

Leading Safe Agilist 6.0 Master Cheat Sheet

Digital Age and Business Agility (12-14%)

SAFe as an Operating System for Business Agility

SAFe positions itself as an operating system for business agility. Just as an OS manages hardware and software resources to run applications efficiently, SAFe orchestrates people, processes, and technology to deliver value continuously. It provides a common language and framework for alignment, collaboration, and decision-making across the organization.

Key components of SAFe as an operating system include:

- **Core values:** Customer centricity, alignment, built-in quality, program execution, and leadership.
- **Lean-Agile principles:** These underpin SAFe's approach to delivering value.
- **Portfolio, Program, and Team levels:** SAFe addresses different organizational levels and their specific needs.
- **Continuously evolving framework:** SAFe adapts to the changing business environment and incorporates new best practices.

Core Competencies of Business Agility

SAFe identifies seven core competencies essential for achieving business agility:

1. **Lean Portfolio Management:** Optimizing the flow of value from idea to cash.
2. **Enterprise Architecture:** Designing and evolving the enterprise to support business strategy.
3. **Continuous Learning Culture:** Fostering a culture of innovation and improvement.
4. **Agile Product Delivery:** Delivering value incrementally and iteratively.
5. **DevOps and Release Management:** Accelerating software delivery pipelines.
6. **Customer Centricity:** Understanding and responding to customer needs.
7. **Lean Governance:** Providing effective oversight and control.

By developing these competencies, organizations can create a culture of innovation, improve time-to-market, and increase customer satisfaction.

Thriving in the Digital Age

The digital age demands organizations to be agile, adaptable, and customer-centric. SAFe provides a roadmap for navigating this complex environment. By adopting SAFe principles and practices, organizations can:

- **Accelerate innovation:** Quickly respond to market changes and customer demands.
- **Improve time-to-market:** Deliver products and services faster.

- **Enhance quality:** Build high-quality products and services.

Lean-Agile Leaders (29-33%)

Lean-Agile Mindset

The Lean-Agile mindset is the foundation for adopting and applying SAFe principles and practices. It's a combination of beliefs, assumptions, attitudes, and actions that embrace the concepts of Lean Thinking and the Agile Manifesto.

To cultivate a Lean-Agile mindset, individuals and organizations need to:

- **Embrace change:** Be open to new ideas and approaches.
- **Focus on delivering value:** Prioritize customer needs and business outcomes.
- **Collaborate effectively:** Work together across teams and functions.
- **Continuously improve:** Seek out and implement enhancements.
- **Build a culture of trust and transparency:** Foster open communication and psychological safety.

SAFe Core Values

SAFe's core values provide a compass for decision-making and behavior. They are:

- **Alignment:** Ensuring that everyone in the organization is working towards the same goals.
- **Built-in Quality:** Delivering high-quality products and services from the start.
- **Program Execution:** Delivering value through rapid, iterative development.
- **Local Decision Making:** Empowering teams to make decisions at the point of work.
- **Leadership:** Providing clear direction, support, and coaching to teams.

SAFe Lean-Agile Principles

SAFe is built on ten immutable principles that guide the framework's practices and roles. These principles are derived from Lean and Agile thinking:

1. **Take an economic view:** Understand the full value stream and optimize for overall system performance.
2. **Apply systems thinking:** See the organization as a system of interconnected parts.
3. **Assume variability; preserve options:** Build flexibility into the system to respond to change.
4. **Build incrementally with fast feedback:** Deliver value in small, iterative increments.
5. **Base milestones on objective evaluation of working systems:** Measure progress based on tangible results.
6. **Visualize and limit work in progress (WIP):** Improve flow by managing the amount of work in progress.

7. **Apply cadence, synchronize with cross-functional teams:** Establish a predictable rhythm for work.
8. **Unlock the intrinsic motivation of knowledge workers:** Empower and engage teams.
9. **Decentralize decision-making:** Give teams the authority to make decisions.
10. **Organize around value:** Align teams with the flow of value to the customer.

Team and Technical Agility (6-8%)

Cross-Functional Agile Teams

A cross-functional Agile Team is a self-organizing group of typically 5-11 individuals who possess all the competencies required to deliver a valuable product increment. This means the team includes developers, testers, designers, and potentially business analysts.

Key characteristics of a cross-functional Agile Team:

- **Self-organizing:** Teams determine the best way to accomplish their work.
- **Cross-functional:** All necessary skills are present within the team.
- **Empowered:** Teams have the autonomy to make decisions.
- **Focused:** Teams are dedicated to a specific product or feature.

Benefits of cross-functional Agile Teams:

- Increased speed to market
- Improved quality
- Enhanced collaboration
- Increased job satisfaction

Built-In Quality

Built-in quality is a mindset and a set of practices aimed at preventing defects rather than detecting them later in the development process. It's about embedding quality into every aspect of development, from requirements gathering to deployment.

Key elements of built-in quality:

- **Continuous integration and continuous delivery (CI/CD):** Automated build, test, and deployment pipelines.
- **Test-driven development (TDD):** Writing tests before code.
- **Pair programming:** Two developers working together on the same code.
- **Code reviews:** Peer inspection of code.
- **Defects prevention:** Proactive measures to avoid defects.

Benefits of built-in quality:

- Improved product quality

- Faster time to market
- Reduced rework
- Increased customer satisfaction

Organizing Around Value with ARTs

An Agile Release Train (ART) is a long-lived, cross-functional group of Agile Teams aligned on a common mission. ARTs typically consist of 5-12 Agile Teams and align to a value stream.

Key elements of organizing around value with ARTs:

- **Value stream:** A sequence of activities that deliver value to a customer.
- **ART alignment:** Teams working together to deliver a valuable product increment.
- **Program Increment (PI):** A time-boxed period for delivering value.
- **PI Planning:** A collaborative planning event for the ART.

Benefits of organizing around value with ARTs:

- Increased alignment and collaboration
- Improved visibility and predictability
- Faster time to market
- Better business outcomes

Agile Product Delivery (29-33%)

Customer-Centric Culture

A customer-centric culture is foundational to the success of any organization, especially in the agile context. It emphasizes understanding and addressing customer needs as the primary driver for product development and service delivery. Key elements of a customer-centric culture include:

- **Customer Focus:** Prioritizing customer needs and satisfaction over internal processes or metrics.
- **Empathy:** Understanding customers' perspectives, pain points, and desires.
- **Continuous Improvement:** Constantly seeking feedback and iterating based on customer insights.
- **Cross-functional Collaboration:** Breaking down silos and fostering collaboration across teams to deliver value to customers.
- **Customer Journey Mapping:** Visualizing the customer experience to identify opportunities for improvement.
- **Customer Metrics:** Measuring customer satisfaction and using data to drive decisions.

By cultivating a customer-centric culture, organizations can build stronger relationships with customers, increase customer loyalty, and drive innovation.

Design Thinking

Design thinking is a human-centered approach to problem-solving that focuses on creating innovative solutions. It involves five key phases:

1. **Empathize:** Understanding the user's needs and challenges through observation and research.
2. **Define:** Clearly articulating the problem to be solved based on user insights.
3. **Ideate:** Generating a wide range of potential solutions through brainstorming and creativity.
4. **Prototype:** Creating tangible representations of ideas to test and refine.
5. **Test:** Gathering feedback on prototypes and iterating based on user input.

Design thinking is closely aligned with agile principles and can be applied at various levels of an organization. It helps teams develop products and services that truly meet customer needs and provide exceptional user experiences.

ART Backlog and WSJF

An Agile Release Train (ART) is a large, cross-functional team aligned to deliver a value stream. The ART Backlog is a prioritized list of features and capabilities that the ART will deliver in upcoming Program Increments (PIs).

The Weighted Shortest Job First (WSJF) is a prioritization model used to rank items in the ART Backlog. It considers four factors:

- **Business Value:** The potential benefit to the business.
- **Job Size:** The estimated effort required to complete the work.
- **Risk:** The potential for unforeseen challenges or delays.
- **Constraints:** Any dependencies or limitations that impact delivery.

PI Planning

Program Increment (PI) Planning is a collaborative workshop where an Agile Release Train (ART) aligns to a common mission and delivers value. It's a big room planning event where teams across different functions come together to plan work for the next Program Increment (typically 8-12 weeks).

Key aspects of PI Planning:

- **Vision and Objectives:** The Program Increment Objectives (PIs) are defined, which are specific, measurable, achievable, relevant, and time-bound goals for the upcoming PI.
- **Team Planning:** Teams break out to plan their features and stories based on the PI Objectives.
- **Dependency Management:** Teams identify and manage dependencies between features and teams.
- **Risk Management:** Potential risks are identified and mitigation plans are discussed.
- **Capacity Planning:** Team capacity is assessed and allocated to features.

- **Management Review and Problem Solving:** Management reviews team plans, provides guidance, and helps resolve impediments.

Develop on Cadence; Release on Demand

This principle emphasizes the importance of a predictable development rhythm while maintaining flexibility for releasing value.

- **Develop on Cadence:** Teams work in a synchronized manner, releasing increments of value at regular intervals. This creates a predictable cadence for planning, development, and delivery.
- **Release on Demand:** While development follows a cadence, the release of value to customers can happen independently. This allows for faster time-to-market and better response to customer needs.
- **Continuous Integration and Continuous Delivery (CI/CD):** These practices are essential to support the "Develop on Cadence; Release on Demand" principle. CI ensures frequent integration of code changes, while CD automates the build, test, and deployment process.

Continuous Delivery Pipelines with DevOps

A Continuous Delivery Pipeline (CDP) is a series of automated processes that deliver software from development to production. It includes continuous exploration, integration, deployment, and release on demand.

- **DevOps Culture:** A DevOps culture is essential for successful CDPs. It fosters collaboration between development and operations teams, breaking down silos and improving efficiency.
- **Automation:** Automation is key to reducing manual effort and increasing speed of delivery. It includes build automation, test automation, deployment automation, and infrastructure as code.
- **Lean Flow:** Identifying and eliminating waste in the value stream is crucial for optimizing the CDP.
- **Measurement:** Key performance indicators (KPIs) are used to measure the performance of the pipeline and identify areas for improvement.
- **Recovery:** Having a robust incident response plan in place is essential to minimize downtime and ensure service continuity.

Benefits of CDPs:

- Faster time-to-market
- Improved quality
- Increased deployment frequency
- Better collaboration between teams

Lean Portfolio Management (12-14%)

SAFe Portfolio

A SAFe Portfolio represents a collection of value streams that collectively deliver a continuous flow of valuable solutions to customers. It operates under a unified funding and governance model. The

portfolio aligns strategy with execution by managing a group of Development Value Streams (DVS). Each DVS develops one or more solutions necessary for the portfolio to achieve its business mission and vision.

Key characteristics of a SAFe Portfolio:

- **Alignment with enterprise strategy:** Ensures all portfolio initiatives support the overall business objectives.
- **Decentralized decision-making:** Empowers teams to make decisions while providing necessary guidance and support.
- **Lean Portfolio Management (LPM):** Provides the framework for managing the portfolio, including strategy, investment, operations, and governance.
- **Value stream-centric:** Organizes work around the flow of value to customers.
- **Continuous improvement:** Fosters a culture of learning and adaptation.

Strategic Themes

Strategic themes serve as the bridge between the enterprise strategy and the portfolio strategy. They provide a clear focus for portfolio management decisions and ensure alignment with the overall business objectives. Strategic themes are typically expressed as outcome-oriented statements that inspire and guide the portfolio.

Key characteristics of strategic themes:

- **Aligned with enterprise strategy:** Directly support the organization's long-term goals.
- **Measurable and time-bound:** Define clear objectives and timelines for achievement.
- **Inspiring and motivating:** Encourage innovation and collaboration.
- **Prioritized:** Determine the relative importance of different themes.
- **Dynamic:** Can evolve as the business environment changes.

Portfolio Canvas

The SAFe Portfolio Canvas is a visual tool that helps organizations define and communicate their portfolio vision. It provides a comprehensive overview of the portfolio's strategic direction, value propositions, key partners, resources, activities, cost structure, and revenue streams. The canvas helps teams align their efforts and make informed decisions.

Key elements of the Portfolio Canvas:

- **Portfolio Vision:** A clear and aspirational statement of the portfolio's future state.
- **Value Propositions:** The benefits and values delivered to customers.
- **Key Partners:** Collaborators and suppliers essential to the portfolio's success.
- **Resources:** The assets required to deliver the portfolio's value propositions.
- **Activities:** The key actions necessary to create and deliver value.
- **Cost Structure:** The expenses incurred in operating the portfolio.

- **Revenue Streams:** The sources of income generated by the portfolio.

Epic Hypothesis Statements

An Epic Hypothesis Statement (EHS) is a crucial tool in SAFe for defining and prioritizing large-scale initiatives. It's a structured way to articulate the problem or opportunity an Epic aims to address, and the expected outcome.

Structure of an EHS:

- **Problem or Opportunity:** Clearly define the business challenge or potential gain.
- **Solution:** Describe the proposed solution to address the problem or capitalize on the opportunity.
- **Assumptions:** Identify underlying assumptions that impact the success of the Epic.
- **Measures:** Outline key performance indicators (KPIs) to measure the success of the Epic.

Example:

- **Problem:** High customer churn due to poor user experience.
- **Solution:** Develop a new mobile app with improved navigation and personalized features.
- **Assumptions:** Customers will adopt the new app, and development costs will be within budget.
- **Measures:** Increased customer satisfaction, reduced churn rate, and increased app downloads.

Benefits of EHS:

- Aligns teams and stakeholders around a shared goal.
- Facilitates risk assessment and mitigation.
- Provides a clear basis for decision-making.
- Improves communication and transparency.

Traditional and Lean Budgeting Approaches

Traditional budgeting is often based on annual planning, top-down allocation, and detailed expense tracking. It can be rigid, slow, and unresponsive to changing market conditions.

Lean budgeting, on the other hand, is more flexible and adaptive. It focuses on value delivery, empowers teams, and encourages continuous improvement. Key principles include:

- **Value-based allocation:** Funds are allocated based on the expected value of outcomes.
- **Decentralized decision-making:** Teams have autonomy in managing their budgets.
- **Continuous adjustment:** Budgets are regularly reviewed and adjusted based on performance.
- **Transparency and visibility:** Financial data is readily available to all stakeholders.

By shifting from traditional to lean budgeting, organizations can improve their ability to respond to market opportunities, reduce waste, and increase overall financial performance.

Portfolio Kanban

Portfolio Kanban is a visual management system used to visualize and manage the flow of Epics and large initiatives through the portfolio. It helps organizations prioritize work, identify bottlenecks, and improve overall portfolio flow.

Key components of Portfolio Kanban:

- **Kanban board:** Visual representation of the Epic lifecycle.
- **Work items:** Epics and other large initiatives.
- **Columns:** Represent different stages of the Epic lifecycle (e.g., Ideation, Analysis, Implementation, Deployment).
- **WIP limits:** Control the number of Epics in progress.
- **Metrics:** Track lead time, cycle time, and other performance indicators.

Benefits of Portfolio Kanban:

- Improved visibility into portfolio work.
- Faster time to market for new products and services.
- Increased focus on delivering value.
- Better resource allocation and utilization.

Leading the Change (6-8%)

Lead by Example

A cornerstone of effective leadership, "Lead by Example" is particularly crucial in the context of Agile transformations. As a SAFe Agilist, you are expected to embody the values and principles of SAFe.

This involves:

- **Living the Agile values:** Demonstrate transparency, inspection, adaptation, collaboration, and courage in your daily work.
- **Practicing Agile behaviors:** Actively participate in Agile ceremonies, such as daily stand-ups, sprint planning, and retrospectives.
- **Embracing a growth mindset:** Continuously learn and adapt to new challenges and opportunities.
- **Building trust and collaboration:** Foster a culture of open communication and teamwork.
- **Delivering value:** Focus on creating customer value and delivering results.

By modeling these behaviors, you inspire and empower your team to embrace the Agile mindset and contribute to the overall success of the transformation.

Lead the Change

Leading change is an essential skill for a SAFe Agilist. It involves creating a vision for the future, building a coalition of supporters, and overcoming resistance to change. Key aspects of leading change include:

- **Establishing a clear vision:** Articulate the benefits of adopting SAFe and how it aligns with the organization's goals.
- **Building a guiding coalition:** Assemble a team of influential leaders to support the transformation.
- **Creating a sense of urgency:** Communicate the need for change and the potential consequences of inaction.
- **Overcoming resistance:** Address concerns and challenges, and provide support to those affected by the change.
- **Celebrating successes:** Recognize and reward achievements to reinforce positive behaviors.

By effectively leading the change, you can create a positive and supportive environment for the adoption of SAFe.

SAFe Implementation Roadmap

The SAFe Implementation Roadmap provides a structured approach to implementing SAFe within an organization. It consists of a series of steps and activities designed to guide the transformation process. Key phases of the roadmap include:

- **Prepare the Organization:** Build a business case for SAFe, identify key stakeholders, and establish a change management strategy.
- **Launch and Execute:** Implement core SAFe components such as Agile Teams, Agile Release Trains (ARTs), and Portfolio Management.
- **Accelerate:** Expand SAFe adoption to additional parts of the organization, focus on continuous improvement, and achieve business agility.
- **Sustain and Grow:** Embed SAFe into the organizational culture, drive innovation, and prepare for future challenges.

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