



eraneos

Whitepaper

**Unboxing SAFe®**

How to successfully  
implement **Scaled Agile**

November 2022



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## Introduction

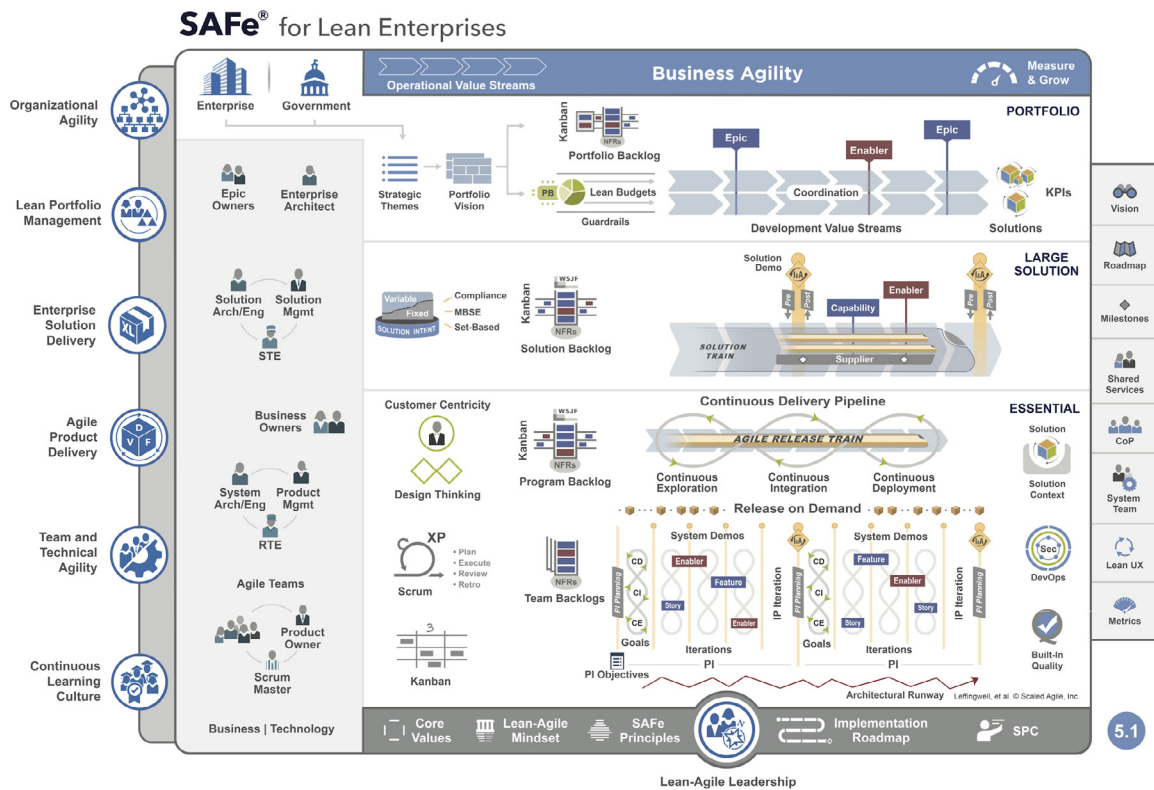
“Disrupt before you’re disrupted,” is a catchphrase heard in every sector. Technological developments are occurring one after another at an increasing pace and they are changing our life as a person, a customer and an employee. In turn, to survive, enterprises have to change their way of working. Disruptors in the market have mastered agility by creating innovative ecosystems to embed it across the entire organization: from ideas to product development and all the way through to release and support. The result? Their products reach customers in several hours, days or weeks instead of months or years. This allows them to increase their market share, reduce costs, achieve higher customer satisfaction and thus stay ahead of the competition.

### Why this whitepaper on SAFe®?

Many organizations already work with successful scrum teams. These teams are able to do even more when the rest of the organization works with the same level of agility. Success can be achieved if the whole supply chain is optimized in an agile way and the value stream as a whole is coordinated. SAFe (Scaled Agile Framework) is the most popular agile scaling framework. It was recently given a major update to clarify what business agility means and how you can achieve it. Many organizations are facing the question of how to implement SAFe successfully.

This whitepaper is aimed at CIOs and their teams who want to scale up from ad-hoc agile working to always agile. The desired result is to enhance agility by increasing predictability and getting rid of complexity. We take you through all the steps of the SAFe® Implementation Roadmap, and we examine how to complete each one. This whitepaper provides you with knowledge you can immediately apply as well as hands-on information about implementing the SAFe framework.

Figure 1: SAFe® framework



SAFe can help you resolve these problems. First and foremost, it ensures uniformity. It helps you to structure and clarify roles and responsibilities. More clarity will also be created regarding agreements, for example on how often meetings should be scheduled. In this way, you create rhythm and synchronization which means you can deliver value to your customers in a more predictable and customer-centric way. Moreover, SAFe also ensures tighter integration of business and IT: you need both components to create this value.

## Why SAFe®?

An organization doesn't get started with SAFe out of the blue. You choose it because something is going on within your organization. For instance, your competitors are achieving their goals and you're not. Two aspects are often mentioned.





## SAFe® Implementation Roadmap

The SAFe Implementation Roadmap describes the steps you can take in order to implement SAFe successfully. Experience has shown that agile is often initiated bottom up. Although this is a proven successful change strategy, implementing SAFe successfully also requires leadership commitment. In the roadmap, the organization starts at the top and ensures there is management support from the outset so that the organization can actually get down to work.

Based on this support, we can then look at how to identify a number of value streams. These value streams serve as the basis for determining which teams will participate and subsequently be trained. This is a continuous process in the roadmap. Right at the end of the roadmap, you see the word “accelerate”. From that point, you move faster. We always advise organizations to start small. It’s not necessary to implement SAFe across the entire organization straightaway. Start in a low-risk area that is nonetheless highly visible in the organization so that you can immediately celebrate the successes you achieve there.

At the bottom of the Scaled Agile Framework diagram (see Figure 1) it says that an organization needs to have a lean-agile mindset. This is one of the foundation elements of SAFe. If you don’t get that right, it will be very difficult to set up the rest of the framework and make your organization agile.

### Coaching is a prerequisite

There is a real need for coaching, especially at the start of a SAFe transformation. A SAFe Program Consultant (SPC) engages with the stakeholders in the change. This person leads the lean-agile transformation. Moreover, it’s vital to ensure that you have several Agile/SAFe champions in the organization: people who know all about it and who will guide the organization on its journey.

## Where do you start?

It costs time to make your organization future proof. And you won't see the results of the journey in just a few months. Rather, it will take some three to four years. Where do you start this journey?

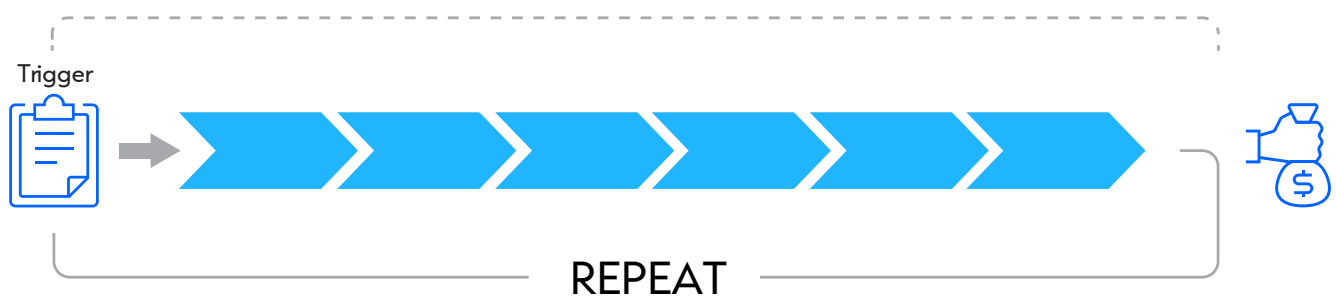
- Look for the problems the organization is running into. If there are scrum masters/coaches present, let them help you identify where the organization stands and what the biggest burning platforms are.
- Identify who the stakeholders in the change are. Often, people only think about IT in this regard. Check if management is aware of the problems.

- Organize an in-company Leading SAFe course to discuss the problems and examine the way forward. You can use many components of the framework straightaway without going 100% SAFe immediately.

## How to identify value streams

A value stream is a series of steps your organization uses to create value for its customers. How do you identify these value streams? How do you set up your organization around these value streams? What can these value streams mean for your organization?

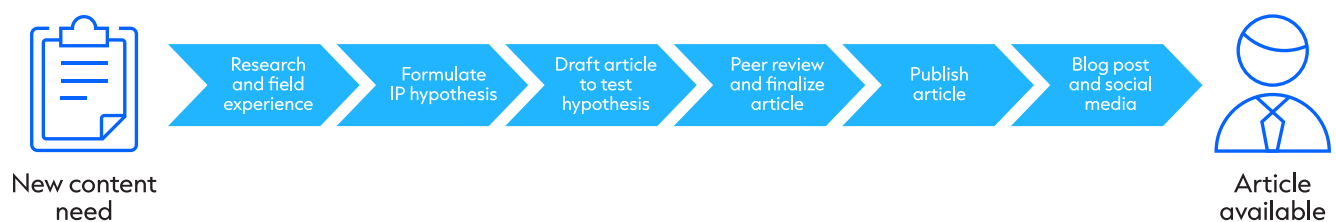
Figure 3: The anatomy of a value stream



We introduced the SAFe Implementation Roadmap in the first part of this whitepaper. After identifying the tipping point and creating a Guiding Coalition, it's time to identify value streams.

With value streams, you ensure that continuous flow is created in the organization so that you can continuously create value for your customers.

Figure 4: Example of an operational value stream



## Value streams and continuous flow

We've known that flow is important in an organization ever since Lean first appeared on the agenda. Why do you want your organization to revolve around value in order to achieve this flow?

- Fewer handoffs. You have fewer transfer moments so that you can deliver value faster.
- Easier to build in quality. If you want to scale up, it's very important that you start at the lowest level – at the team or even individual team member level – and that everyone knows how important quality is.
- Easier coordination between the business and software development. If you organize around a value stream, you cannot help but allow these two to collaborate.
- Optimizing the system as a whole. You calibrate all the cogs and wheels in your organization and ensure that you optimize the entire chain and with that, optimize the whole system instead of optimizing parts. Not every value stream works equally well for every organization at every given moment. You have to repeatedly choose which value stream to use. The Scaled Agile Framework has various built-in quality practices you can use to think about the optimal value stream for the customer involved.

## Identifying value streams and creating agile release trains (ARTs)

Broadly speaking, the following five steps are used to identify value streams for your customers.

**1.** Identify operational value streams. Where do you make your money? In this regard, you ask a fundamental question: what is it you actually do for your customers?

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**2.** Identify the systems that support the operational value streams. For example, CRM systems, databases, websites, ordering portal, an API connected to a courier, invoicing system, etc.

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**3.** Identify the people who develop these systems. Here, don't examine current practice, but rather move away from it. Look at who – at the individual level – works on the systems.

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**4.** Identify the development value streams. This involves building the systems that support the operational value streams. This makes these development streams just as important as the operational value streams.

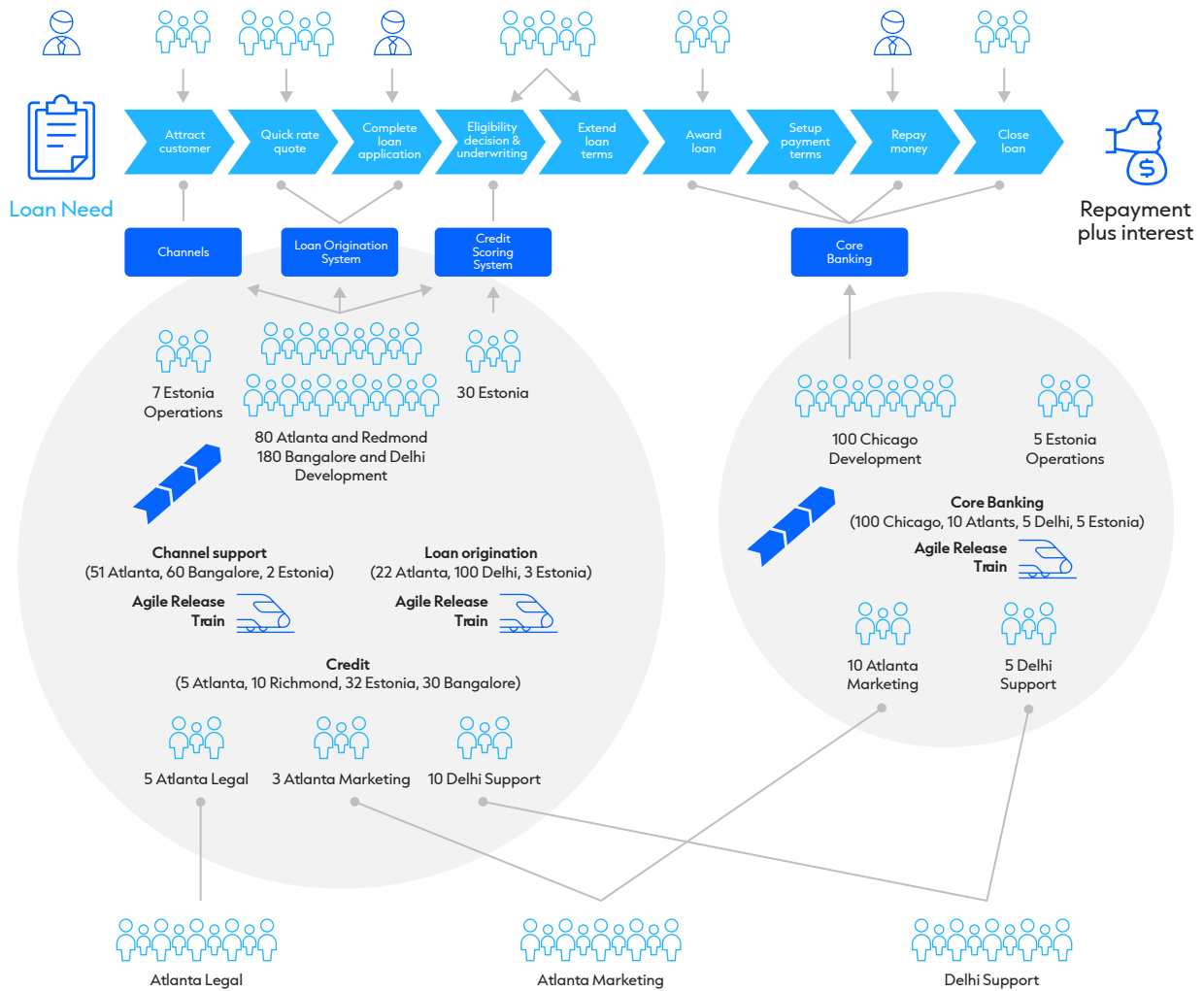
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**5.** Create agile release trains (ARTs) based on the value streams. These trains are the tools for adding value.

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**Figure 5: Development streams support operational value streams**



If you follow these steps systematically, it may be the case that you discover your current team composition is not well suited at all to the task of identifying operational value streams. This means that you will probably have to move away from your existing structures. It's a big challenge, but meeting it will deliver you a lot.

Each ART is a virtual organization that is capable of continuously delivering value to your customers with shorter lead times, ultimately making you much more predictable. An ART consists of a minimum of five teams and a maximum of twelve teams (or 50 to 125 people in total) roughly speaking. Once you have

determined how many people are working on particular systems, you can work out how many trains you need.

Starting small is important here too. Perhaps it's best not to start with the most important, most impactful, most innovative value stream. It's often better to tackle a less crucial goal first and see how that works out. Showing the added value of working in ARTs is perhaps one of the most important objectives in the change process.

## The do's and don'ts of working with value streams

- Many organizations use their existing organizational structure and immediately start applying SAFe. That doesn't have to be a problem, but it's good to be aware that this is your starting point and that from here you will be looking at what the real value streams are, and how you can better structure your organization with the focus on adding value.
- It can be difficult to let go of what is familiar. But, once you start doing so and slowly get better at it, you won't fall back into fixed patterns anymore.
- Make sure you organize a workshop with the right people and invite everyone involved: not just the board or management, but also people from the work floor and maybe even customers.
- A single Value Stream workshop is not a guarantee for an organization for the next hundred years. It's a good idea to re-evaluate once every six months and make small improvements.
- It's sensible to start small. The question of which process steps are the ones in which you make money is in itself a very complex one to answer. That's why it's best to start with a value stream in which change is highly visible, but doesn't turn everything upside down. This makes it much easier to have a discussion.

## What can you do?

How do you apply all this theory directly into practice? The following are the first steps on the path to success.

**1.** Identify the stakeholders needed to arrive at an initial meaningful value stream analysis. For example, enterprise architects, customers, users, subject-matter specialists.

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**2.** Hold several trial workshops with different stakeholders to gain insight.

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**3.** Go on company visits to show stakeholders what value streams can do for an organization.

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## Creating a SAFe® implementation plan

A SAFe implementation plan is not a plan for the long term in which nothing is allowed to be changed. Rather, it's a short-cycle process in which you should encourage – rather than prevent – experimentation and mistakes, in the best agile tradition. Earlier, we showed you what value streams are and how to identify them. But how do you put working with these value streams into practice? How do you create an implementation plan that will create incremental organizational change?

## Incremental plans

When drawing up an implementation plan, many people have the idea that it's a complete plan for a fixed period of several years. In the case of SAFe implementation plans, we choose to do just the opposite: instead of making long-term implementation plans, it's good to plan and evaluate incrementally. For example, planning/replanning and evaluating every quarter by following the PI Planning calendar. This has two advantages for organizational change:

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**1.** The cycles are short. Every quarter, you evaluate and change course if necessary, instead of being tied to a particular date.

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**2.** As a change team, you adopt a routine that has the same rhythm as the teams that will work in the ARTs. In doing so, your behavior sets an example for the rest of the organization to follow.

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You can extend the train metaphor to the fine details by introducing a SAFe Implementation Railway, complete with marshaling yard and all. The railway also shows the transformation backlog. This makes coming changes visible as well as what has priority and when you're ready for the next step.

## Who gets what training and when?

The launch of the first ART is crucial. In this regard, it's essential that you start training leaders so that they are fully aware that the organization is undergoing change.

But this involves more than just leaders. You also have to look to product managers, architects, product owners and scrum masters. There are training courses for all these roles. In addition, it's sensible to think hard about which people you send for training. Make sure that at least the people who will actually fulfill these roles receive the proper training.

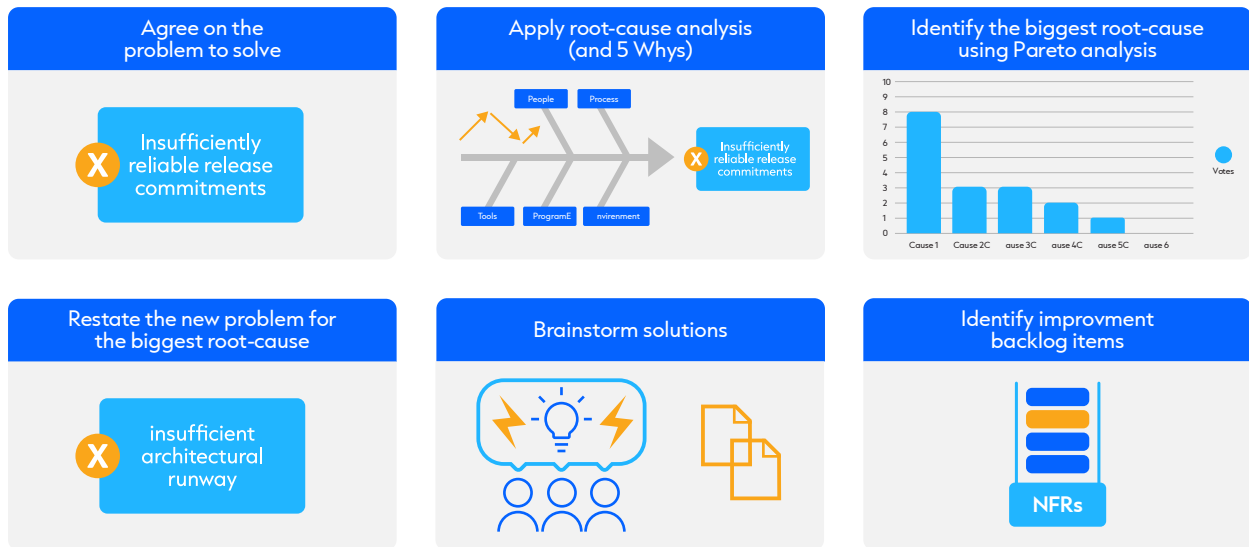
We've talked about choosing value streams and what training you can provide for people. What is very important in such implementations is that you work with SAFe Program Consultants (SPCs), preferably a mix of internal and external people.

## PI Planning and Inspect & Adapt sessions

PI Planning sessions are essential for synchronization purposes as well as to see what the results are. They provide teams with guidance and answer the question: what will the ARTs be working on in the coming period? Usually, PI Planning sessions are held face-to-face, but they can just as easily take place virtually.

Inspect & Adapt sessions are major milestones. During these sessions, you determine whether the goals have been achieved and if the solutions devised are actually working. Along with PI Planning sessions, Inspect & Adapt sessions are another important moment in a SAFe transformation.

**Figure 6: Problem-solving workshop format**



During a Value Stream workshop, you and senior management determine the objectives of the first PI Planning session. At the Inspect & Adapt session, you assess these objectives and create the agility flywheel for the rest of the organization. At this point you can also gather new input for the implementation plan.

When you move forward with a SAFe transformation, every new value stream and ART must go through these same steps. You’ve drawn up a plan, identified the next value streams and decided on the related ARTs. You then repeat the entire process and hopefully this time you won’t make the same mistakes you made before.

### What is the next step?

Holding Value Stream workshops and moving on to the first PI Planning session is quite difficult in practice. In general, it’s better to just start and learn as you go rather than to sit at the drawing board for too long. We all make mistakes and it’s best to do so as early as possible in the process.

## Connecting the organization to SAFe®

**When a SAFe implementation starts to take shape, you will have to deal with new roles. What roles are needed and which people in the organization are eligible?**

The roles involved in a SAFe implementation differ from those in a traditional organization. They are less defined according to hierarchical principles and they can change over time. Defining new roles can be a sensitive issue in an organization. It can cause anxiety and concern among staff. There is a risk of rumors and misinformation creeping into the organization and in the worst case this could lead to the loss of staff.

## Removing uncertainty

It's therefore important to provide accurate information: make sure everyone in the organization who is involved knows what's going to happen and what it will mean for them. Experience has taught us that there is actually very little for people to worry about. It's clear that during a transformation, things are going to change that may require people to say goodbye to certain aspects of the work, but an agile transformation is not designed to get rid of people. Nor does such a transformation result in less work. By making certain processes more efficient, your organization will be able to create more value for customers and that still requires human effort.

It's important to make sure that everyone knows there is a role for them. It's a good idea to take people on a trip and show them the big picture of SAFe as well as the roles that go with it. You can use training and coaching to help people to determine what their development will look like and to grow in their new roles.

## Who is eligible for the new roles?

An agile organization has a number of fixed roles. Below, we focus on the most important of them.

- **Product owner.** This is a particularly important and demanding role in Scrum. The product owner must bridge the divide between the business and the teams. Often, there are already people in various positions who have competencies needed to be a good product owner. Take business analysts, for example: they are used to drawing up requirements and are skilled in stakeholder management. Experts who know everything about a particular product, service or programming language could also be suitable. One example is an expert in the field of lean and agile. Program managers and project managers could also be eligible because they are good at retaining an overall view. System engineers and architects could also take on the role of product owner.
- **Release train engineer (RTE).** Program managers and project managers could be eligible for this role too. Scrum masters who have experience at the team level and would like to lead multiple teams are also eligible. Also consider lean-agile coaches and SPCs (SAFe Program Consultants).
- **Product manager.** This is the chief product owner, as it were, who is connected to the Agile Release Train. The role is similar to that of product owner, but a product manager takes a broader overall view. Market specialists could also be suitable for this role.
- **Scrum master.** This is a fairly new role in organizations making the transition to agile and it involves competencies that do not translate one-to-one from a more traditional role. A scrum master makes sure that the team performs optimally. Candidates for this role include testers, project managers, and developers and lead developers. New staff members are also – or even particularly – suitable for this role. They enter the organization with no preconceptions and can therefore look at the process objectively.



## What do we do with managers?

“We’re going agile, so we won’t need managers anymore.” That’s a statement you often hear. But it’s not entirely true. However, the role of managers does change. To quote the management consultant and statistician W. Edward Deming: “It is not enough that top management commit themselves for life to quality and productivity. They must know what it is that they are committed to – that is, what they must do. These obligations cannot be delegated.” It’s even better if managers are actually involved in the work.

Lean-agile managers have a role that entails more coaching than managing to ensure that decisions are made in a much more decentralized way, by the people in the organization who work with customers all day long.

Assigning new roles does not happen from one day to the next. People are not assigned a new role just like that, it’s much better if management invites them to choose their new role. In short, the management style shifts from push to pull. In this regard, good coaching is essential. As we emphasized earlier in this white paper, training is vital. It’s fine to use external SPCs or coaches for this, but make sure they train people in the organization to take over this role.

To make coaching a success, you need to find people’s intrinsic motivation. This is not primarily about competencies, but rather about passion. What do people want to do? How do you make sure that they come home from work with a smile on their face?

# Lean Portfolio Management (LPM)

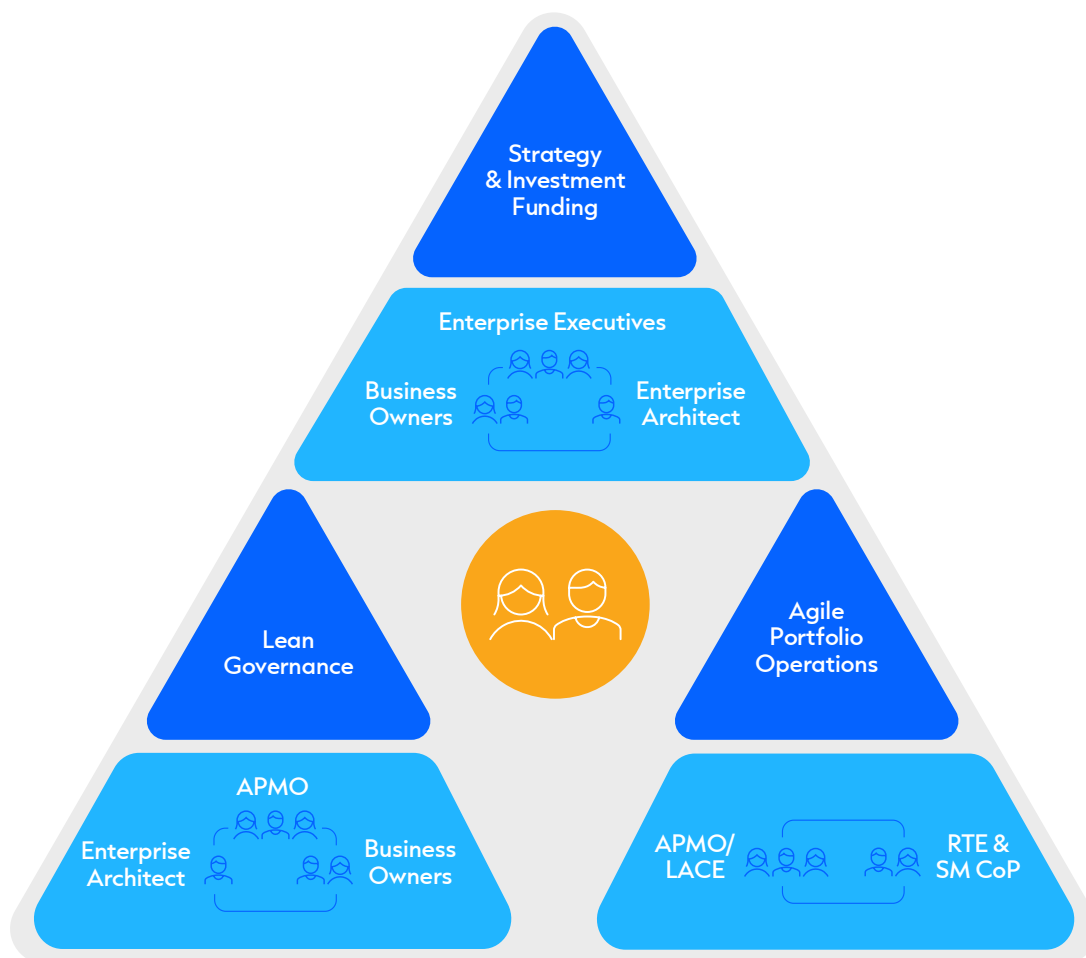
How do you link your organization's strategy to its execution? Using Lean Portfolio Management, you can evaluate ideas against your organization's strategy. Below, we run through the components you need to set up Lean Portfolio Management.

The best way for us to illustrate the importance of Lean Portfolio Management is by showing you what happens if you don't use it. Organizations that don't use LPM are exposed to a variety of risks.

For example, a lack of insight into ongoing work and the distribution of budgets for the period ahead. The planning of business cases is too detailed and the organization runs like an oil tanker, that is, it lacks the flexibility to respond to new developments.

When you ask members of an executive team to explain their business strategy, you often get very different answers. Concepts like vision and strategy are abstract. Lean Portfolio Management helps you to get a handle on them.

Figure 7: The three dimensions of Lean Portfolio Management



# From traditional portfolio management to Lean Portfolio Management

Lean Portfolio Management consists of three ingredients.

- **Strategy, investment, funding:** what is the strategy and how are you going to realize it? What budgets do you have?
- **Agile Portfolio Operations:** this is more about execution. How do you coordinate value streams, support execution and make progress in terms of operational excellence?

- **Lean Governance:** how do you start working with flow, and how do you – together – make the right choices? How do you measure portfolio performance?

In essence it's about shifting as an organization from a traditional approach to project management to a lean-agile approach. Lean Portfolio Management will only be successful if you look at reality through a different lens.

Linking the strategy to its execution is a matter of collaboration. Broadly speaking, this involves collaboration between enterprise executives, business owners and the enterprise architects. They are the ones who handle lean budgeting and funding for the value streams that develop and maintain the portfolio products and services.

## Strategic goals

Figure 8: The Portfolio Canvas

**PORTFOLIO CANVAS**      Portfolio Name:       Date:       Version:

**Value Propositions**

Value Streams	Solutions	Customers	Channels	Customer Relationships	Budget	KPIs Revenue
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Key Partners	<input checked="" type="checkbox"/> Key Activities	Key Resources
<input type="text"/>	<input type="text"/>	<input type="text"/>

Cost Structure	Revenue Streams
<input type="text"/>	<input type="text"/>



If you know where you want to go, Portfolio Canvas is a good tool for capturing the as-is state of a portfolio. You can realize the future state portfolio canvas in three steps:

## 1. Explore opportunities

Together with major stakeholders, you capture the as-is state of the portfolio. You then start thinking divergently, brainstorming to come up with as many scenarios as possible.

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## 2. Make decisions

In this phase, you decide on the scenarios you're going to use. Suppose your organization wants to attract more young customers. In this phase, you determine the channels and target groups to focus on.

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## 3. Identify epics

Based on the remaining scenarios, you decide which epics (strategic initiatives) will help you realize the future state portfolio canvas. Once you have decided on the epics, you split them into features that can in turn be split into user stories that are small enough to be tackled by the teams. It is important to emphasize that execution is decentralized.

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## Value stream budgets

When it comes to budgeting, we also see a mindset that is different from that seen in traditional projects. It can take months or even years before there is clarity about the project budgeting across the entire organization. One aim of Lean Portfolio Management is to always focus on portfolio management when discussing budgets.

Another aim is to have value streams considered fixed costs. If you work with stable scrum teams, costs estimation becomes predictable.

You set a fixed total annual budget and during the course of the year you look at how much budget each value stream gets for each PI period.

There are four “guardrails” to ensure you don’t overspend.

## 1. Guide investments

The first guardrail is guiding investments by horizon. For example: your organization wants to move to the cloud, offer a different service, tap into a different market.

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## 2. Apply capacity allocation

Determine how much capacity is allocated to upgrading, improvement and innovation.

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## 3. Approve significant initiatives

Evaluate significant initiatives together with business owners. On occasion, it may be necessary to say no to initiatives.

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## 4. Continuous business owner engagement

Actively involve business owners. This is a way to prevent your IT organization from becoming overburdened.

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## Creating flow with Portfolio Kanban

Portfolio Kanban is a tried and trusted method to visualize and analyze the flow of epics (strategic initiatives). The method provides a good picture of what your organization is working on, what lies ahead, and what will be analyzed. Portfolio Kanban has the following phases.

### 1. Funnel

Everyone can put forward ideas in this phase.

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### 2. Reviewing

Ideas are further elaborated and the decision is made to go ahead with them or not.

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### 3. Analyzing

A business case is drawn up to justify the investment. This business case is not 30 or 40 pages long; it’s a lean business case and ideally has a length of no more than 2 pages.

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Next, the work is sent to the Agile Release Trains for execution via the Program Backlog phase, then comes the Implementing phase and finally the Done phase.

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# Measure & Grow with SAFe®

How do you measure Business Agility? How do teams and ARTs develop in terms of Business Agility? Are the teams and trains well aligned with the business?

As an organization, you implement SAFe to effect change. But change is never an end in itself. The question is how successful the change is and how you measure it. Over the past years, SAFe has made great strides in terms of analyzing progress and determining next steps.

Measure & Grow looks at the 7 [core competencies](#) of SAFe.

Ultimately, it's about making your organization agile and not just reacting to change but trying to anticipate it. Each organization's journey to Business Agility is different.

## How and where can you accelerate?

You've gone on a journey to perform a SAFe implementation, you've attended a training course, you have coaches and trainers in place... Now it comes down to making choices: prioritizing and organizing.

You have two options for accessing SAFe assessments:

1. They are available to [download](#) for free in the form of spreadsheets.

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2. SAFe community members can access the [online versions of the SAFe assessments](#).

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The second option provides access to an online environment where you can fill in the assessments. It is also possible to send links from there to people in your organization so that they can fill in the assessments.

It's important to stress that there are no right or wrong answers. The point is to see the extent to which your organization is growing towards Business Agility. Bear in mind that people always fill out questionnaires with a certain amount of subjectivity. The more people who respond, the better the picture you get of the situation.

Once you complete the Business Agility Assessment, you will see that the previously mentioned 7 core competencies are split into 3 competency dimensions, resulting in 21 dimensions. A total of 64 questions are asked. The high- and low-value outliers are clearly visible on the graph.

## Measurement and improvement pitfalls

The key is to be careful:

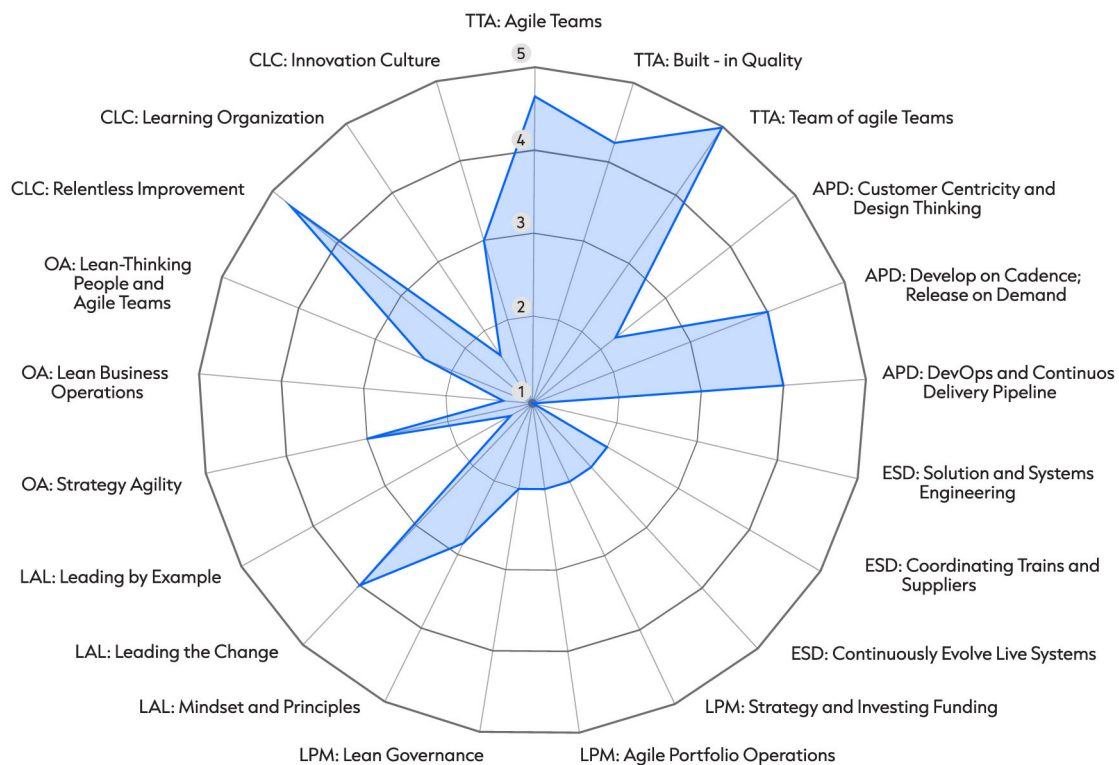
- when combining data into a single value. You're looking at an average as well as the average of the sector you are in.
- when using the results to rate the progress of the portfolio. You're retrieving details, which can be confronting. Don't let it discourage you.
- when you see that the data seems to be worse at first. For example, keep in mind that you need a start-up period.
- by trying not to follow up on too many things at once. This is in line with the general agile approach. Look for what requires the least effort and could deliver the most value.

## What are your next steps?

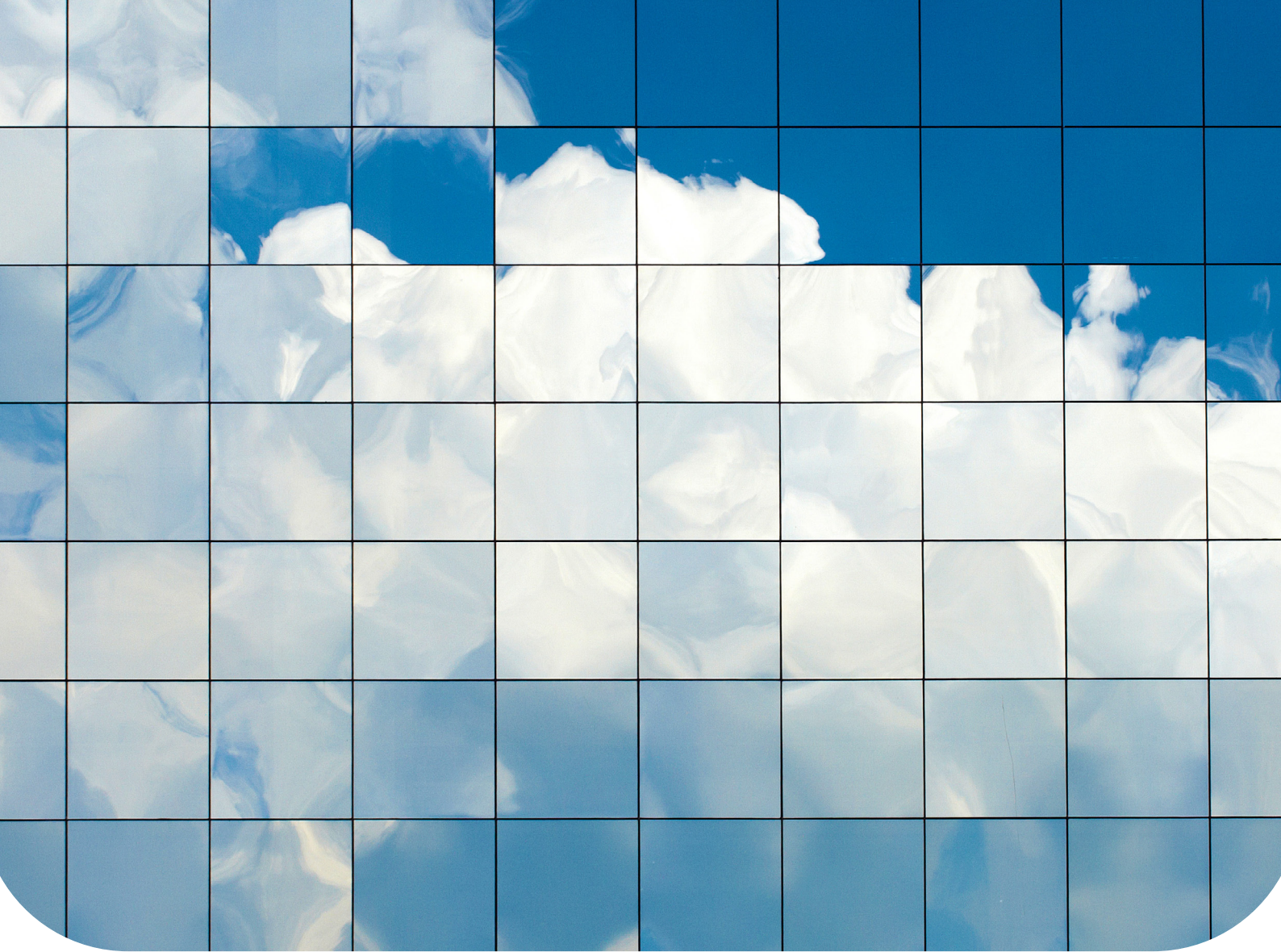
How are you now going to apply what you've learned? According to SAFe, you can use a quite simple method. First, you need to identify Grows. These are activities for increasing skills in a dimension of a core competency.

Next, you use the Grows to create backlog items and you set priorities for the improvement opportunities. As is standard agile practice, you then start working in different iterations, gradually expanding skills.

Figure 9: SAFe® Business Agility Assessment







## Final considerations

To conclude, we offer a few tips for organizations that want to get started with Measure & Grow within SAFe.

- Focus on a small number of data trends at the same time. Start small. Start with what delivers the most value for the least effort.
- Keep an eye on how you actually assess what the results are.
- Don't leave it to a process manager, but rather decentralize the ability to assess. Assessment is a tool for continuous improvement that everyone should be able to access.
- Involve the people on the work floor. Look at what the impact is for them.
- Measure & Grow can bring about change, but taking action requires leadership.

## Experienced in a wide range of industries

### ABOUT ERANEOS

As a global Management & Technology Consultancy Group, Eraneos supports organisations in not only designing but successfully implementing a future-proof digital transformation strategy that can make an everlasting impact.

By listening to what businesses want and understanding their needs, we can fast-track and embed transformation with ease by aligning people with technology, processes and leadership, effortlessly.

Knowing your industry, technology and local context alongside a global perspective, gives us the advantage you need to succeed.

It's this deep understanding that enables us to shape and implement strategic transformation within your organisation while providing the best service. That's why our customers trust us with even the most complex of challenges, from strategic digital transformation in finance to the ethical application of A.I. in healthcare.

We don't just listen to your needs, we understand them. We're more than ready to help you realise your potential in the digital age.

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