Mapping Organizational Roles to SAFe Roles

With Richard Knaster and Gerald Cadden
SAFe Transformation

Why is role mapping important?
Some questions we will need to answer

- Why is role mapping important for SAFe Transformation?
- What are the responsibilities of the key SAFe roles?
- What are the attributes of the new roles and who will fill them?
- When and how do we fill the new roles?
- When and how do we train people so they are effective?
- What is the role of a manager in SAFe?
Ultimately, Lean-Agile transformation depends on people embracing the new way of thinking and working
The risk of moving people to new roles

Rumors and Misinformation

Fear and Worry

Employee Attrition
Roles covered in this session:

- Scrum Master
- Product Owner
- Release Train Engineer
- Product Manager
- Functional Manager
Other important functions and roles not covered today

**System Architect-Engineering** provides architectural guidance and technical enablement to the teams on the train.

The **System Team** provides processes and tools to integrate and evaluate assets early and often.

**Business Owners** are the key stakeholders on the Agile Release Train.

**LPM** is responsible for strategy and investment strategy, Agile portfolio operations and Lean governance.

**Epic Owners** are responsible for coordinating portfolio epics through the Portfolio Kanban system.
Moving to SAFe roles
# With a new mindset

<table>
<thead>
<tr>
<th>FROM…</th>
<th>...TO…</th>
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</thead>
<tbody>
<tr>
<td>From coordinating team contributions…</td>
<td>…to coaching the teams to collaborate</td>
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<tr>
<td>From setting deadlines…</td>
<td>…to setting objectives</td>
</tr>
<tr>
<td>From driving toward specific outcomes…</td>
<td>…to being invested in the program’s overall performance</td>
</tr>
<tr>
<td>From knowing the answer…</td>
<td>…to asking the teams for the answer</td>
</tr>
<tr>
<td>From directing …</td>
<td>…to letting the teams self-organize and hit their stride</td>
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**From fixing problems…**

**…to helping others fix them!**
Scrum Master

Focused on enforcing the Scrum process and helping the team to communicate, coordinate, and cooperate to deliver stories and by removing impediments:

- Coaches the team, facilitates team and program events
- Removes impediments to the team’s progress
- Assists the team in implementing SAFe
- Fosters adoption of Agile technical practices
- Assists the PO in preparing and refining the backlog for PI and Iteration Planning
- Coaches the team on the best ways to refine their backlog and create Stories
Scrum Master attributes

- A servant leader that listens and supports team members
- Understands and empathizes with others
- Encourages and supports the development of people and teams
- Uses influence over authority
- Thinks beyond day-to-day activities
- Helps without diminishing the commitment of others
- Protects the team
Candidates for the Scrum Master role

- Testers
- Project Managers
- Developers
- Leads
- New hires
Product Owner

Focused on delivering stories and enablers to the train, tasked with helping the team *build the right things at the right time*

- Ensures Stories and Enablers meet the acceptance criteria
- Represents customers and stakeholders
- Participates in Iteration ceremonies as a team member

- Helps decompose Features into Stories and prioritizes the Team Backlog
- Works with the System Architect and Team to understand and prioritize Enablers
- Accepts the Stories as done
Product Owner attributes

- Understands the customer
- Ability to communicate
- Good business sense
- Technical knowledge

- Good negotiator
- Trust
- Courage
- Vision
Candidates for the Product Owner role

- Business Analysts (BAs)
- Subject Matter Experts (SMEs)
- Program and Project Managers
- Systems Engineers
- Domain Experts
- Architects
Release Train Engineer

Focuses on continuous improvement and adapting for the benefit of the Agile Release Train (ART)

- Managing and optimizing the flow of value through the ART
- Fostering collaboration between teams and system-level stakeholders
- Facilitating PI Planning readiness and the event itself
- Tracking and communicating key ART execution metrics
- Escalating and tracking ART impediments
- Facilitate relentless improvement for the ART
RTE attributes

- Trusted servant leader
- Program execution expertise
- Guides people in problem identification and decision-making
- Creates an environment of mutual influence
- Empathizes with others

- Encourages the personal development of teams
- Persuades rather than uses authority
- Systems thinker
- Supports the commitments made by the teams
Candidates for the RTE role

- Program and Project Managers
- Scrum Masters
- Lean-Agile Coaches
- SPCs
Product Manager

Focused on the business aspects and the market at large, tasked with *building the right Features at the right time*.

- Collaborates and sets expectations with Product Owners, stakeholders, customers, architects
- Prioritizes Features and negotiates Enablers in the Program Backlog using WSJF
- Sets the Vision and Roadmap for the train
- Has significant people skills and the innate ability to navigate the political landscape
- Collaborates with the train to set scope. Accepts the Features as done
Product Manager attributes

- Domain knowledge
- Sense of balance
- Forward thinking
- Curious about customer needs
- Hypothesis driven
- Good market knowledge
- Trust
- Messaging and positioning expertise
- Engages stakeholders and works to consensus
Candidates for Product Manager role

- Project and Program Manager
- Existing Product Managers
- Domain Experts
- UX Architect
- Marketing Analyst
- Technical Marketing Specialist
- Business Analysts (BAs)
- Subject Matter Experts
- Product Owner

Product Manager
How do we fill the roles?
Push, pull or in between?

- Management invites people to choose their new roles
- People choose the roles that are best for them
- Management helps people choose the role that is right for them

- Management tells people what their new roles are
- People are assigned to new roles
- Management decides which roles are best for people
Inviting people to the new roles
What happens to managers?
Leading the mission

- Setting the mission with the minimal possible constraints
- Operating as a Business Owner
- Collaborative strategy and planning
- Eliminate impediments
Developing people

- Coaching teams
- People and team development
- Eliminate demotivating policies and practices
- Individual career and skills development

- Compensation and performance management
- Unlocking people’s intrinsic motivation
- Honest and critical feedback
- Encouragement, recognition
Lean-Thinking Manager Teacher

- Reinforces the core values
- Supports SAFe principles
- Adopts a Lean-Agile mindset

- Drives Lean-Agile excellence
- Coaching and training teams
- Leads the transformation
Transformation is not automatic. It must be learned; It must be led.

–W. Edwards Deming
Leadership must believe in the change

Executives and managers must buy-in and be educated before the practitioners

- Beyond SAFe, leadership must be committed
- Being able to develop and agree upon a vision is a sign of their commitment and belief
- SPCs will need to guide the creation, answer the questions, and dispel myths
- The vision must be created with the people in mind, not profit or shareholders
Leadership must ready and actively engaged

- As the vision is being developed is when people will start to get wind of the change.
- Leadership should already have an understanding of the impact on people.
- At this point leadership must have a plan and be ready to engage people in the organization.
- Initial discussions / communications should not be detailed, but be more assuring of peoples future roles.
But timing matters

- **Timing for communication is all important for transformation success:**
  - Too early and you many not be ready, too late and you will be behind the rumor train

- **Timing impacts:**
  - Morale
  - Progress
When should we train people?
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<th>Core</th>
<th>Advanced</th>
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<td>Leading SAFe*</td>
<td>Attend advanced SAFe courses delivered by SPCs and continue your learning journey with additional certifications.</td>
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<td>Implementing SAFe*</td>
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<td>SAFe* Scrum Master</td>
<td>SAFe* Advanced Scrum Master</td>
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<tr>
<td>Solution Architects</td>
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<td>SAFe* System &amp; Solution Architect</td>
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<td>SAFe* for Teams</td>
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Ensure everyone knows they have a role!

“I’m not on the Big Picture, should I prepare my resume?”