3 Things I Learned Since Becoming an RTE

Learnings from using SAFe to run the business of Scaled Agile
Tamara Nation
SPCT and Release Train Engineer for Scaled Agile, Inc
A bad system will beat a good person every time.

W. Edwards Deming
The role of the Release Train Engineer is one of continuous learning and adapting for the benefit of their Agile Release Train
SO ....When you don’t know what to do with a problem, go back to core values and principles
Listen to understand the three patterns for success
Transformation is not automatic. It must be learned; it must be led.

W. Edwards Deming
Pattern 1
Facilitate Value Stream Mapping(s) to create Alignment & Transparency
Value Stream process map example

Idea Generation
- Everyone
  - LT = 1 day
  - PT = 30 min
  - %C&A = 50%

Analyze
- Product Management
  - LT = 120 days
  - PT = 5 day
  - %C&A = 30%

Implement
- Agile Teams
  - LT = 60 days
  - PT = 15 days
  - %C&A = 50%

Validate on Staging
- Everyone
  - LT = 14 days
  - PT = 1 day
  - %C&A = 95%

Deploy
- Operations
  - LT = 90 days
  - PT = 3 days
  - %C&A = 50%

Release
- Operations
  - LT = 60 days
  - PT = 30 min
  - %C&A = 80%

Validate Hypothesis
- Product Management
  - LT = 60 days
  - PT = 2 days
  - %C&A = 85%

Source: Value Stream Mapping, Karen Martin and Mike Osterling

Total LT = 405 days
Total PT = 26 days
Activity Ratio = 6.4%
Rolled %C&A = 2.4%
Value Stream Process Mapping

Outcomes

- Current State Mapping
- Improvement experiments and/or countermeasures
- Value Stream improvement measures

Recommended timebox
90min – 3hours

Recommended cadence
Quarterly
Value Stream Process Mapping

Meeting Agreements

- Start & Stop On-Time
- Be Present with no phone or laptop interruptions
- Blame-Free Zone
- Respectful disagreements is encouraged; its not acceptable to be disagreeable/grumpy
- Stop saying “Can’t, No, because”; Adopt ”Yes, if …”
- One conversation at a time
“On the VSM workshop did get a little bumpy as we had disagreement on the work as we worked on the mapping.”

–Chris James, Scaled Agile President and Chief Operating Officer
RETRO FEEDBACK

- Results at the end
- Came out with concrete actions
- Deep strategic discussions as a team
- Collaboration

- People leaving the room
- VS Scope too big initially
- Facilitating the facilitator—too many experts trying to drive
- Felt unprepared coming in—lead to a lack of alignment
# Value Stream Mapping Charter

<table>
<thead>
<tr>
<th>Target Value Stream</th>
<th>Prospect Sales Journey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specific Conditions</td>
<td>Seat Potential &gt; 3,000</td>
</tr>
<tr>
<td>Trigger</td>
<td>Forecast in SFDC</td>
</tr>
<tr>
<td>First Step</td>
<td>Identify a qualified lead</td>
</tr>
<tr>
<td>Last Step</td>
<td>PO Provisioned</td>
</tr>
<tr>
<td>Boundaries &amp; Limitations</td>
<td>Excluding greenfield markets and candidates</td>
</tr>
<tr>
<td>Improvement Timeframe</td>
<td>2018 2H</td>
</tr>
<tr>
<td>Executive Sponsor</td>
<td>Brendan Walsh</td>
</tr>
</tbody>
</table>
Enterprise Sales + Accounting
Quote to Cash Value Stream Mapping
“It was great to be able to map-out and visualize the flow of value from quote to cash, …We had some ideas around what problem areas we expected to arise; our ideas were validated in the workshop. The actions/outcomes we identified were concise and actionable.”

–Andrea Korte, Scrum Master Enterprise Sales
Repeat Customers

Enterprise Sales Prospect Journey
Value Stream Mapping
Value Stream process map example – Future state

- **Idea Generation**
  - LT = 1 day
  - PT = 30 min
  - %C&A = 85%

- **Analyze**
  - LT = 60 days
  - PT = 3 days
  - %C&A = 85%

- **Implement**
  - LT = 30 days
  - PT = 10 days
  - %C&A = 90%

- **Validate on Staging**
  - LT = 7 days
  - PT = 1 day
  - %C&A = 95%

- **Deploy**
  - LT = 5 days
  - PT = 1 day
  - %C&A = 85%

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- **Release**
  - Faster release, automate release
  - LT = 10 days
  - PT = 30 min
  - %C&A = 95%

- **Validate Hypothesis**
  - LT = 10 days
  - PT = 2 days
  - %C&A = 95%

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Total LT = 123 days
Total PT = 17 days
Activity Ratio = 13.9%
Rolled %C&A = 47.4%

Source: Value Stream Mapping, Karen Martin and Mike Osterling
“Value stream mapping on the sales journey created alignment, helped visualize delays and focused on solutions that matter.”

–Andy Carlson, Enterprise Sales Manager
Enterprise Sales + Accounting
Quote to Cash Value Stream Mapping

Action Items

- Add PO Required Field in SF -- DONE!
- Implement a tool in Salesforce like CPQ -- WIP - almost done!
- Have a standard, consistent quote form in single, shared location -- DONE!
- Have Docusign-type e-signature option for contracts -- DONE!
- Back-up for Jen (PTO)/Knowledge sharing -- Cait hired -- DONE!
- Back-up signatory for Jeremy -- ? (Jeremy always works on PTO, so not sure if we have a back-up ID'd?)
Pattern 2
Use Post Event Retros to increase Built-in Quality
“It would be tragic not to learn from this.”

–Jesse Brouillette, Scaled Agile VP of I&T
We agree to honor the Retrospective Prime Directive

"Regardless of what we discover, we understand and truly believe that everyone did the best job he or she could, given what was known at the time, his or her skills and abilities, the resources available, and the situation at hand."

Norm Kerth,
Project Retrospectives: A Handbook for Team Review
Post Event Retrospective Template

To capture learnings and actions to apply to improve after experiencing a quality event by mapping out the event timeline, reflecting on what went well, what did not, capturing learnings, and creating an action plan to apply those learnings in future work.

Recommended timebox
~45 minutes
Post Event Retrospective Template

Agenda
- Timeline of Events
- What Went Well
- What Could Have Gone Better
- Learnings/Ideas
- Action Plan
In PI Planning the release date was iteration 3.

Copyeditor was setup.

8am - Copy editor was able to access to staging. Before 2pm - James & Drew met and agreed to release the FAQs
2pm - Sean told to launch
Other things people will tell you when you ask
If your wellbeing isn’t healthy then your train won’t be healthy

Program Execution
Self Reflection

- Know Yourself
  - Checking with
    - Emotions
    - Physical Health

- How these are reflected in your body language/energetics and non-verbal queues?
Be Aware of the Impact of your physical presence

Our ART is a complex social network and you as the RTE are often the face of the train.
Pattern 3
Collaborate with SMs to generate fun & creativity in program execution
All program events are learning events AND Opportunities to do something memorable, impactful or a bit crazy
18.3.1 System Demo

FAQ Fiesta

FAQ or Fiction

Piñata Celebration
18.3.1 System Demo

FAQ Fiesta

FAQ or Fiction

Piñata Celebration
PO Sync Learnings from the Field
4.6 Update Flow + Confidence Meter
“Practice, Partner, Persevere”

Jean Tabaka + Laura Burke
Find a partner in the room and share which patterns you might be able to use to assist your train.
The role of the Release Train Engineer is one of continuous learning and adapting for the benefit of their Agile Release Train