

*John Blanco*

# The Fast Track Guide to SAFe Implementation

The Fast Track Guide is a “get things going” handbook that will help you run a SAFe pilot program, identify the challenges you hope to overcome, and set realistic goals for launching a solid SAFe implementation.



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publishing

*About the Author*

## John Blanco — Enterprise Agile Transformation Leader

John Blanco is a Technology management professional with a proven track record in aligning IT strategies to business objectives and delivering innovative solutions across business disciplines. As an accomplished strategist in portfolio management, systems design and implementation, product development, and business communication, John utilized his skills across numerous industries and Fortune 500 companies. These include [NBCUniversal](#), [Scholastic Inc.](#), [Direct Brands](#), [Merrill Lynch](#), [iCentral Corp](#), [Alliance Consulting](#), [OpenMetrik Inc.](#), [Cablevision](#), [Alyn Hospital](#), [ORC](#), [EMI](#), and [ADP Brokerage Services](#).

*Contents*

<b>About the Author</b>	<b>2</b>
<b>Introduction</b>	<b>3</b>
<b>The SAFe Implementation Roadmap</b>	<b>4</b>
<b>Fast Track Roadmap</b>	<b>5</b>
1. The Tipping Point	6
2. Create the Coalition	7
3. Create the Guiding Vision	8
4. Communicate and Begin Training Leaders	10
5. Empower Others	11
6. Pilot Launch	12
7. Launch and Execute the ART	14
8. Extend and Expand	18
<b>Conclusion</b>	<b>20</b>

# Introduction

A SAFe Implementation is as easy as ABC.

**NOT!!**

Implementing a scalable agile framework in an organization is never a one-size-fits-all journey. Every company is different, with uniquely challenging cultural factors, values, and processes. Many of the problems that companies face seem similar on the surface, but after accounting for our different business objectives, cultural contrasts, and the disparate markets we serve, you can see how a “cookie cutter” approach just won’t work. Implementing a methodology, which touches people and technology, requires finesse and careful preparation.

SAFe is no different. It offers good practices and guidelines for solving the problems we face during an enterprise transformation, including:

- Delivering valuable products into the hands of our customers faster

- Raising the level of quality in the things that we build
- Establishing a strong base for cross-team and system collaboration
- Providing transparency where it’s needed most to successfully align goals and measure for feasibility, capacity, and the capabilities of our organization
- Assuring that innovation gets baked back into the machine

This guide won’t sell you on SAFe. It’s not supposed to. But the fact that you’re reading it already says you’ve considered it (or selected it) as a viable solution. **This handbook helps the courageous among you, who want to start as quickly and safely as possible (small “s”), gain workable traction, see real results, and validate your decision to jump**

**on the SAFe train sooner rather than later.**

This Fast Track Guide is a “get things going” handbook that will help you run a SAFe pilot program, identify the challenges you hope to overcome, and set realistic goals for launching a solid SAFe implementation.

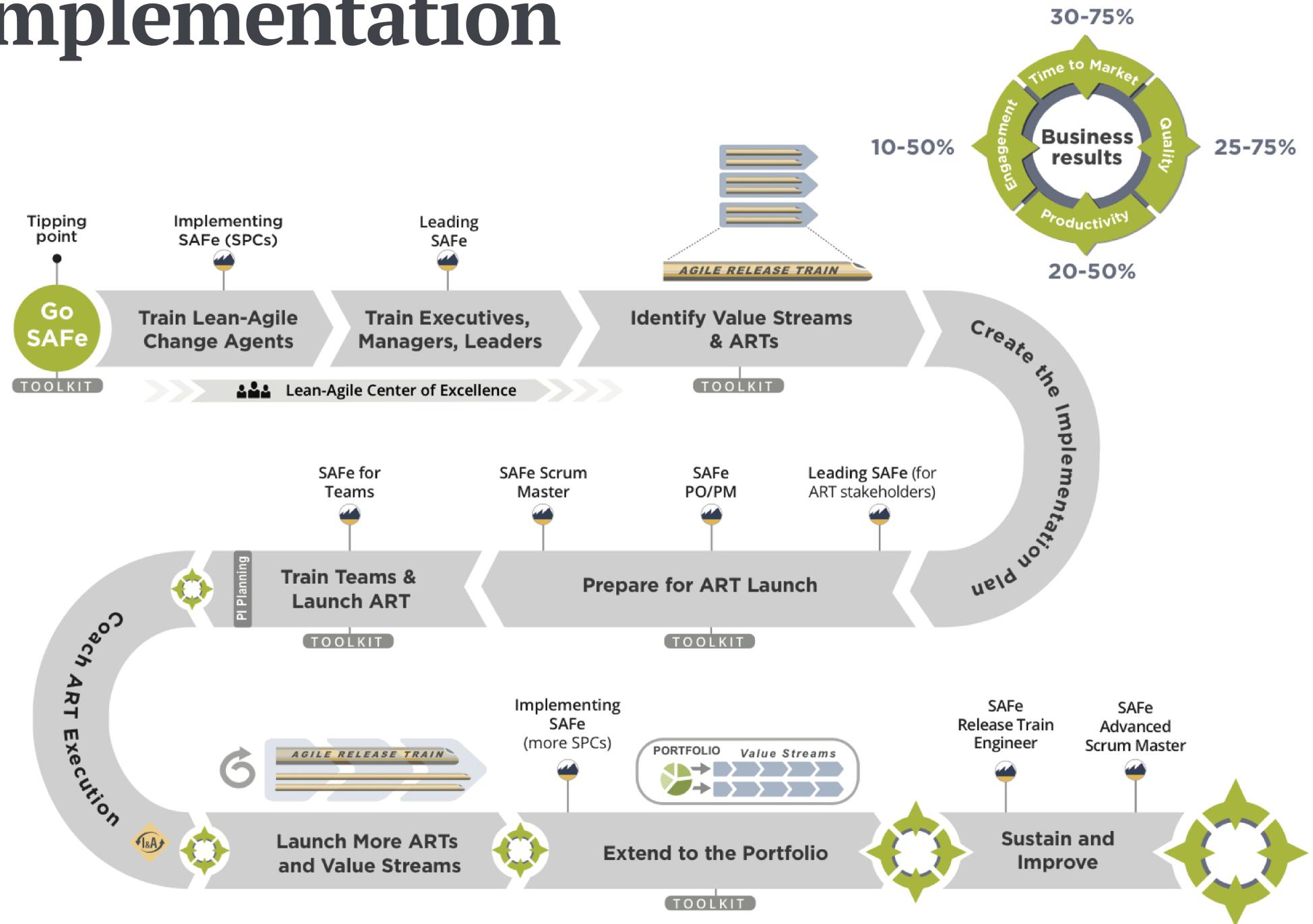
This is no replacement for the [Implementation guide published on the SAFe website](#), which is the most thorough step-by-step guide out there. And even after reading this, I strongly recommend, if you haven’t done so already, that you read the articles that make up the full SAFe Implementation compendium.

Is it as easy as ABC at this point?

Not quite. But it will be easier to scale SAFe further, at your own pace, to whatever level you wish to go.

# The SAFe Implementation Roadmap

We've referred to this a few times already so let's take a look at what SAFe provides as the steps for an effective implementation.

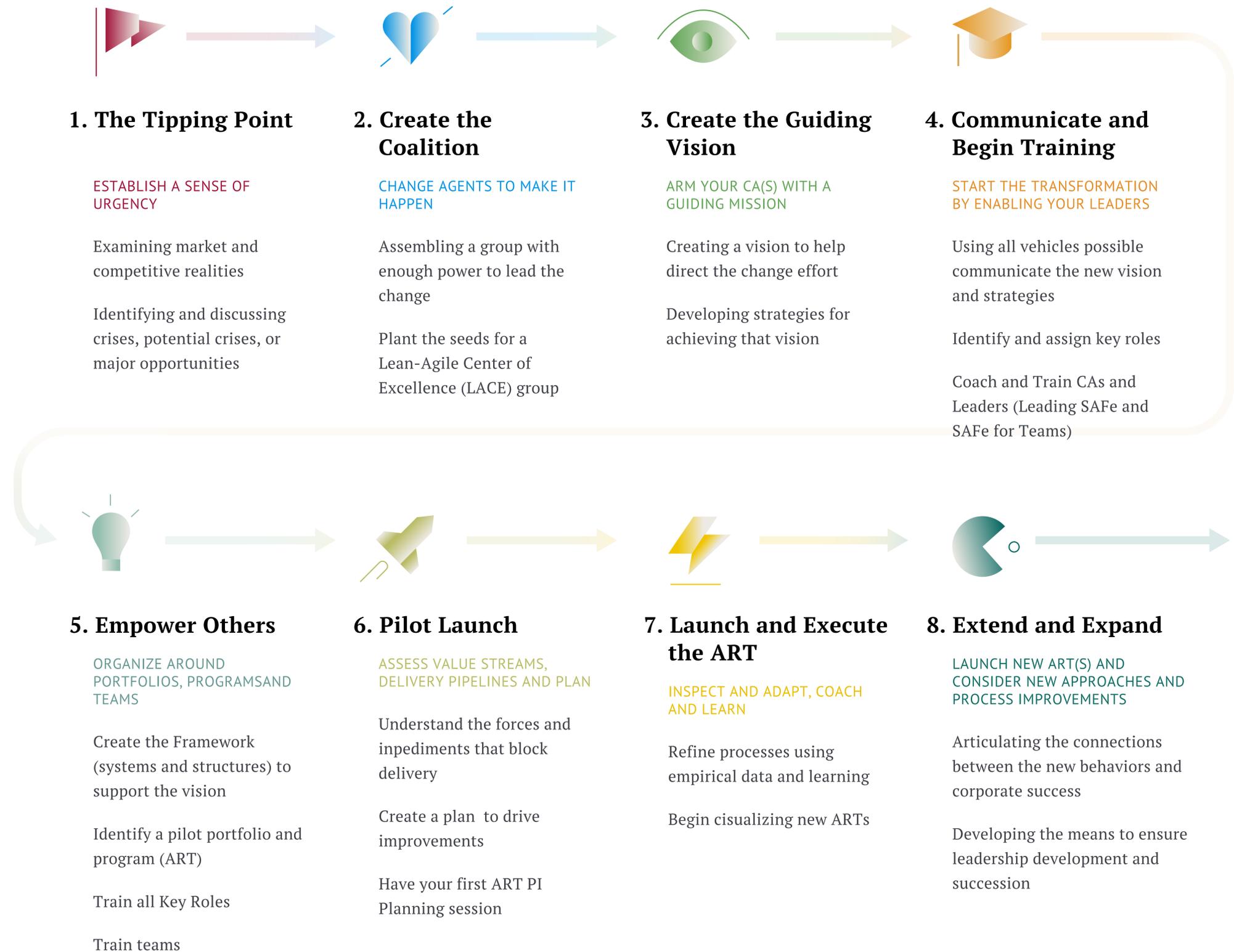


# Fast Track Roadmap

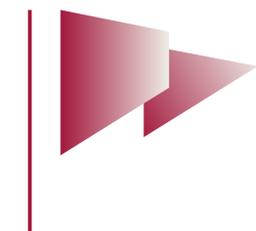
While a longer term SAFe implementation can take many months, a Fast Track provides a Proof of Concept approach.

We perform several of the above activities in smaller increments as we work toward our milestones.

As you can see, each builds upon the other to create momentum and lay a SAFe foundation to expand from in the future.



# 1. The Tipping Point



The SAFe Roadmap starts with this step, as does our Fast Track version. It is critical to establish the importance of our activity. We must show a valid business reason that aims to improve our processes in a way that delivers more value.

At some point, every company reaches a **Tipping Point** — *an event, or series of events, that require rethinking of business operations.*

SAFe looks at common tipping points:

- **Burning Platform** — a product that is failing in the market or a threat from a competitor.
- **Proactive Leadership** — smart, proactive thinking by management. Shrewd and

innovative business people want to stay ahead of the curve. They realize that change is good and maintain a healthy sense of danger. Obstacles comes in many forms, so being vigilant and keeping an eye on the horizon helps us remain at the top of our field through competitive advantage.

## **Actions:**

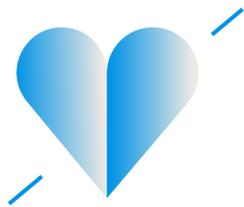
Whether due to an external threat or a proactive nature – it's critical that management conveys the reasons for entering a state of transformation.

1. **Do a SWOT analysis (Strengths, Weaknesses, Opportunities and Threats):** Look at the organization with a critical eye. Interview the leaders and key people of the organization and learn what is needed. The results of a SWOT analysis help to identify our strengths and weaknesses, which helps drive opportunist

behaviors, undo recognized risks and remove pending threats.

2. **Give a kick-start presentation:** Once you have good data from your discovery, make it known and get feedback. Hold a 1-hour Intro to Agile with SAFe briefing and present the problems you've unearthed. Establish and gain consensus from people on where the problems lie to gain buy-in and allow Agile (and your SAFe Implementation) to sell itself.
3. **Present your findings:** We're not *going Agile* just for the sake of saying we're Agile. There must be a purpose. What problems and challenges do we need to fix? Share your findings to motivate people and most importantly, create a valid **Problem Baseline** that we can measure our Agile transformational progress against.

## 2. Create the Coalition



SAFe directs that although management may recognize existing problems, or have a healthy sense of danger, they rarely can focus on driving the solutions, or making “in-the-trenches” decisions. Therefore, it’s important to form a team that can think and do. We’re talking about visionary leaders who:

- Will build and drive the Transformation Vision. Passionate people, unafraid of adversity, who are accomplished and experienced at removing impediments.
- Are Change Agents. Knowing what to do is one thing. Making things happen is what it’s all about.

- Have organizational credibility. We need people who influence others and are acknowledged and respected by their peers. They must be visible and not shy away from the spotlight. Wall-flowers and fence-sitters need not apply!

Oftentimes, we find that the best people to fill these roles are our trusted consulting partners, internal business and technology leaders, portfolio/program/project managers, architects, analysts and process leads.

### **Actions:**

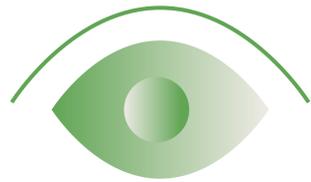
It’s critical to assemble and train the right set of people that will comprise your transformation team. Do the following to get started.

#### **1. Hire or train SAFe Program**

**Consultants** (SPCs), and position them as change agents/coaches.

- 2. Train executives and other managers** on the methods they need to support the transformation (normally through a series of Agile Introductory courses or Leading SAFe.)
- 3. Create a Lean-Agile Center of Excellence (LACE)** or Agile Management Office (AMO) to drive consistent changes across the organization. This group will also govern and sustain the principles of the transformation on an ongoing basis.

## 3. Create the Guiding Vision



Building the coalition and setting a level of purpose for your LACE, not to mention the company at large, is critical to the Transformation. It doesn't have to be an enormous body of work or the Declaration of Independence. Truth be told, total comprehensiveness and precision aren't the goal. A coherent and crisp document that states the ultimate intent is.

Your Guiding Vision document is not a list of design requirements for a final solution, but rather a guide that helps achieve a solution to our problem.

With a Guiding Vision in place, and widely communicated, we start the momentum by broadcasting our intent and gaining the necessary approvals to move forward. Now begins the tactical heavy-lifting.

This is a good place to do Value Stream mapping, Product InVisioning (e.g., Jeff Patton's User Story Mapping), or even a SWOT. If a SWOT was created as part of step one, use it here.

Any combination of the above helps us set up our ART(s) later. If you choose to do Value Stream mapping, use the template that SAFe provides on its site (shown below.)

Operational Value Streams are often easier to grasp because they are almost always identified through the products and services we produce. But some large companies have more complicated value streams to map.

This may be an entry point for the SAFe ritual – **Value Stream Workshop**. If so, hold one.

### Development Value Stream Canvas: [Value Stream Name]

OPERATIONAL VALUE STREAM SUPPORTED



VISION STATEMENT

FOR...  
WHO...  
THE...  
IS AN...  
THAT...  
UNLIKE...  
OUR SOLUTION...

PORTFOLIO STAKEHOLDERS

LPM authorities  
Epic Owners  
Other

PEOPLE AND LOCATIONS

Approx.number of practitioners and geographic locations

SUCTOMER SEGMENT

Identify customer segment served

CHANNELS

Identify the distribution channels affected

ECONOMIC FRAMEWORK

Budget authority  
Economic parameters

SOLUTION

Systems, products, services developed

SOLUTION CONTEXT

...

KPI(S)

...

For solution Trains

ART(S) AND SUPPLIERS

ARTs and responsibilities Supplier relationships



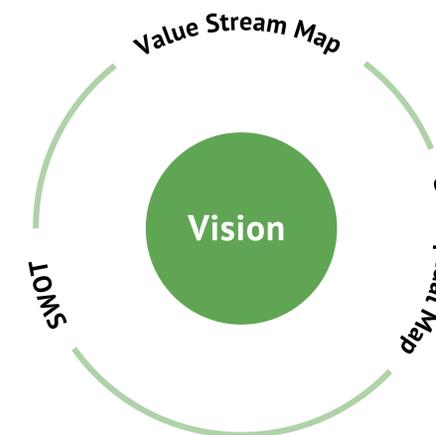
VALUE STREAM ROLES (FOR MULTI-ART VALUE STREAMS)

Solution Train Engineer:  
Solution Mgmt:  
Solution Arch/Eng:

### Actions:

To start creating your Guiding Vision - identify, map and deconstruct **value streams**. Techniques such as Jeff Patton’s User Story Mapping can help a team envision their product(s) or create a **conceptual map**.

If these are out of your reach, simply leverage the **SWOT** you created at the beginning.



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

## 4. Communicate and Begin Training Leaders



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

In Step 2, we created our LACE. Now, we must ensure that these committed transformation leaders have the necessary knowledge, skills and traction for the long haul. This dedicated team comprised of the SPC and two to three sponsors acting as SAFe evangelists, keeps the project on track, isn’t distracted by conflicting agendas and won’t stagnate due to resistance or cultural side-effects.

At this point, we prepare executives and

managers for the changes that are about to happen. We require that management fully grasp their purpose and responsibility in the transformation so that they can be true leaders and not detractors from our goals.

Our motto:

**“THINK LEAN AND EMBRACE  
AGILITY.”**

### **Actions:**

Schedule foundational training for the organization either led by your in-house Agile coaches or an external trainer. Consider these training approaches:

1. **Leading SAFe** – This is the perfect course to set the tone and form a shared understanding for management, i.e., executives, line managers, finance people, product managers, etc. It teaches the

foundational basics of Lean Thinking and the Portfolio and Program levels of SAFe.

2. Depending on the organization’s Agile maturity, preparatory **training courses can help**. SAFe training for the Agile uninitiated is overwhelming. Give team members an Agile primer with:

- Agile 101 (Introduction to basic Agile concepts)
- Scrum Master training
- Product Owner training

## 5. Empower Others



At this point, we have a vision, and senior management is on board and willing to assist with this transformation. It's now time to create teams and **empower the people who will do the tactical work** to deliver end-user value.

A SAFe Team is a cross-functional, highly collaborative group of 5 to 11 people who have the responsibility to deliver a solution or functionality within a given timeframe.

In SAFe, we add the Agile Release Train (ART), which is a team of Agile teams that plans, commits, and releases value together.

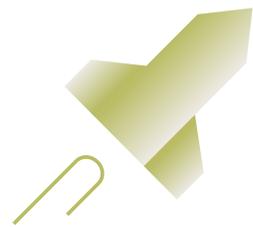
Typically, an ART consists of 50-150 people who are distributed across locations and time zones. When creating an ART, consider the following: leadership support, clarity around products and solutions, team collaboration, and taking on a worthy challenge or effort.

Based on Scaled Agile's explanation, "In SAFe, Agile Teams power the Agile Release Train (ART) and are responsible for delivering larger solution value. No train can exist without its teams. And all teams are on a train, contributing to its Vision and Roadmap, collaborating with other teams, and participating in ART events. In addition, they are largely responsible for building the Continuous Delivery Pipeline and ART DevOps capabilities. The teams and the train are inseparable; the whole is greater than the sum of its parts."

### Actions:

- 1. Define the Teams:** As with smaller Agile implementations, teams consist of product owners, scrum masters and development team members. With SAFe, it can also be necessary to include a Product Manager (PM) and a Release Train Engineer (RTE).
- 2. Train the Teams:** Empower your teams by giving them the knowledge they need to succeed. **SAFe (Scrum for Teams)** is perfect training for individual contributors while **SAFe for Teams** training is helpful for managers.
- 3. Maintain Flexible Processes:** Stay true to the Agile spirit! In SAFe, we give teams the flexibility to choose and blend Agile frameworks -- Scrum, Kanban, Extreme Programming (XP) -- to fit their work style. This empowers the team to flex and align to changing priorities and the business' needs.

## 6. Pilot Launch



With an understanding of our Value Stream and the team we need to enable our ART, we reach a pivotal point in our transformation. Our immediate goal is to make visible short-term wins.

Create a high-level launch plan that identifies key release dates and milestones. Keep it lightweight because the stabilization and coordination of activities is covered during the Program Increment (PI) Planning event.

**Warning:** Resist the urge to get trapped into a hard-set plan. Agile encourages us to inspect and adapt as we go. Kickoff with a plan that identifies key milestones and move on.

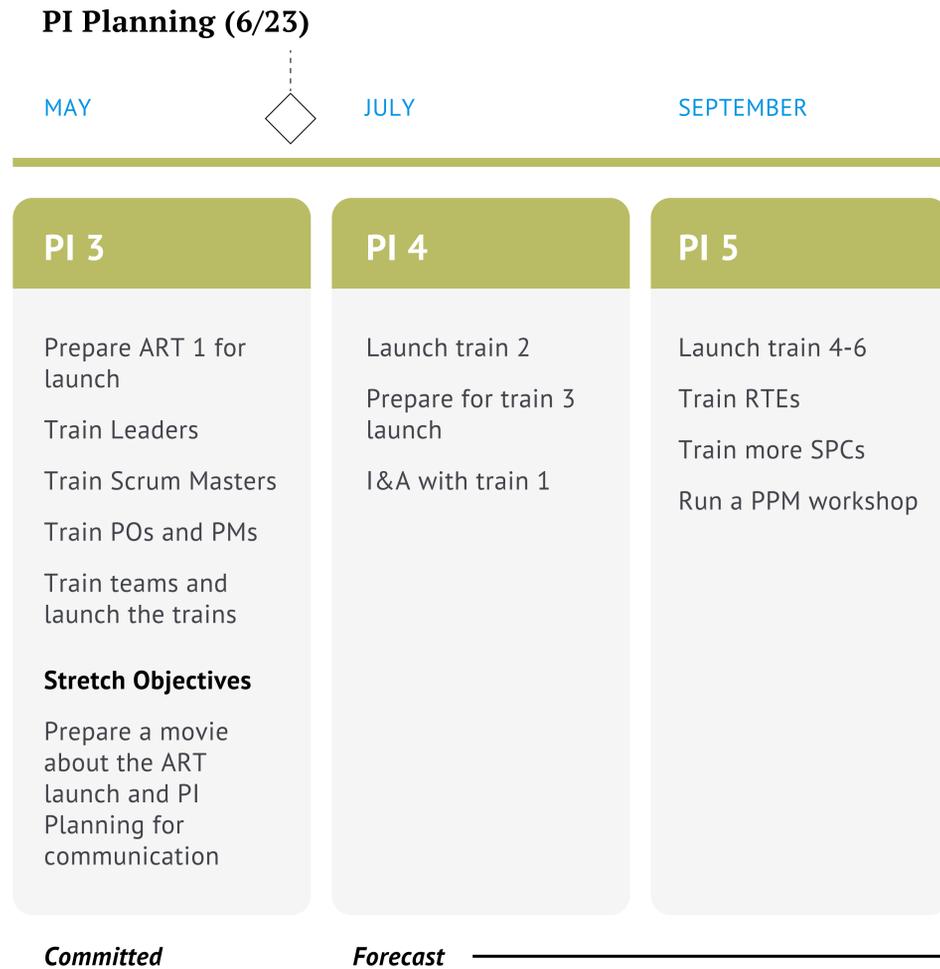
Often when a company is moving from a traditional waterfall process, having a GANTT style document appeases early concerns. If it makes your stakeholders more comfortable, start your product backlogs with traditional Business Requirements Documents (BRDs) that team members can pass around, review and approve. However, once the real backlog is created with epics, features and user stories – trash the BRD. The backlog becomes the new single source of truth.

### What is included in a launch plan?

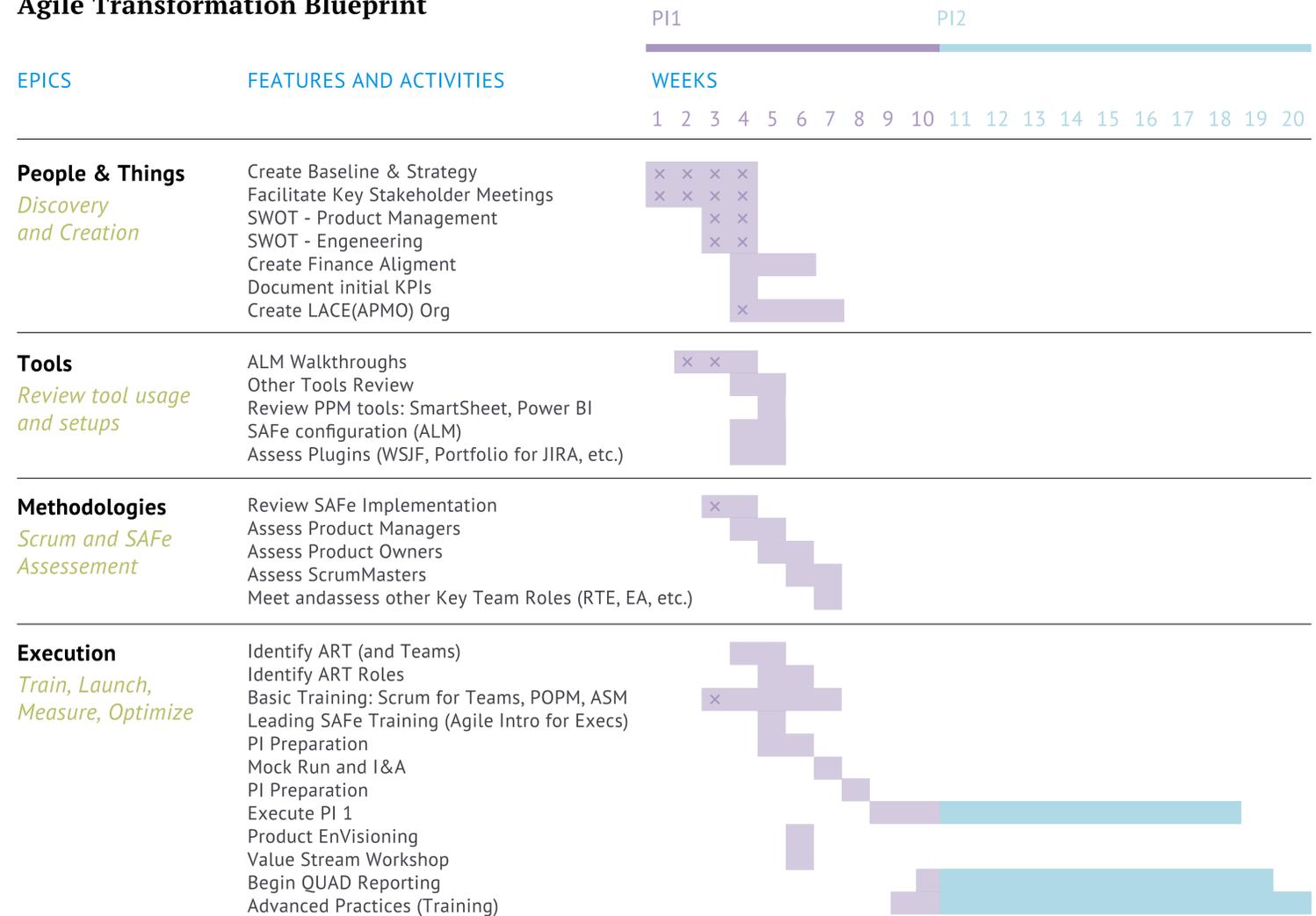
- High level scope of the ART
- Launch date for the PI
- Established and accepted PI cadence
- Training schedule for all ART leaders (RTEs, Product Managers, Scrum Masters, Product Owners, etc.)

- Identification of the ART teams
- ART Launch Readiness Checklist
- Milestones for building the program backlog (features, WSJF prioritization, etc.)
- Schedule of key ART events such PI Planning, system demos, Scrum of Scrums, PO Syncs and end of PI - Inspect & Adapt

In preparation for an ART launch, determine and document expectations for each team. Include expectations for the upcoming PI Planning Session as well as the execution of the PI. Use the format that best works for your team — or use the simple roadmap below. Don't be afraid of imperfection. We learn by doing and the same applies here.



**Agile Transformation Blueprint**



**Actions:**

**1. Create Your High-Level Launch Plan:**

Your launch plan should identify key release dates and milestones. Keep it lightweight because the stabilization and coordination of activities is covered during the PI Planning event.

**2. Facilitate a Mock Run of a PI Planning**

**Event:** With this dry-run, invite key players from each team, their managers, and anyone else who wants to volunteer to test their skills and knowledge of PI Planning before diving into the real thing.

This practice session is usually 4 hours in length. In it, participants try to simulate key events of a full PI Planning session. Use this time to create the Program Vision, PI Calendar and other artifacts.

## 7. Launch and Execute the ART



Leading change within an organization's culture is not a trivial task. We must change people's behaviors, roles and expectations.

**SAFe for Teams** training is perfect for starting this grassroots crusade with the people directly responsible for delivering products and services, and who will be active members of ART development teams. This training is not only important to those new to Agile or Scrum, but also to more experienced team members.

Many of our scaling techniques are not normally found in standard Agile or Scrum, so host this training as a big room event to accomplish the following:

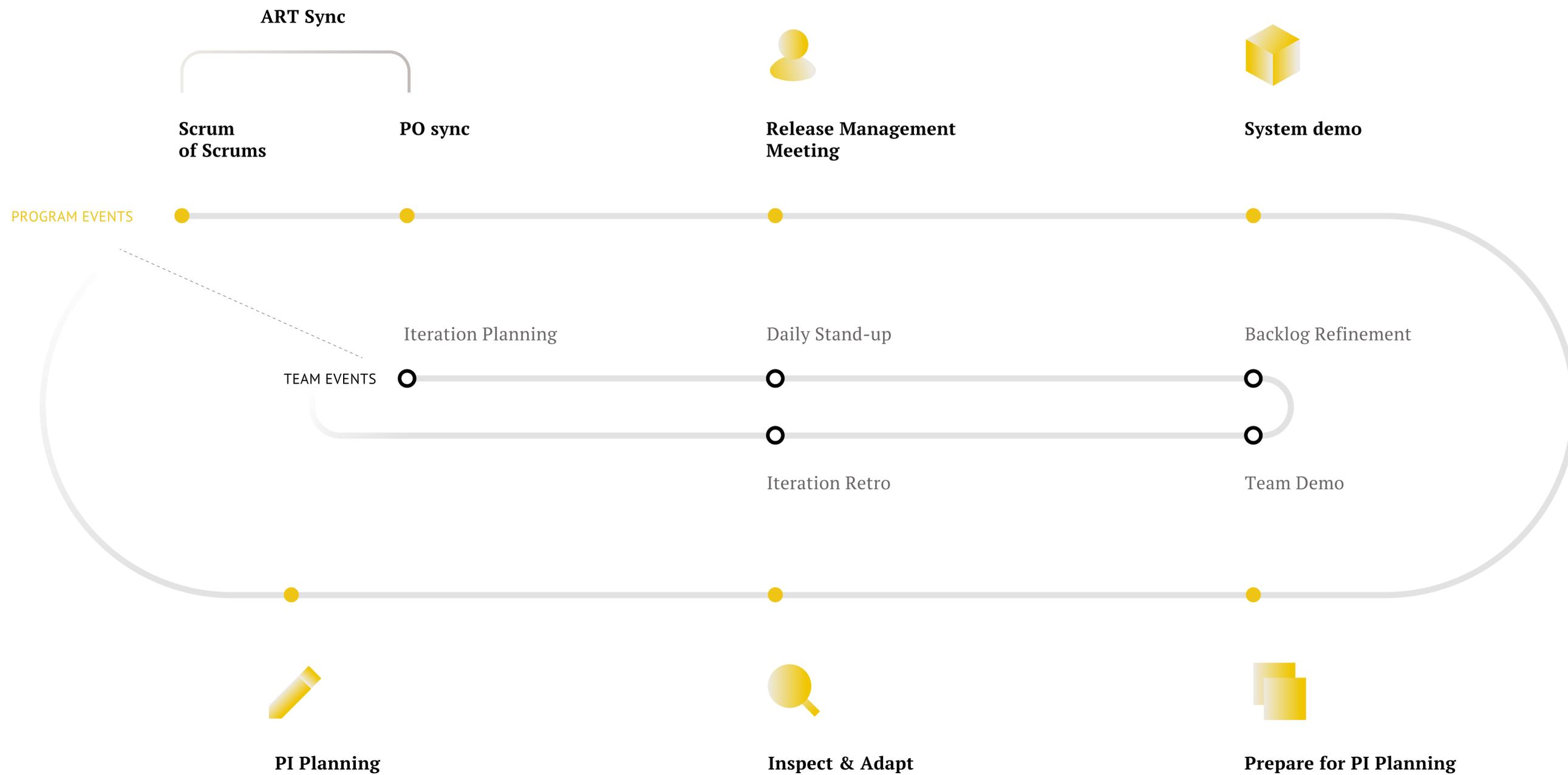
- Allow the teams to fully form
- Enable teams to collectively engage in the learning experience
- Share knowledge around concepts like Epics, Capabilities, Features, User Stories, etc.
- Give teams time to begin forming unique identities

The most critical ceremonies in the evolution of an ART — or possibly a business' entire

transformation — bookend the start and end of every Program Increment (PI). Thoughtfully prepare for and facilitate the PI Planning event to ensure proper execution.

During the execution of the PI there is a full set of Program and Team level rituals that are standard Scrum and SAFe ceremonies (see below).

Fast Track Roadmap / Launch and Execute the ART



## Actions:

It's now time to launch your ART.

1. **Pre-PI planning Preparation:** Ensure proper preparedness. The Release Train Engineer (RTE) works alongside the Product Manager to:

- Collect briefing presentations
- Gather architectural, systems, UX/UI presentations
- Coach and prepare speakers for the event
- Ensure that Features are vetted and prioritized to reduce the risk of surprises

These activities properly prepare the team for PI Planning. Now, let's look at how we move from one PI to the next.

2. **Conduct a Mid-PI Review:** We recommend a mid-PI review around the start of sprint 3. This event includes

Scrum Masters, Product Owners, Product Manager, technical leads, QA leads, a System team representative and is facilitated by the RTE (or SPC).

The agenda of this meeting is:

- Review current (in-flight) PI Features and set delivery expectations. An ART discusses and marks each feature as:
  - On Track
  - In Jeopardy
  - Technical Debt (candidate for movement into the next PI or split)
- Review proposed Features for the next PI

This event allows open acknowledgement of the state of committed delivery, room to make adjustments, and a joint understanding of the feature-load planned for the

upcoming PI. This 2-4-hour meeting better prepares the proposed features (harden acceptance criteria, size, determine distribution across teams and gauge whether it's necessary to add or subtract teams).

3. **Schedule the PI Planning Event:**

This commonly used, 2-day ritual normally occurs during the last week of sprint 5 (assuming 5 sprint PI's). During the PI Planning session, the ART discusses and debates on issues that remain hidden in traditional project methods. Even the event's forced timebox sets the stage for addressing work that is planned, where time is sacred, and contractual commitments to our value stream partners.

4. **Schedule the I&A (Inspect & Adapt) Event:** There is true excitement at the close of a PI when the entire solution (or an increment) is fully integrated and demoed. This super-charged retrospective creates a space for contributors to be a part of the transformation improvement process. Here are a few easy steps:

- **Start with a demo.** At the I&A, start with a full solution integration demo, if needed.
- **Survey the entire ART and review the findings.** Have people answer questions on how they believe the ART performed. Encourage thinking across the domains of Productivity, Predictability, Responsiveness and Quality (PPRQ). This information is the foundation for improvement workshops during the I&A.

- **Hold a Flash Retrospective.**  
Following general discussions around the findings, hold a Flash Retro. It's a quick way to see if something was left hidden in the survey.
- **Brainstorm solutions.** The final portion of an I&A is where attendees break out into the 4 different PPRQ groups. Allow groups to self-organize and prioritize to attempt to find a solution for each challenge. Ask 4 volunteers or assign Scrum Masters to shepherd the discussions within the groups. Conclude with a readout by each group to hear their recommendations. Include the solutions in your upcoming PI.

## 8. Extend and Expand



As the former activities become natural, the transformation continues. In truth, this means...

***“BRING THE PORTFOLIO LEVEL OF SAFE INTO THE PICTURE”***

We have created a new way of doing things. A new way for teams to visualize work and measure their flow. We have brought other areas of the organization into play. This now creates momentum that impacts the Portfolio level, where ideas first arise, are judged and ultimately funded.

We must be sure that we can adequately manage capacity, have better ways to cost account, apply value add Agile techniques, improve our ROI projection methods, strengthen our vendor management and mitigate our risks.

This is often where a strong Lean-Agile Program Office (PMO) takes charge and ensures that our transformation continues to take root, grow and mature.

For example, a PMO will:

- Lead overall improvements
- Continuously align our Value Streams and new Value Streams
- Maintain enterprise value flow
- Implement Lean financial management and budgeting techniques

- Align demand to capacity
- Provide reliable Agile forecasting

All for the purpose of evolving the organization to leaner governance practices.

This appears to be the last step in the process, but it's actually the **first step of a new journey**. Here, we reap the benefits of what we've started and employ them to make changes throughout the organization.

Other teams within the organization may not understand what we've accomplished. Expanding into associated areas like HR, Operations, Legal, Finance, Accounting, Sales, Marketing and more is a good thing for the entire organization.

In the real world, many companies see Agile Transformations as a way to tighten the delivery pipeline and ship products faster. Some believe that Agile has little impact on the company's objectives, priorities, or direction. Unfortunately, this is short-sighted, for Agile has benefits across all areas of a company.

### **Actions:**

Use these methods to win executives and business captains over to Agile Portfolio thinking by offerings items such as:

1. **Schedule Agile Introduction or Agile 101 sessions:** Help leadership drive your ARTs, and ancillary departments, like HR, Marketing and Finance to better understand what Agile truly means for them.

2. **Host Leadership Refreshers:** Consistently evangelize the importance of Agile leadership. Host Leading SAFe and Agile intros across the company.
3. **Host Scrum and SAFe Refreshers:** Take the **SAFe for Teams** course and reduce it to a 2-hour refresher class or even a Lunch-n-Learn.
4. **Plan Metrics Awareness Workshops:** If you've introduced new metrics, hold sessions to help managers size initiatives' progress in an Agile way, mitigate risks and create KPIs to measure 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 product teams are a win-win for the entire company. Share the joy!

*Conclusion*

# Conclusion

We've come a long way and it all starts with a high-level goal for launching an Agile Transformation. By this point, we have learned that the journey has had us apply some incredible and far-reaching steps that impact our entire organization.

As much as I believe in the value of all this, when we start to move beyond our comfort zones or business domains, keep in mind: if you've applied it and proven it works – it's okay to be confident. Always take heart in knowing that building strong and purposeful relationships will take you further than trying to blaze the path alone.

**Transformations need allies. A lot of allies.**

Thanks for reading from [John Blanco](#) and the team at [Targetprocess](#)!

Here's a checklist to keep on hand during your SAFe Implementation:

STEP		ACTION	OUTCOME
<b>1. The Tipping Point</b>		Do a SWOT Kick-start Presentation	Examine market and competitive realities Identify and discuss crises, potential crises, or major opportunities
<b>2. Create the Coalition</b>		Hire the right people Train your executive body Create the LACE	Assemble a group with the power to lead the change Plant the seeds for a Lean-Agile Center of Excellence (LACE) group
<b>3. Create the Guiding Vision</b>		Value Stream Mapping Conceptual Mapping	Create a vision to direct the change effort Develop strategies for achieving that vision
<b>4. Communicate and Begin Training</b>		Leading SAFe Agile 101 and Intros Scrum Master training Product Owner Training	Use all vehicles possible to communicate the new vision and strategy Identify and assign key roles Coach and Train your Leaders (Leading SAFe and SAFe for Teams)
<b>5. Empower Others</b>		SAFe for Teams training	Create the Framework (systems and structures) to support the vision Identify a pilot portfolio and program (ART) Train all Key Roles Train teams
<b>6. Pilot Launch</b>		Create a Plan Hold a Mock PI Planning	Create a plan to drive improvements Prepare for your first ART PI Planning session
<b>7. Launch and Execute the ART</b>		Pre-PI Planning Mid-PI Review PI Planning Inspect & Adapt	Refine processes using empirical data as you go Collect and publish metrics Begin visualizing new ARTs
<b>8. Extend and Expand</b>		Agile Intros Leadership Refreshers Scrum & SAFe Refreshers Metrics Awareness Workshops	Articulating the connections between the new behaviors and corporate success Nurture and grow Develop the means to ensure leadership development and succession