

Our Kanban System in Action

The Rational ALM Team's SAFe-Based Transformation

Chris Thompson

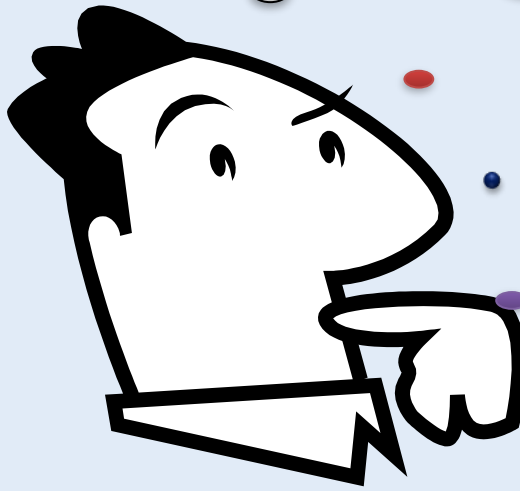
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How can we affect
cultural change to
adopt lean thinking?

Get business
and IT talking...

Make sure we
deliver the right
stuff...

Ensure we invest
“just enough”
based on our
capacity...

Survey Question #1: How is your organization adopting agile/lean today? [Select all that apply]

- a. Some or all of our teams are agile*
- b. Our Programs (team-of-teams) are agile*
- c. Our Portfolio is agile*
- d. We are not adopting agile/lean yet*

Survey Question #2: How well does your organization understand 'lean thinking'?

- a. Completely understand*
- b. Somewhat understand*
- c. Basic understanding*
- d. No understanding*

Survey Question #3: Does your team currently apply Kanban practices in your planning?

- a. Yes, all of our teams use Kanban*
- b. Yes, some of our teams use Kanban*
- c. No, none of our teams use Kanban*
- d. I have no idea what that means*

Survey Question #4: What are the primary challenges in your team's ability to plan and prioritize feature delivery? [Select all that apply]

- a. Investing too much time too early in the process*
- b. Relatively ranking features quickly*
- c. Understanding capacity constraints and applying them*
- d. Affecting cultural change to apply lean thinking*
- e. Other*

Lean is about the people, principles and values...



Lean and agile transformation changes
are
culture changes

“Culture **reflects the realities** of people working together every day...

...a set of **values, practices, and traditions** that define who we are as a group.”

--Frances Hesselbeim

No framework alone will make you successful.

Work by [Uwe Kils](http://www.ecoscope.com/iceberg/) <http://www.ecoscope.com/iceberg/>

Lean principles

Eliminate waste

- Anything that does not add value to the customer is waste
- Must be able to identify waste

Amplify learning

- Skills enhancements
- Validation from customers

Decide as late as possible

- Delay decisions until they can be made based on facts, not on assumptions and predictions

Deliver as fast as possible

- The biggest or best does not survive, only the fastest
- Understand Cost of Delay

Empower the team

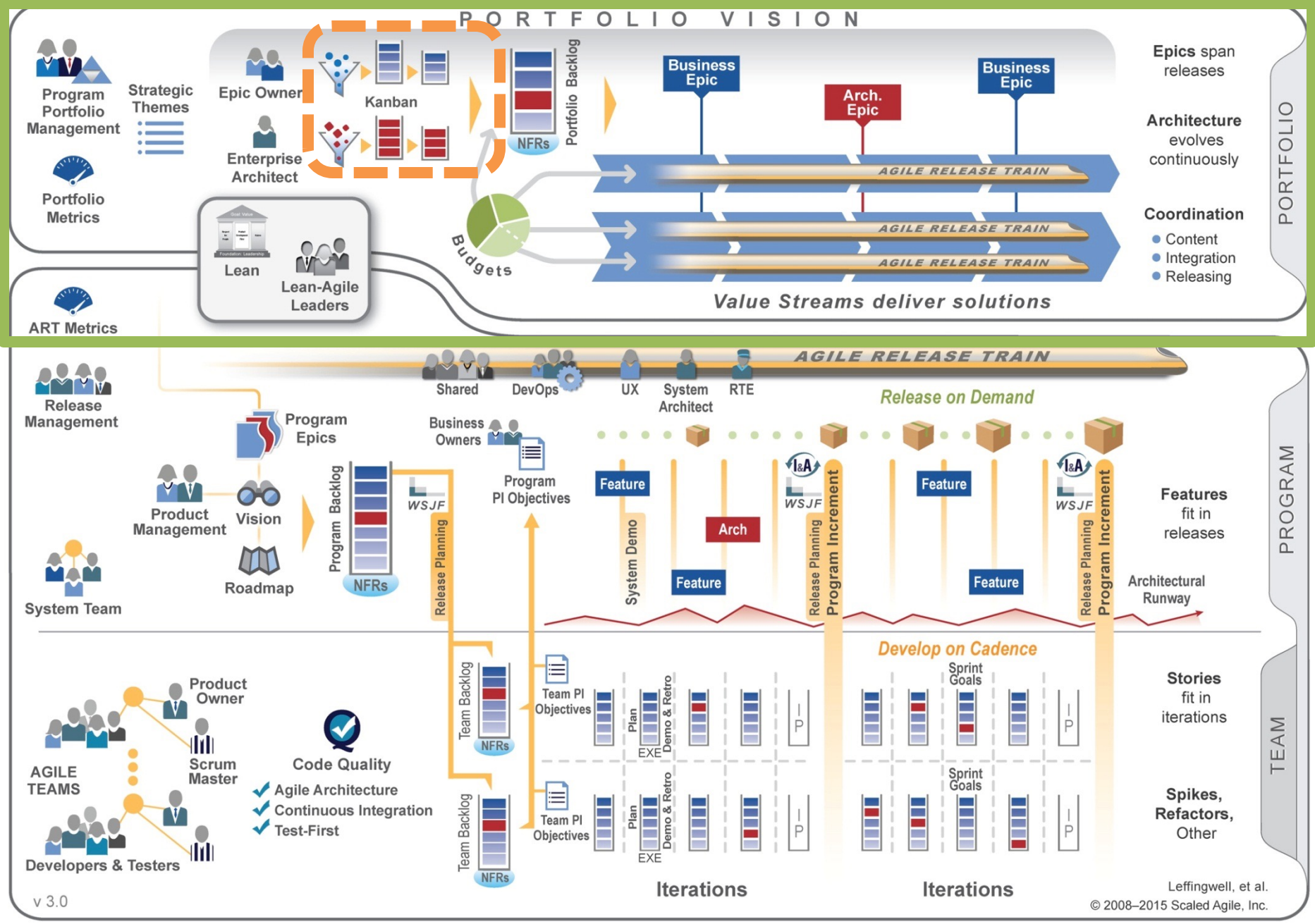
- Establish independent, self-governing teams and stick to it!

Build integrity

- Automate build, testing, deployment
- Ensure the system does what the customer wants

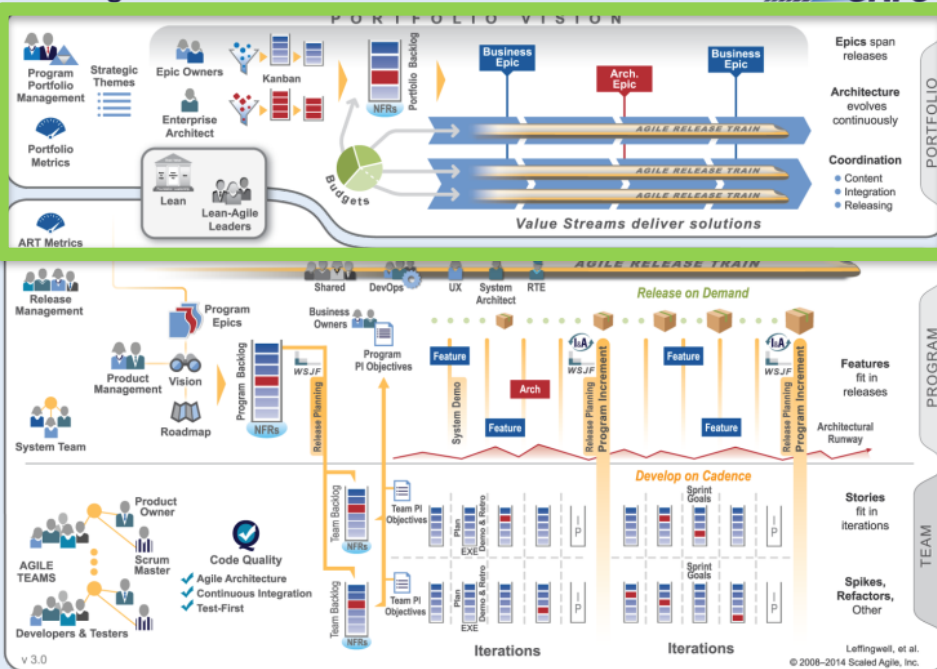
See the whole

- Software systems are not just a sum of their parts, but a product of their interactions



Challenges related to portfolio management

Scaled Agile Framework®



Too many management commitments without understanding impact

How do we make sure that our portfolio management and investment activities/methods are aligned with our agile development approach

Too many high level requests the teams will never get to

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Motivations for adoption of 'lean thinking'

'Just enough'
investment

- Eliminate wasted resources used upfront for planning before investment decision is made
- Invest enough to move "idea" to next phase

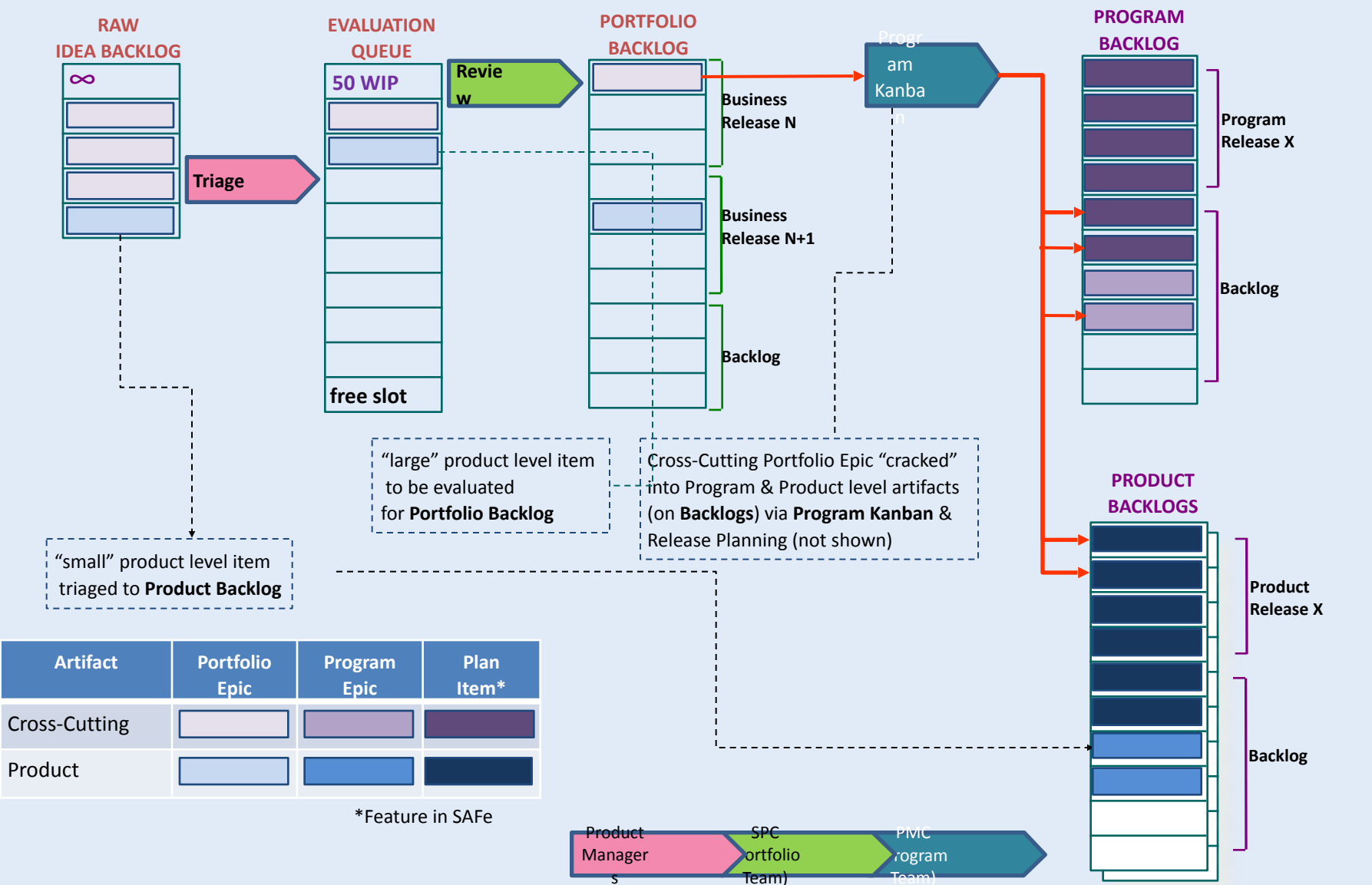
Capacity is key
driver

- Only utilize resources for estimating, analysis and solution exploration as we have capacity to work on ideas
- Move ideas through to implementation as teams have capacity

Rank **quickly,**
relatively,
consistently

- Lightweight ranking
- Ranking that favors low investment in analysis over precision until later in the process

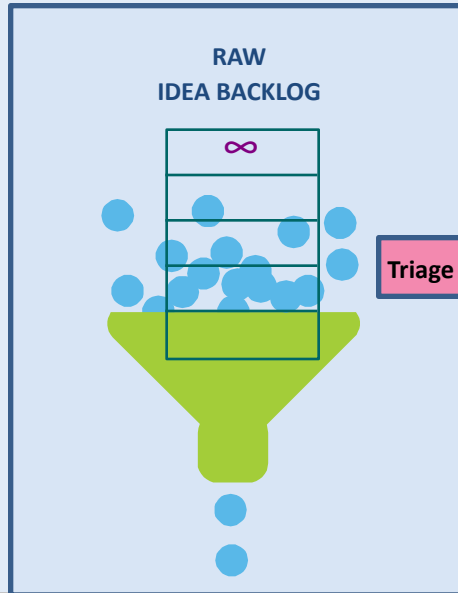
Program Recipe:



Portfolio Recipe: Epic Kanban System

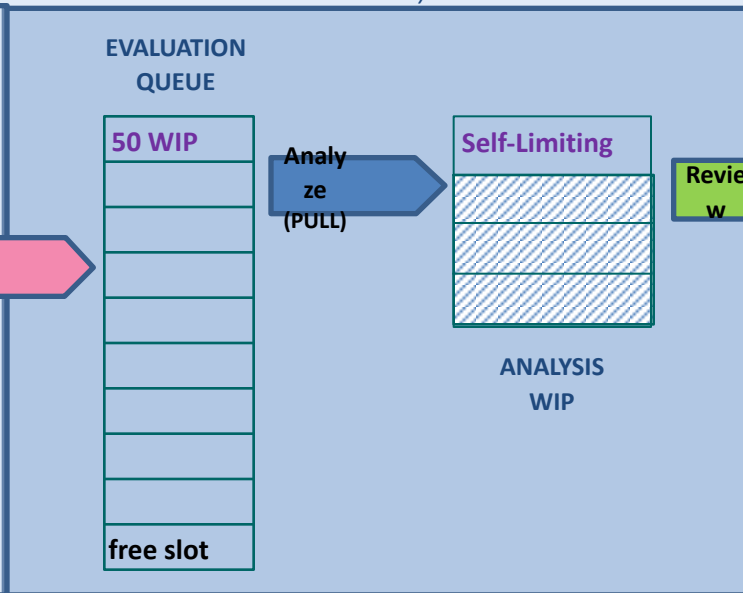
FUNNEL

The "capture" state, all new ideas welcome



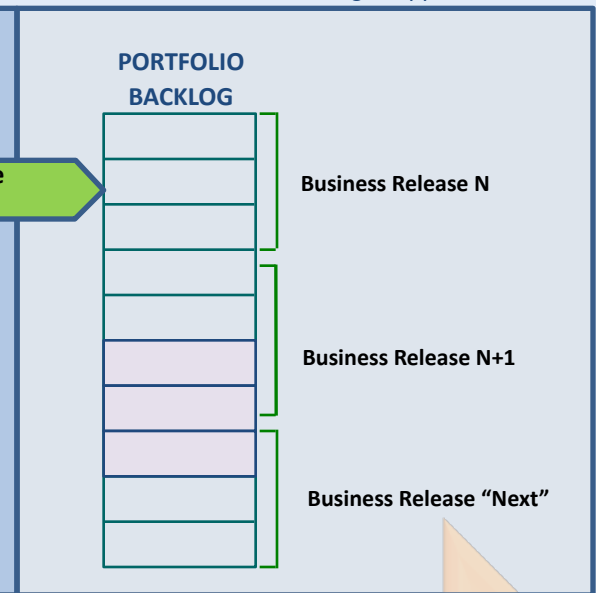
ANALYSIS QUEUE

Review (preliminary estimates) and Analysis (lightweight business case) occur here



ROADMAP

These Epics have made it through the Portfolio Kanban with "go" approval



Portfolio Epic [Draft]

Portfolio Epic [Submitted]

Portfolio Epic [Reviewed]

Portfolio Epic [Analyzing]

Portfolio Epic [Ready]

Portfolio Epic [Approved]

DRAFT -> SUBMITTED

Summary
Description
Business Benefit
Customer Benefit
Customer(s)

*Submitted Epics on RIB

Triage

SUBMITTED -> REVIEWED -> ANALYZING

Strategic Theme
User/Business Value (H,M,L)
Time Criticality (H, M, L)
Risk Reduction/Opp Enablement (H, M, L)
Job Size (S,M,L)
[Potentially] Affected Teams

*Triaged, Reviewed, Analysis Epics on EQ

Analyze (PULL)



ANALYZING -> READY

Affected Teams[s] Release Cycles (quarters)
Affected Teams[s] PM Estimates
Cost Estimate
Lightweight Business Case

*Approved Epics on Portfolio Backlog


Review


Kanban in ALM Foundation (RTC)

 **Portfolio Kanban** 

59 items: 45 open, 14 closed | Ends in: --


Plan Details Edit






Owner:  Portfolio














Iteration:  ALM Backlog

Plan Type: Product Backlog

☒ Include All Items

Planned Items  [Links](#) [Snapshots](#) [Dashboard](#) [Notes](#)

☐ View As: Kanban      Exclude (14 items excluded) |

Demonstration

SAFe References

- IBM Support for SAFe
 - <http://bit.ly/ibmSAFe>
- SAFe with the Power of IBM DevOps
 - <http://bit.ly/19lOjMz>
- Configure existing JTS/RTC for SAFe
 - <http://bit.ly/19QLTGR>
- Download SAFe 3.0 RTC process template (beta)
 - <http://bit.ly/1CPJ6Zq>
- Agile Learning Circle (includes SAFe Learning Roadmap)
 - <http://bit.ly/AgileLearnO>
- Scaled Agile Framework
 - <http://scaledagileframework.com>