic Service Offerings

Potential Secondary Attributes

- Technology Employed
- Regulatory and Compliance Challenges
- Security Risk Profile
- Audit needs
- Vendor strategy
- Procurement environment
- ... see other “Expected Product” elements

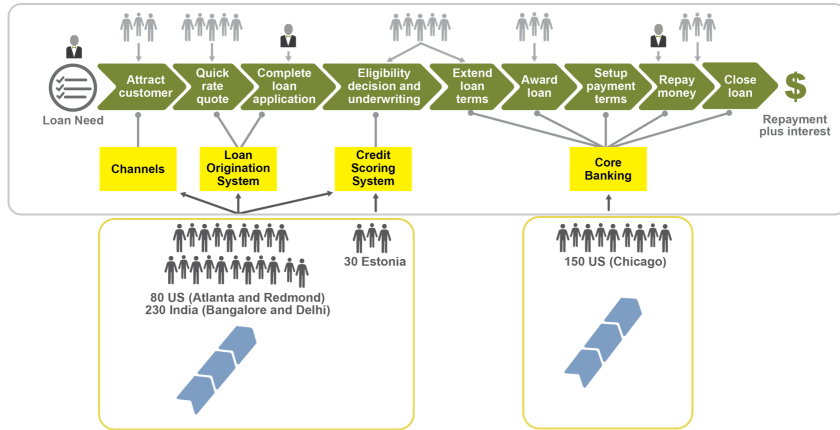
Critical Attributes: Ability to prove

- Better speed to value
- Increased productivity
- ...Other Augmented Product elements

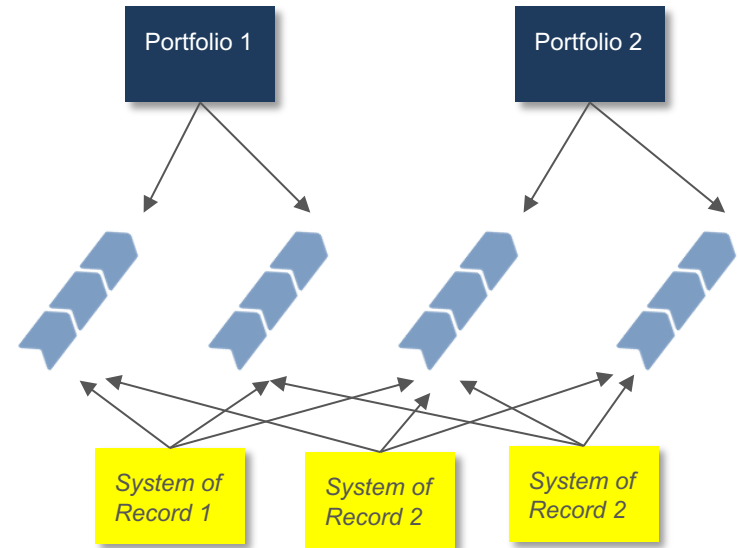
With a focus on finding segments which you can bring to “whole product” status, and leverage as beach-heads to neighbouring segments

Fix your “whole product” one vertical slice at a time – iteratively and incrementally!

Your structure will never be as clean as SAFe suggests



In the pictures you put everyone who works on a system in a single value stream



In practice your core systems of record are needed by many value streams across multiple portfolios

Get some help from Team Topologies

Stream-aligned ARTs

“Most [ARTs] in a flow-optimized organization should be long-lived, multi-disciplined, stream-aligned teams .. [who] take ownership of discrete slices of functionality or certain user outcomes.”

Enabling ARTs/Teams

“The purpose of an enabling [ART]/team ... is to help stream-aligned teams acquire missing capabilities, taking on the effort of research and trials, and setting up missing practices.

The end goal of an enabling [ART]/team is to increase the autonomy of stream-aligned teams by growing their capabilities with a focus on their problems first, not the solutions per se.”

Platform ARTs

“The purpose of a platform ART is to enable stream-aligned ARTs to deliver work with substantial autonomy.

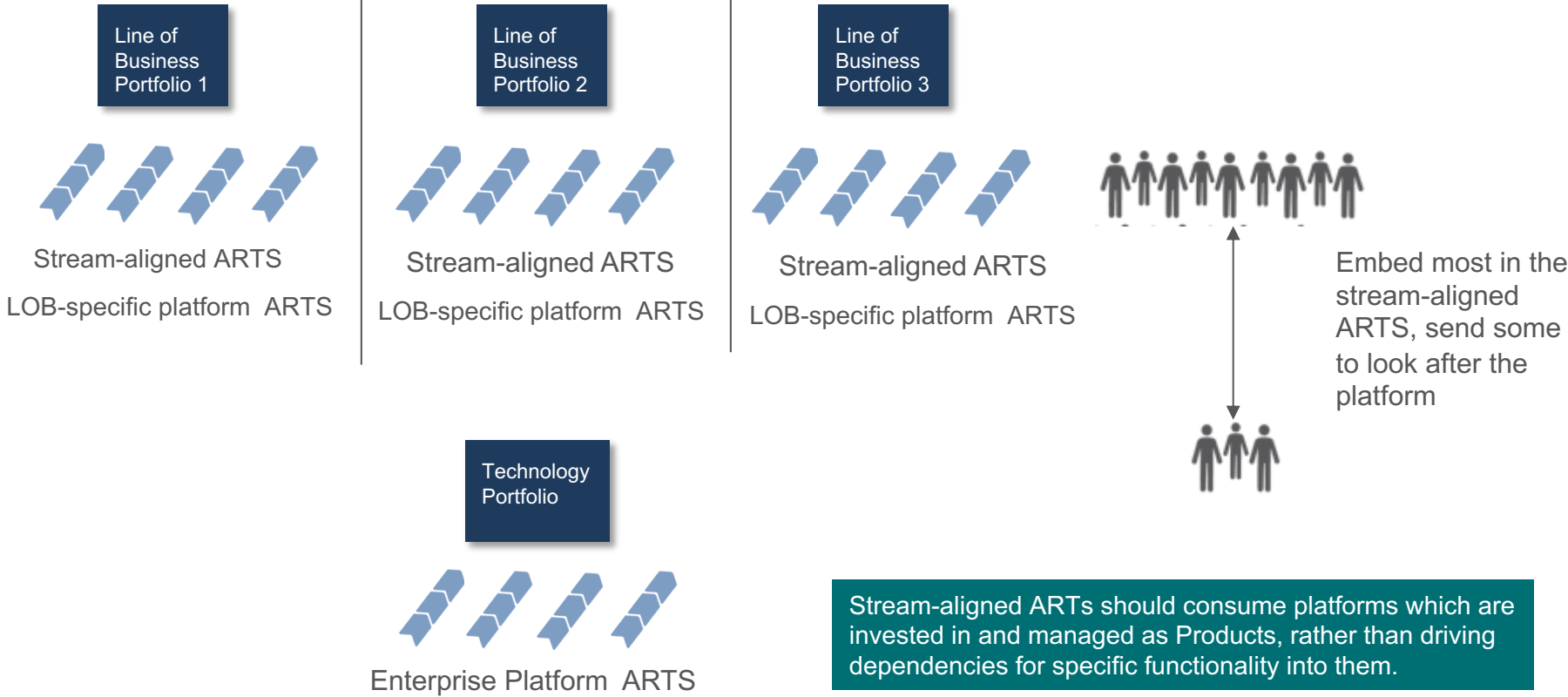
...

In all cases, we should aim for the thinnest viable platform (TVP) and avoid letting the platform dominate the discourse”

Complicated Subsystem ARTs/Teams

“A complicated-subsystem team is responsible for building and maintaining a part of the system that **depends heavily on specialist knowledge**, to the extent that most team members must be specialists in that area of knowledge in order to understand and make changes to the system.”

Evolve to a Team Topology Based Target Structure



Leveraging the System-level insights of the Portfolio

By this point you have a lot of historical data about inter-ART, inter-solution, inter-portfolio dependencies. Use this as to inform your new target structure.

Executive LACE ownership needs to transition

In *Escape Velocity*, Moore describes 4 types of leader: consider these applied to the technology adoption lifecycle of your SAFe implementation

Early Adopters and the Bowling Alley

The Tornado

Main Street

Visionary Inventor

Pragmatic Deployer

Conservative Optimizer

Phase Transitions

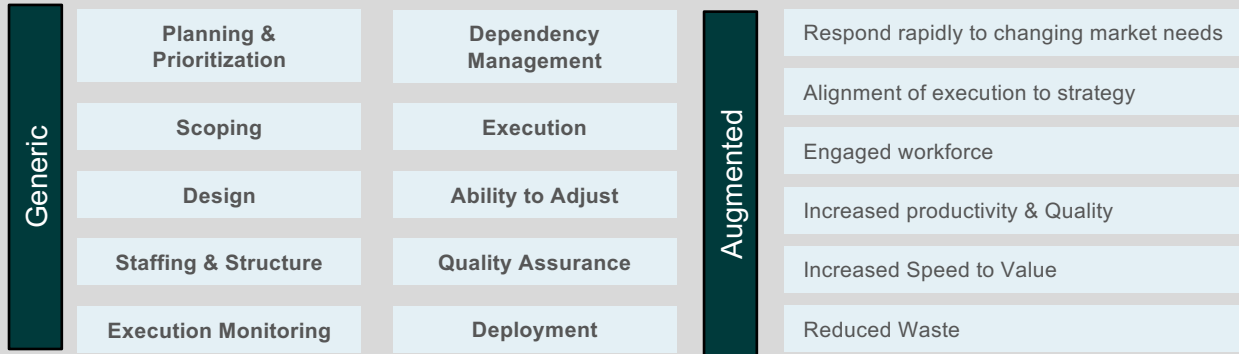


Pragmatic Orchestrator

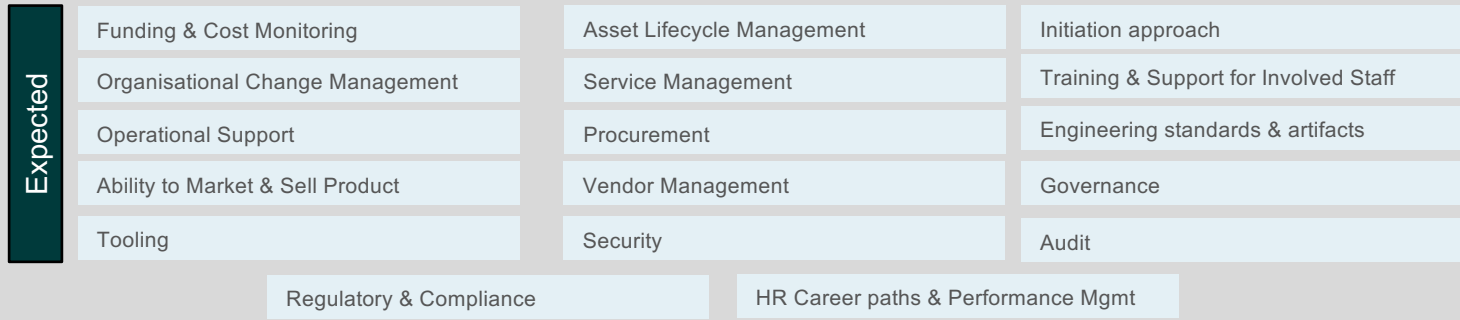
Pragmatic Orchestrator

The composition of your LACE enabling team needs to evolve

Your early LACE team dominantly draws on skills related to the Generic and Augmented Product



As you chase the “whole product” you need the specialists in the LACE team who can deal with the gaps in the Expected Product



And a closing thought

The most important differentiating aspect of the whole product is “value” – whether in relation to speed or productivity. You have to be able to prove this and “BV” only gets you so far

Every market segment you solve for has to get to a discipline around expressing and monitoring ‘value’ that can relate to the P&L, Balance Sheet or Share Price.

“Customers don’t buy products or services; they pull them into their lives to make progress.”

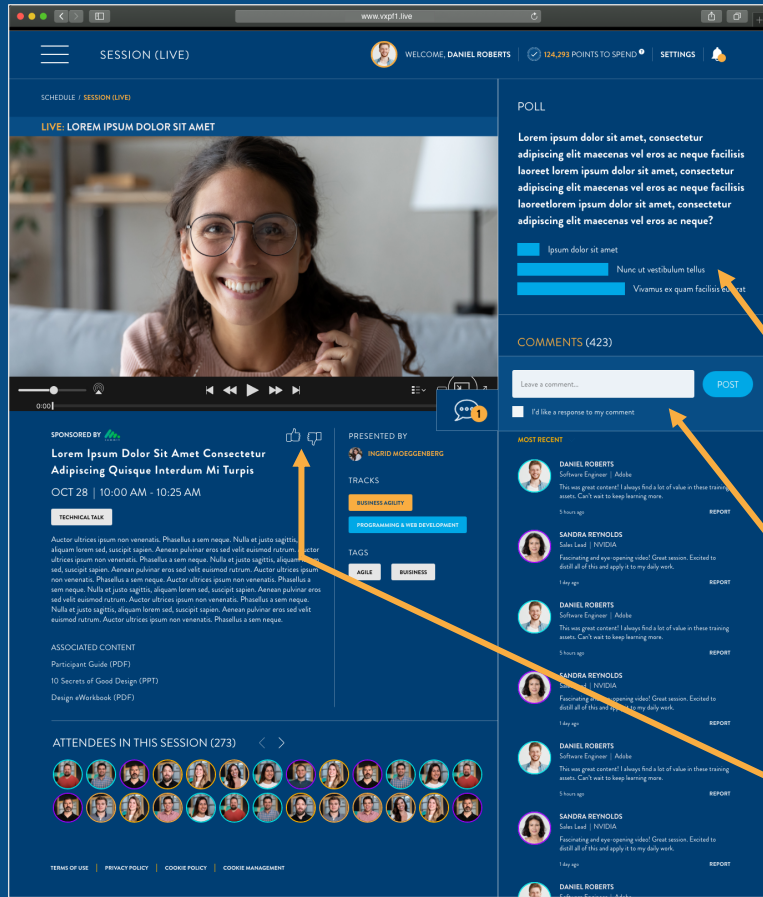
- Clayton Christensen, Competing against luck

Questions

Join me at the Meet the Speaker Session!



Please refer to the agenda for scheduled times



Participate in polling, post comments, and rate sessions

1

Polling

2

Comment

3

Thumbs up or down

Thank you!