

New and Noteworthy Support for SAFe 6.0 in IBM Engineering Lifecycle Management



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IBM Engineering Lifecycle Management

Enterprise Agile Planning using SAFe®

SAFe® is a knowledge base of proven, scalable, and configurable principles, practices, and competencies for Lean, Agile, and DevOps, no matter the organization’s size, industry, or complexity.

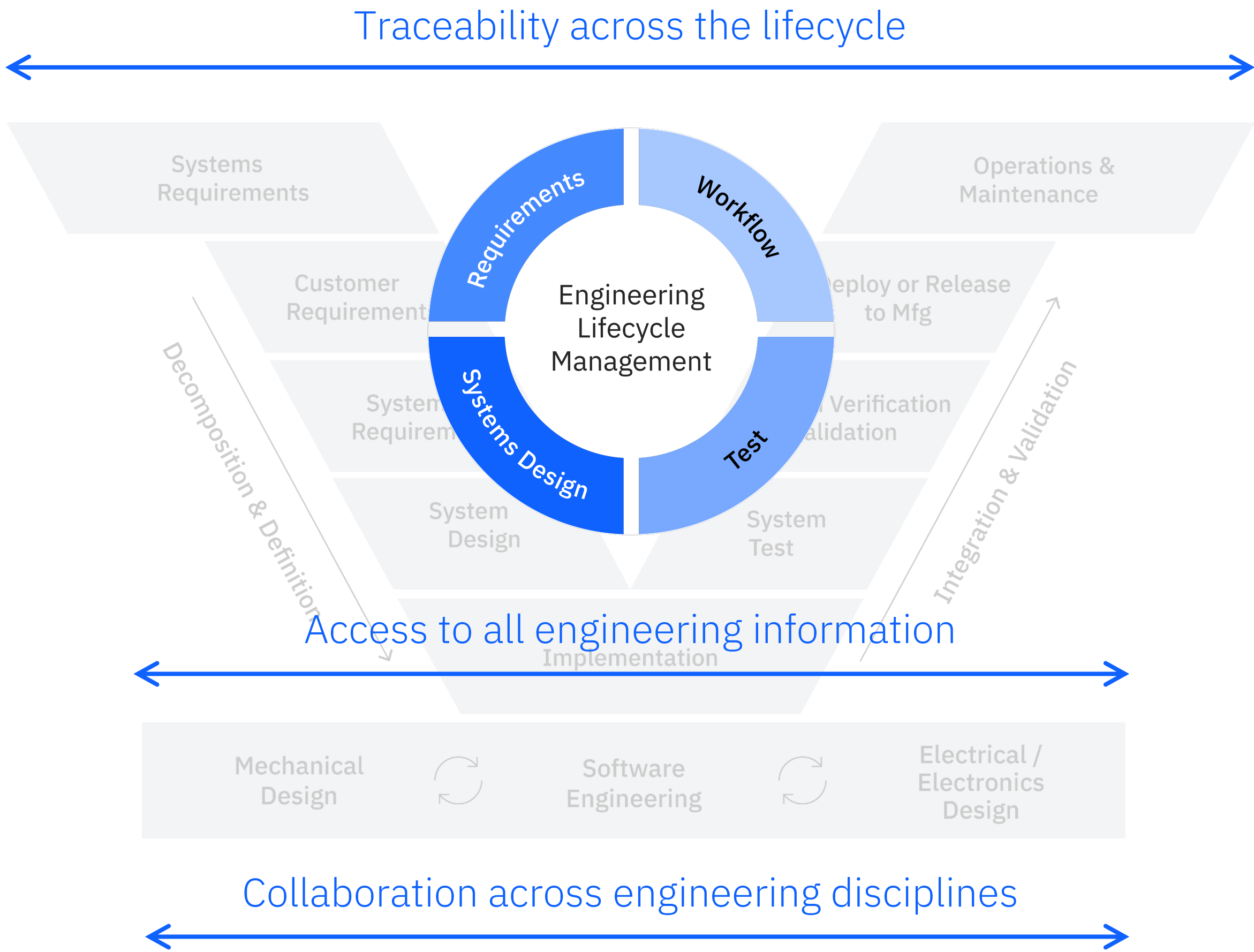
- 01

Get up and running quickly with out-of-the-box infrastructure to implement all levels of SAFe
- 02

Simplify change to culture and process with quick and easy access to SAFe guidance
- 03

Improve agility and predictability with role-based dashboards
- 04

Easily customize to fit your specific needs and organization



ELM Templates for SAFe® 6.0

Use two predefined process templates that support Scaled Agile Framework (SAFe®) 6.0 to establish your tooling environment

Full SAFe 6.0

Use template to establish a tooling environment for:

Full SAFe: with the Portfolio Epic, Solution Epic and Capability

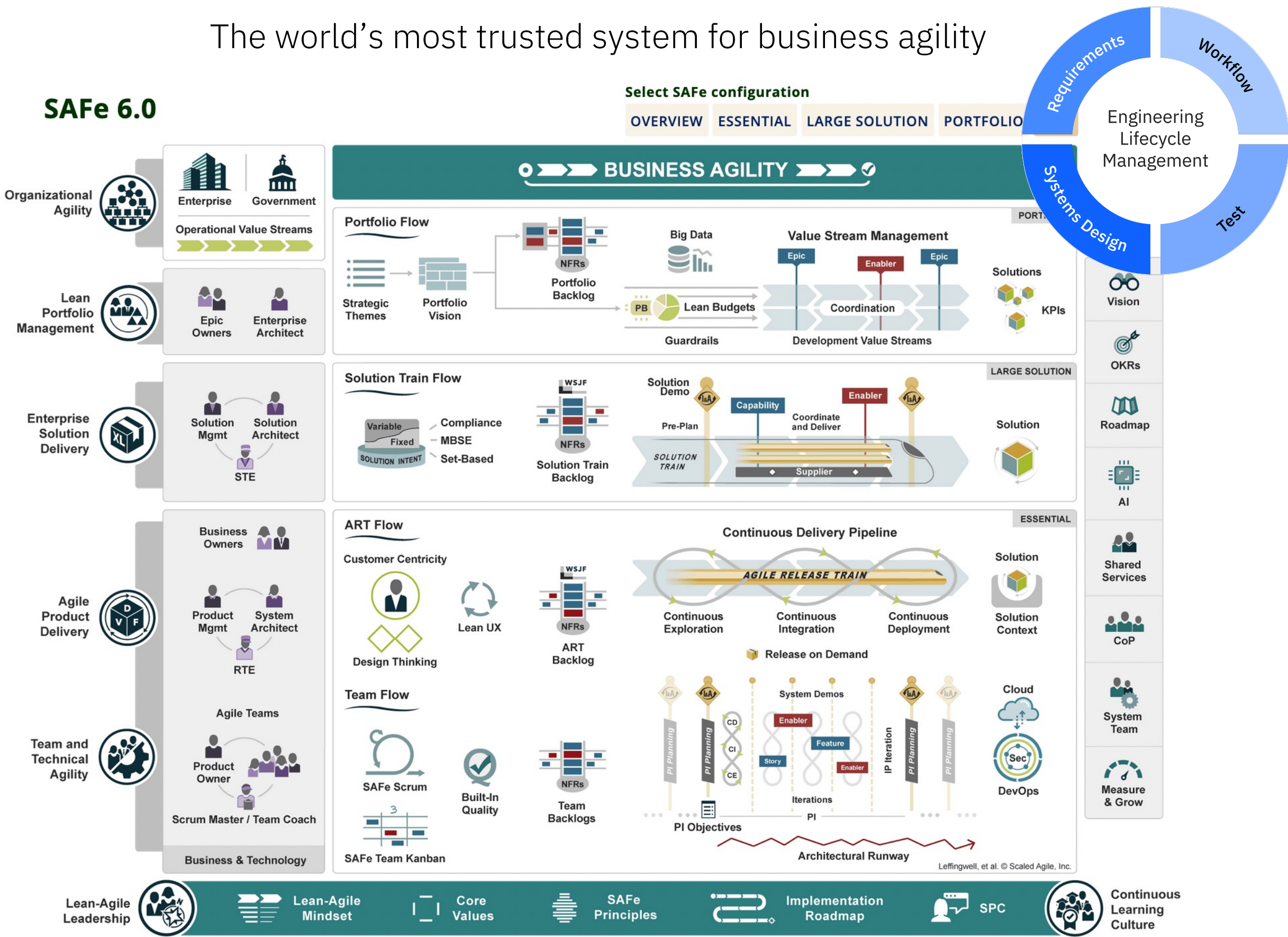
Large Solution SAFe: with Solution Epic and Capability.

Portfolio SAFe: with the Portfolio Epic, Solution Epic and Capability.

Essential SAFe 6.0

Use template to establish a tooling environment for an ART and its teams

These need to be associated with a Full, Large Solution or Portfolio SAFe tooling environments



New and Noteworthy: Support for SAFe 6.0

Strategic Alignment

Added new Work Item Types

- Strategic Theme: Value to Customer, Impact on Business, Impact on Competition
- Organization: Scope, Allocated Capacity, Allocated Investment, Budgeted Capacity, Budgeted Capacity, Total Market Opportunity
- Objective: Scope, Objective Type, Proposed
- Key Results: Scope, Business Value (planned), Business Value (Actual), Achieved Value (%)

Workflow Updates

- Updated Retrospective workflow to include Reviewed state to the Implementation state group.

Added new Portfolio Management plan type with the following views:

- Strategic Themes to show only Themes and its impact
- Organization to show only Organization hierarchy along with budget details
- Objective – Key Results to show Objectives and its alignment to Strategic Themes
- OKR Board to show Objective and child Key Results

Reporting updates

New 9 JRS reports to support Strategic alignment with OKRs have been added to the SAFe 6.0 reports.

New 7 Flow Metric reports have been added to the Enterprise Scaled Agile reports

Updated 18 SAFe reports to support new data model for SAFe 6.0

Deprecated 2 SAFe reports which are replaced by SAFe 6.0 report: Investment & opportunity (by Organization)

- Program Budgeted report
- Solution (value stream) Investment & Opportunity

Changed tagging:

- PI burndown chart (weeks in PI) [DB2 Advanced SQL to Enterprise Agile Report]
- PI burnup chart (weeks in PI) [DB2 Advanced SQL to Enterprise Agile Report]
- Planned Features without associated Epic [PORTFOLIO safe] (Enterprise Agile Report to SAFe 6.0)

Terminology changes

SAFe 6.0 recommends the following terminology changes::

- Program Increment with Planning Interval
- Solution with Solution Train
- Program with ART
- Solution Epic with Solution Train Epic
- Program Epic with ART Epic

The following artifacts were updated made to reflect the following terminology changes recommended by SAFe 6.0:

- Values of Scope enumeration
- Plan type and views names
- Work item templates
- Role names and permissions
- Timelines
- Artifact categories for test plans
- Artifact templates for SAFe related test plans
- Names, descriptions, and conditions of all existing reports

Updated Roles and permissions to empower teams and clarify responsibilities

SAFe® Support - Taxonomy

	Track & Plan	Solution Analysis	Quality
Portfolio flow	<ul style="list-style-type: none">– Strategic theme– Objective & Key results (OKRs)– Lean budget– Portfolio backlog / Kanban	<ul style="list-style-type: none">– Portfolio vision / Canvas– Lightweight business case	
Solution Train flow	<ul style="list-style-type: none">– Solution Train backlog– WSJF ranked list– Roadmap & Kanban	<ul style="list-style-type: none">– Value stream Canvas– Solution intent	<ul style="list-style-type: none">– Solution Train Test plan– Test cases– Test scripts
ART flow	<ul style="list-style-type: none">– ART backlog– WSJF ranked list– Roadmap & Kanban– Dependency board	<ul style="list-style-type: none">– Solution context– Rules / Personas– Lifecycle Scenarios (Acts, scenes, roles)	<ul style="list-style-type: none">– ART test plan– Test cases– Test scripts
Team flow	<ul style="list-style-type: none">– Ranked backlog– Kanban & Scrum boards– Task board– Dependency board	<ul style="list-style-type: none">– User story elaborations– Supporting artifacts– Release collections	<ul style="list-style-type: none">– Team test plan– Test cases– Test scripts
	Engineering Workflow Management	ERM – DOORS Next	Engineering Test Management

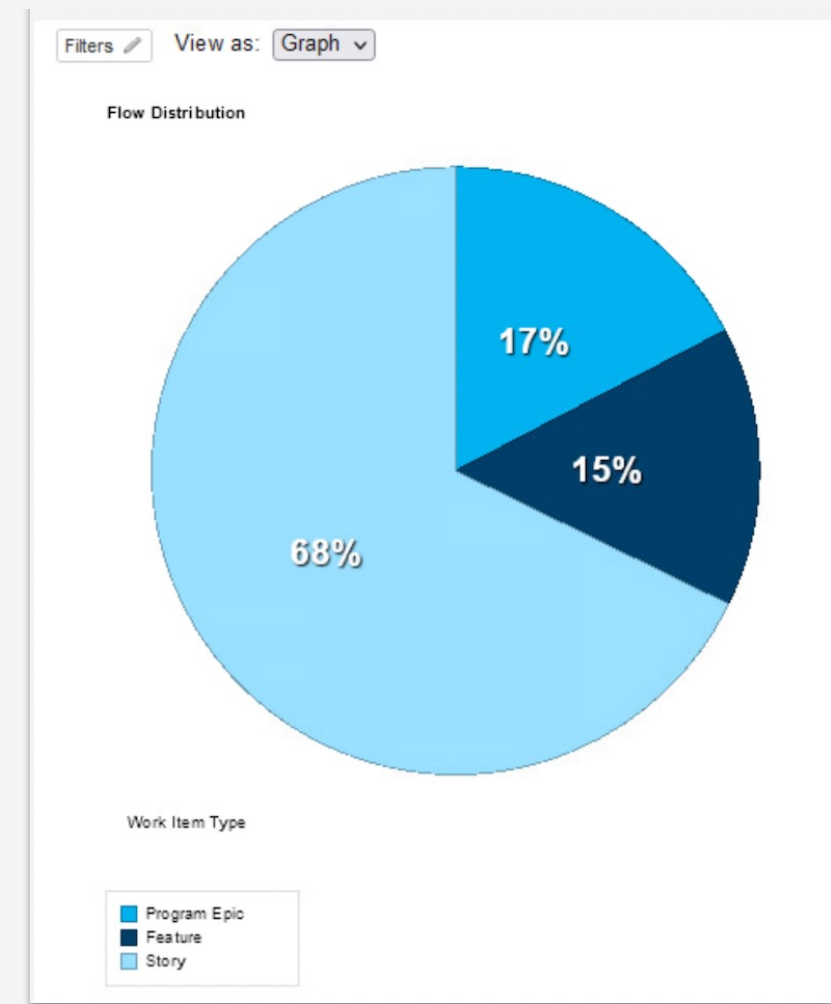
Measure flow of business value

Use Flow metric reports to measure effectiveness of an organization at delivering value .

Measure how reliably teams and ARTs are achieving the objectives they set for themselves.

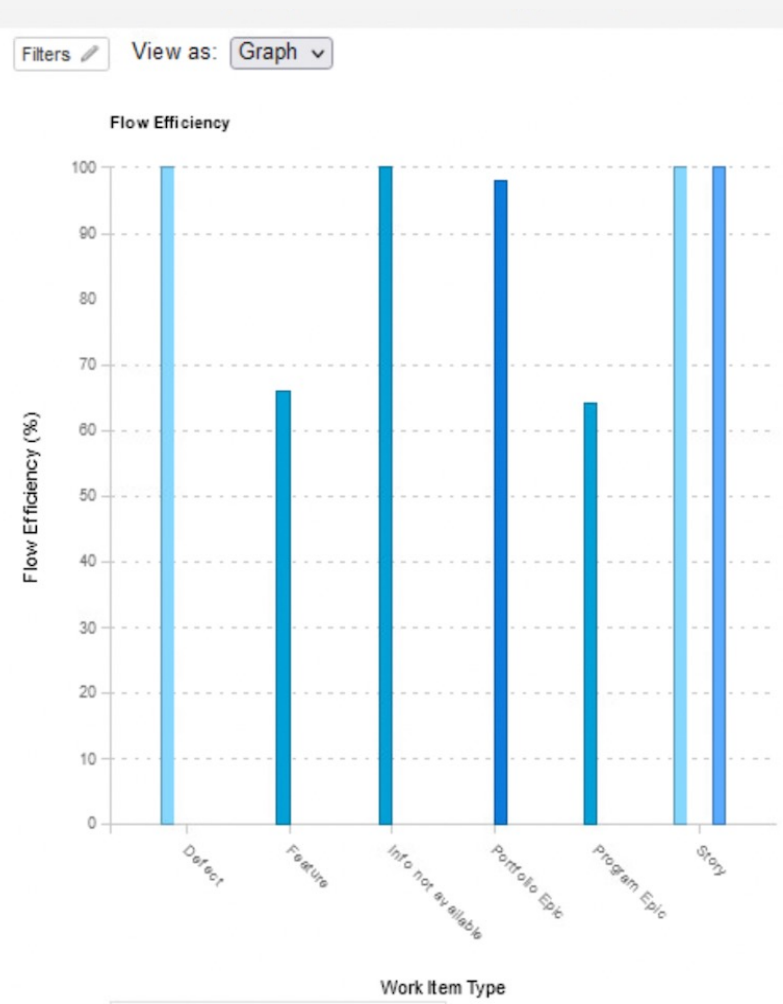
Identify opportunities for improvement at every level of the framework.

Flow Distribution



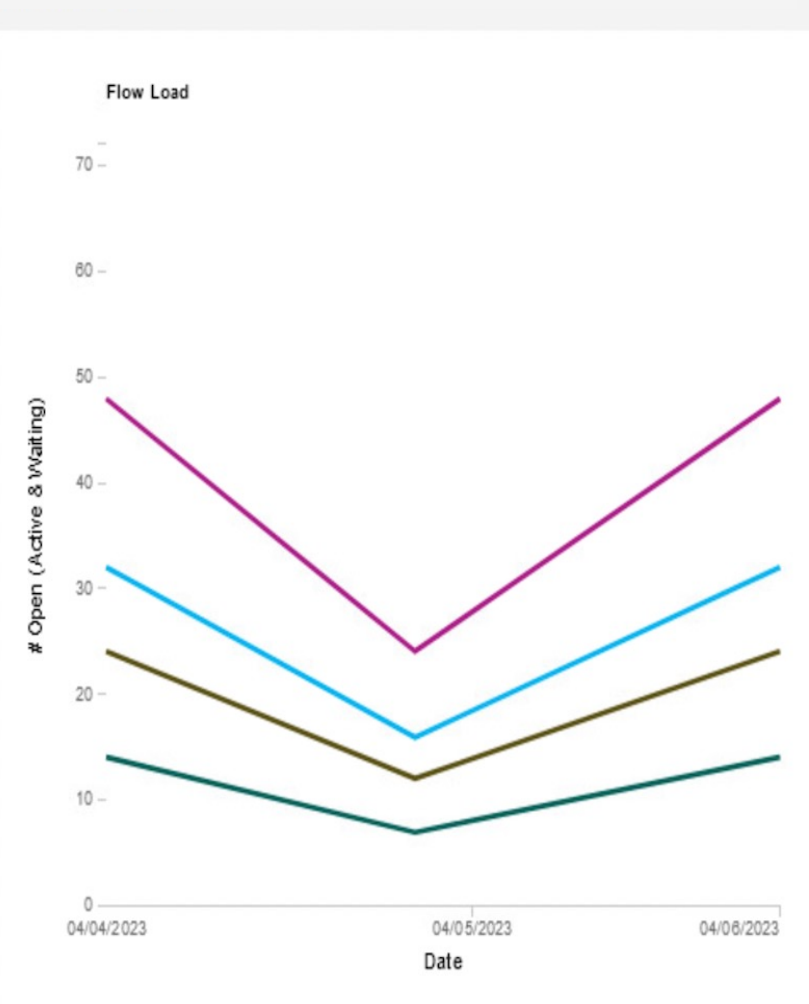
Flow Distribution is a measure of the proportion of work items by type in a system.

Flow Efficiency



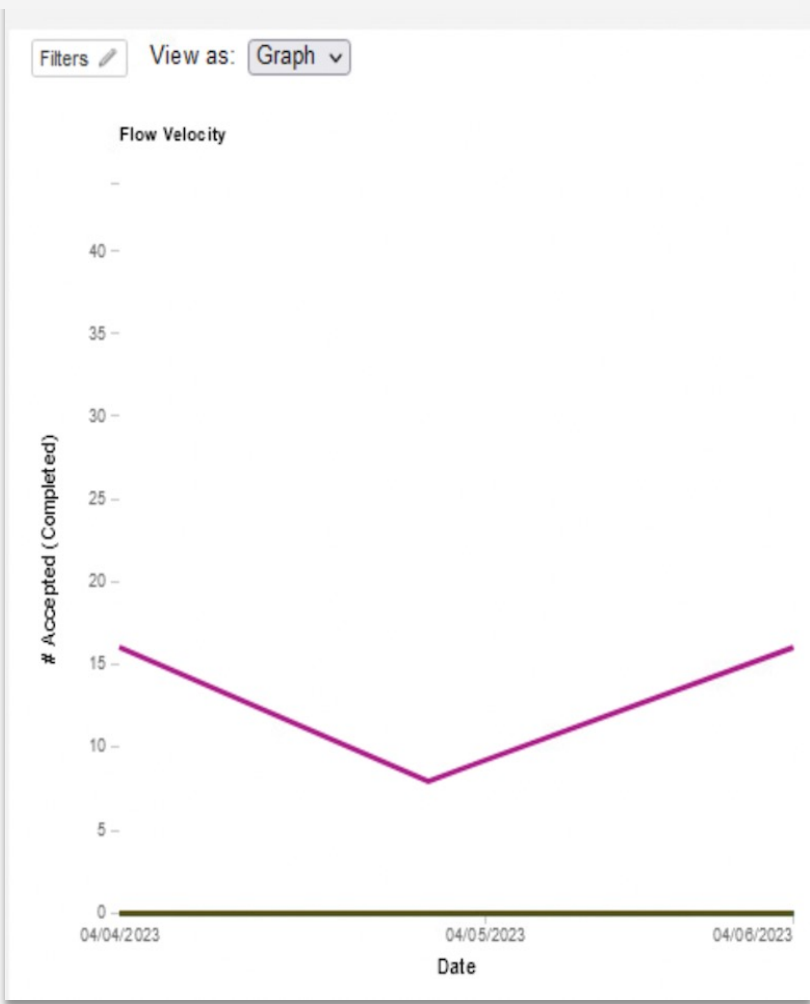
Flow Efficiency is the ratio of the total time spent in value-added work activities divided by the total flow time.

Flow Load



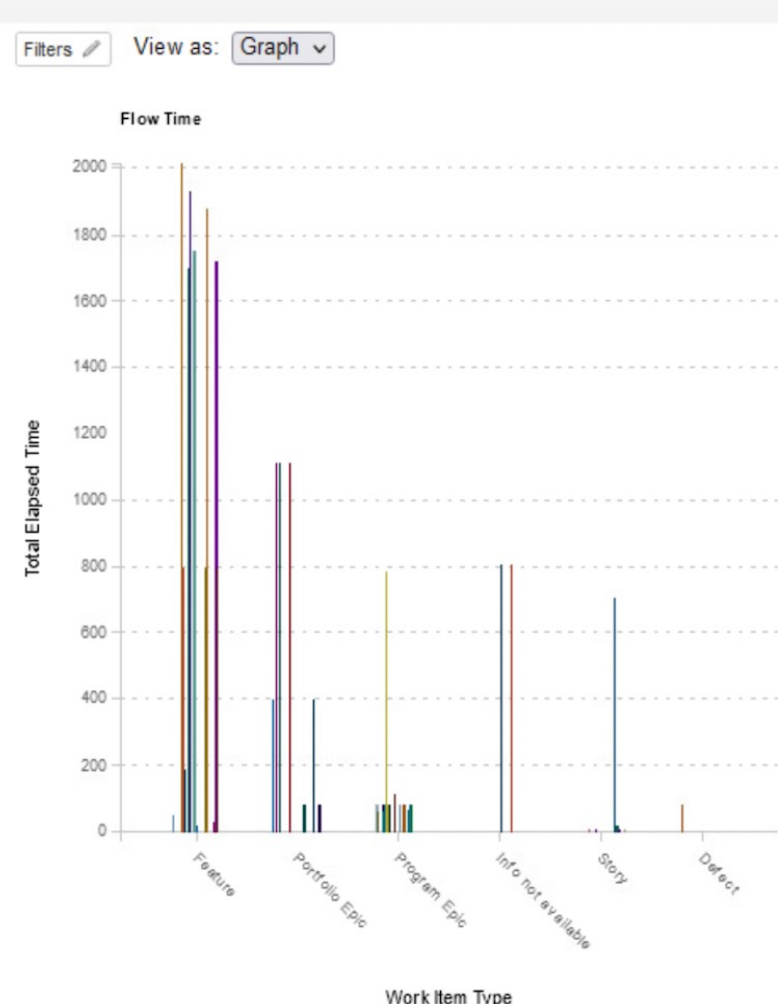
Flow Load is a measure of the number of work items currently in progress (active or waiting).

Flow Velocity



Flow Velocity measures the number of completed work items over a time period.

Flow Time



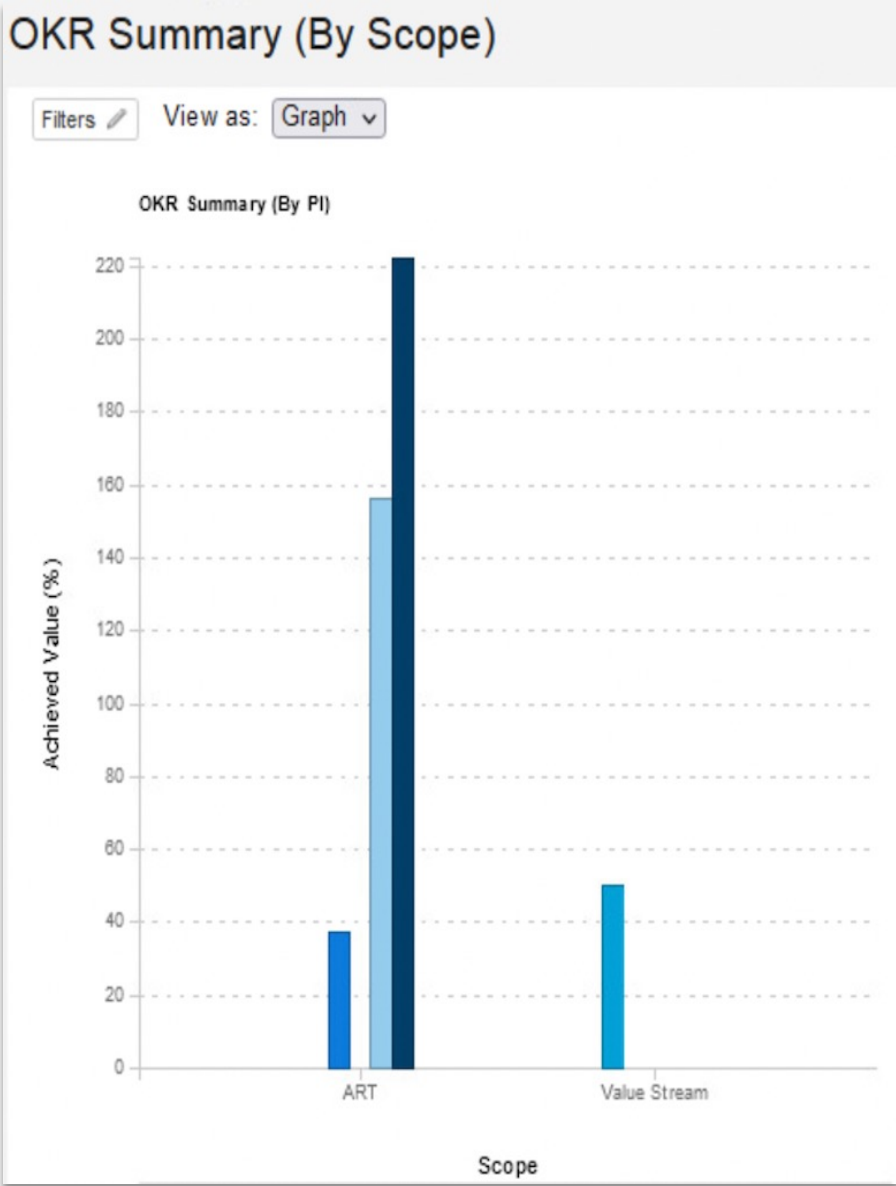
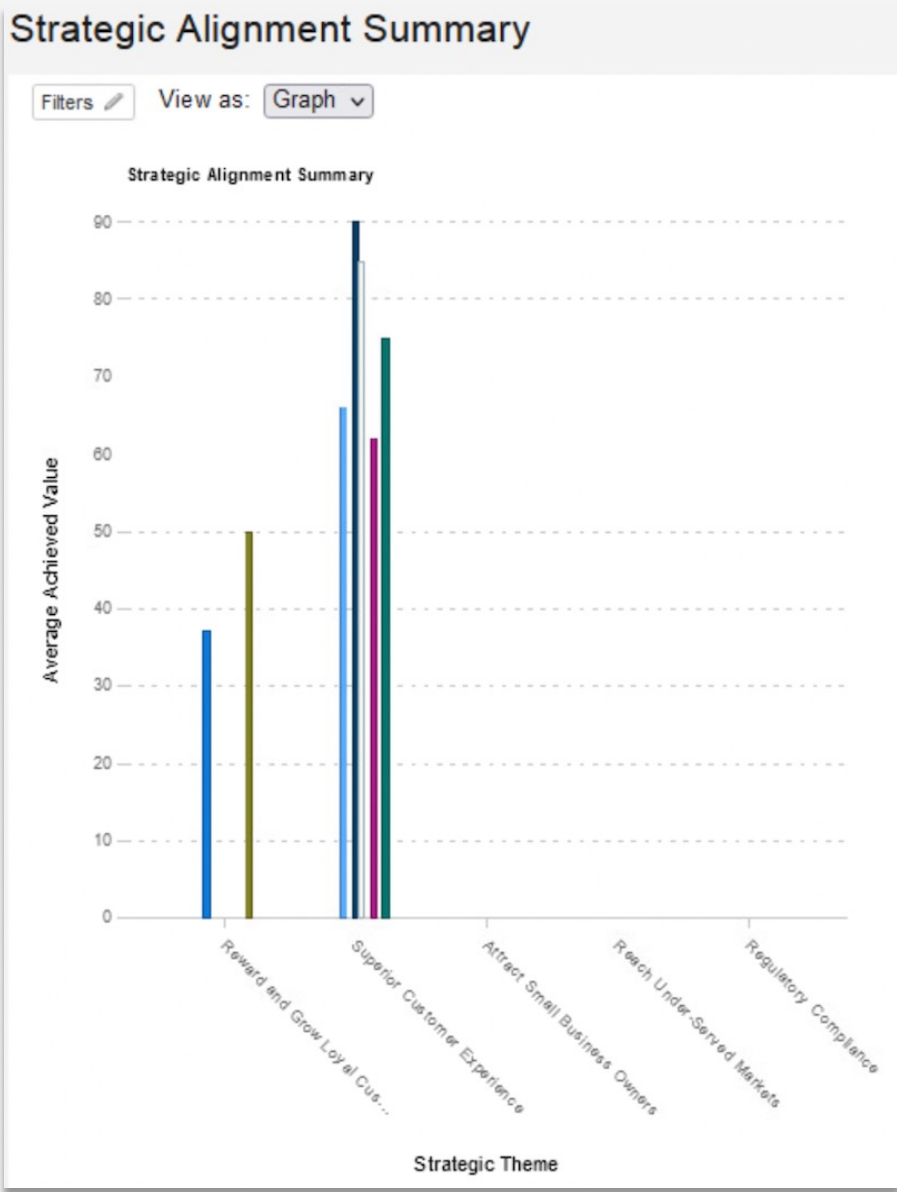
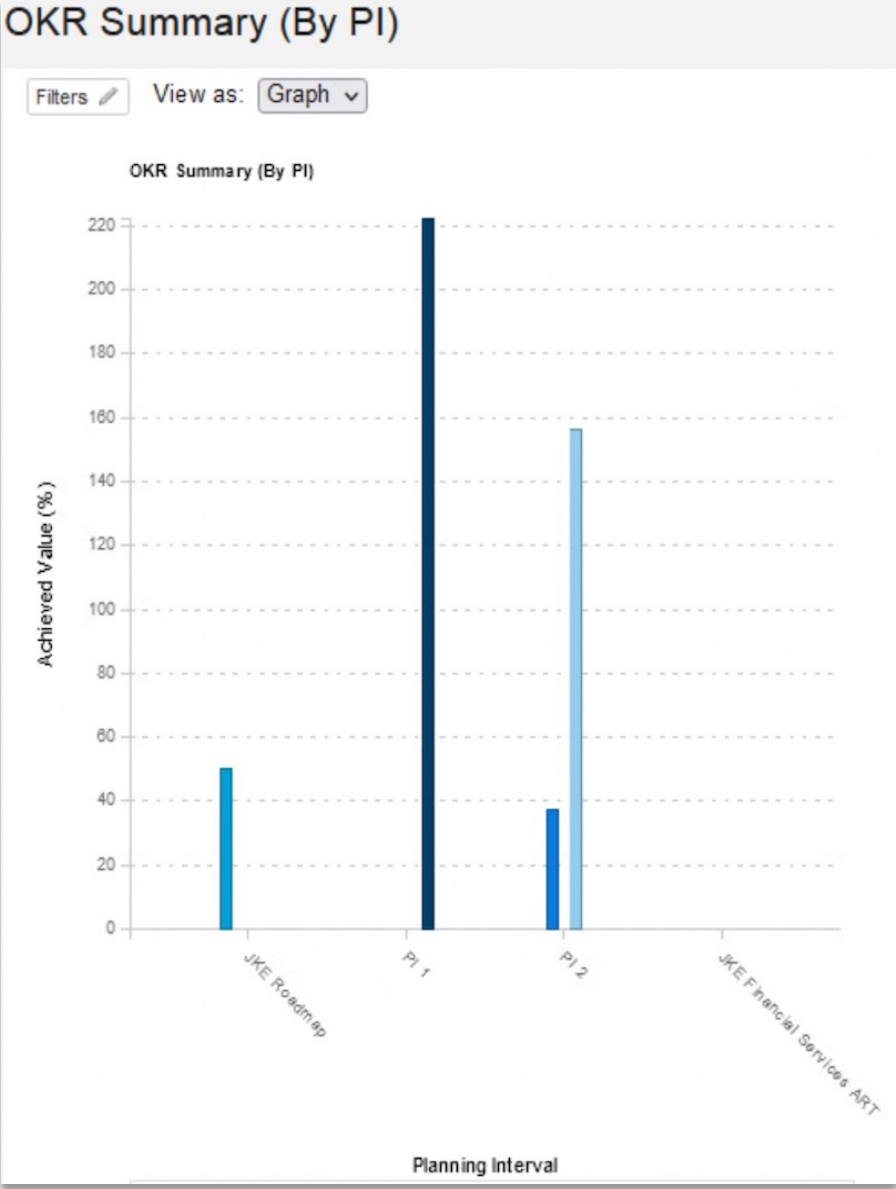
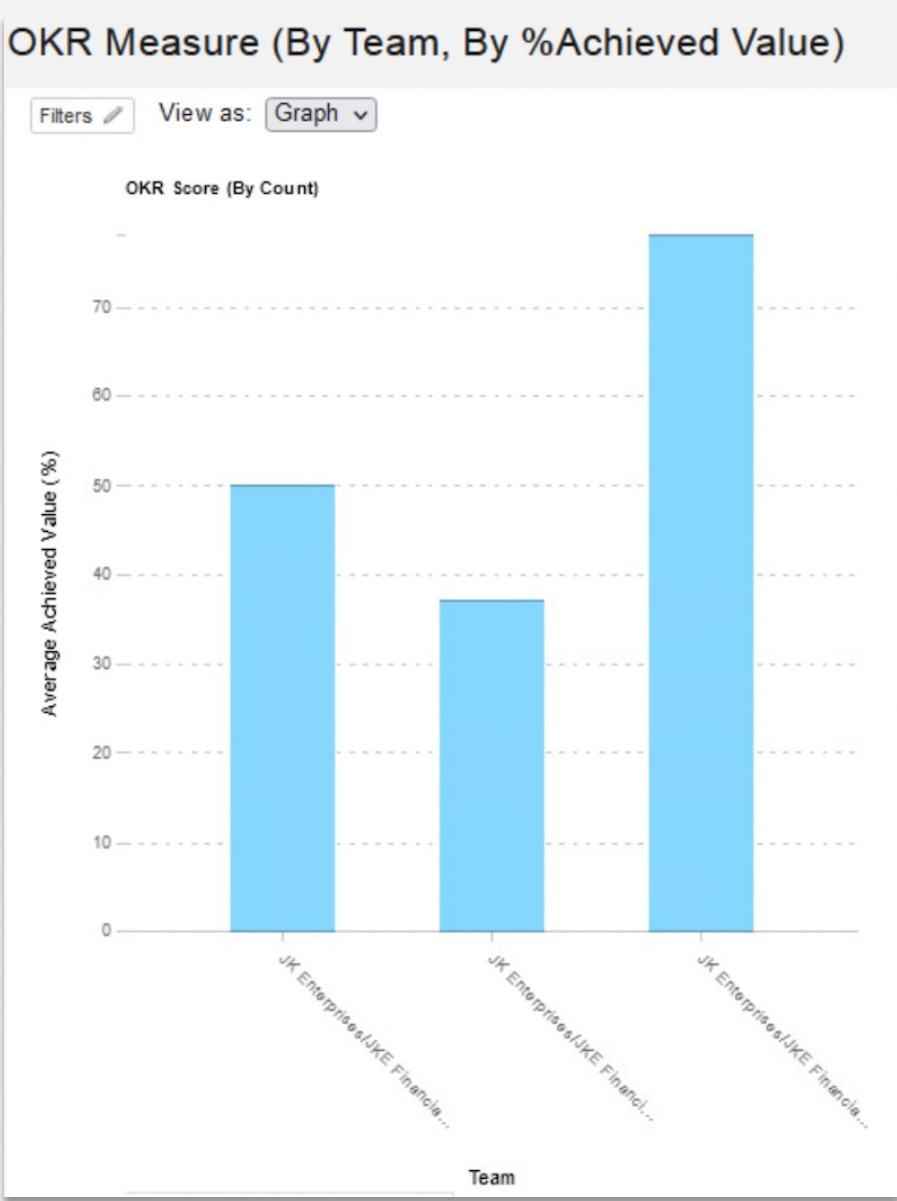
Flow Time is a measure of the time elapsed from start to completion for a given work item.

Establish clear goals and outcomes

- Use Objective-Key Results (OKRs) to:
- Enhance strategic alignment through specific and measurable actions.
 - Define business outcomes and effort for tracked epics in the Portfolio Kanban.
 - Set improvement goals and measure the success of a SAFe transformation.

Strategic Themes - Objectives									
<div>View As: Objective - Key Results Exclude (16 items excluded) Type to Filter Add Work Item</div>									
Summary	Scope	Owned By	Status	Filed Against	Proposed	Planned For	Children	Tracks	
Attract Small Business Owners	--	Paul	Approved	JKE Financial Services	--	JKE Roadmap	--	--	
Reach Under-Served Markets	--	Paul	Approved	JK Enterprises	--	JKE Roadmap	--	660: Achieve re	
Achieve revenue of \$10 million	Value Stream	Paul	Reviewed	JK Enterprises	--	JKE Roadmap	Links (2): 1, 2	--	
Superior Customer Experience	--	Rebecca	Approved	JK Enterprises	--	JKE Roadmap	--	662: Increase i	
Increase customer retention	Value Stream	Rebecca	Reviewed	JKE Financial Services	--	JKE Financial S	--	Links (2): 1, 2	
Improve efficiency of the drivin	ART	Bob	Reviewed	JKE Shared Services	--	PI 2	Links (2): 1, 2	--	
Increase customer engager	ART	Rebecca	Reviewed	JKE Account Management	--	PI 1	Links (2): 1, 2	--	
Reward and Grow Loyal Customers	--	Paul	Approved	JK Enterprises	--	JKE Roadmap	--	Links (2): 1, 2	
Delight our company customers	Value Stream	Susan	Reviewed	JKE Financial Services	--	JKE Roadmap	636: k_result 4.1	Links (6): 1, 2,	
Design product as per client'	ART	Bob	Reviewed	JKE Account Management	--	PI 2	Links (2): 1, 2	--	
Expand user base in existing a	Value Stream	Paul	Reviewed	JKE Financial Services	--	JKE Financial S	--	Links (5): 1, 2,	
Regulatory Compliance	--	Bob	Approved	JK Enterprises	--	JKE Roadmap	--	--	

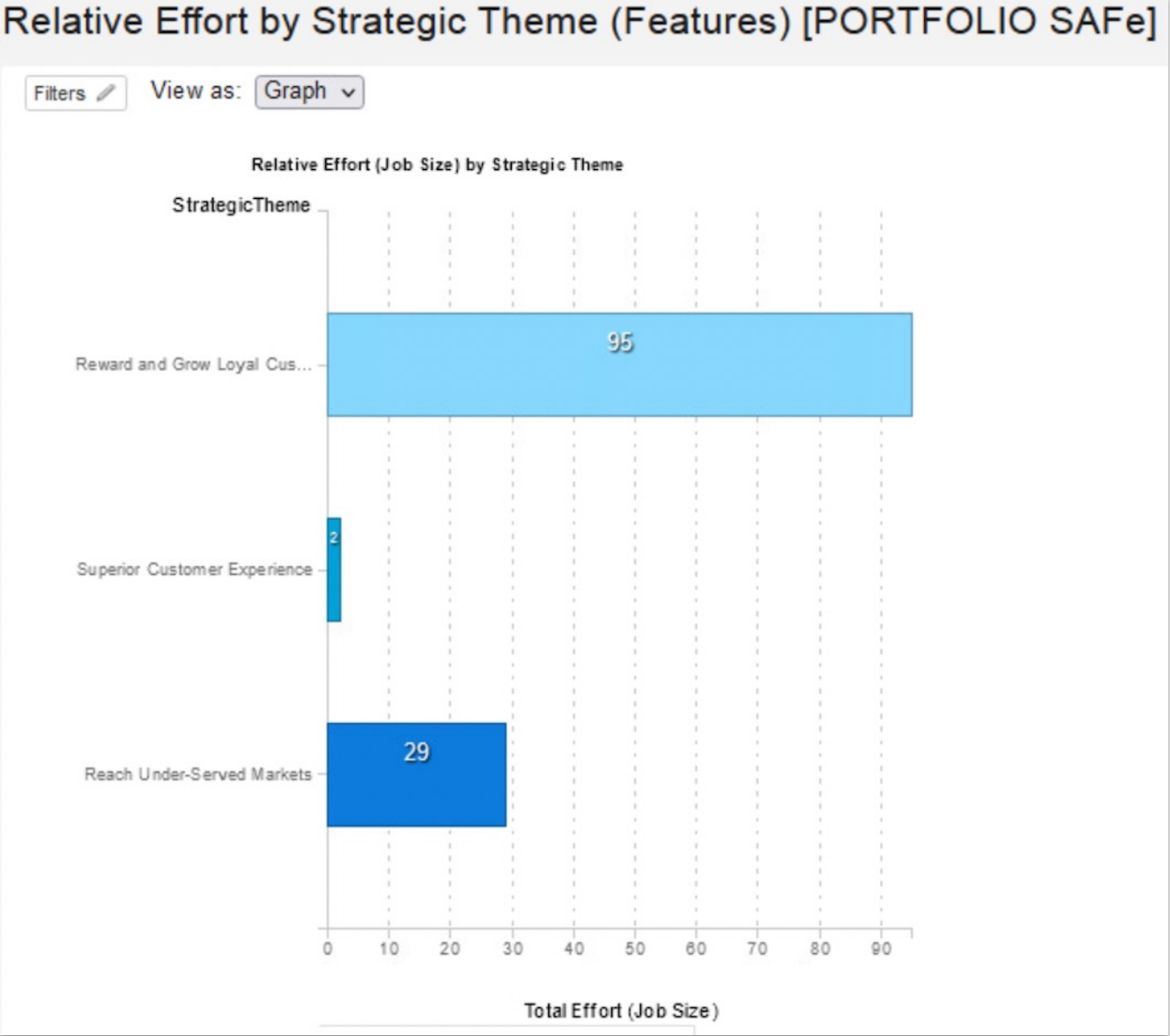
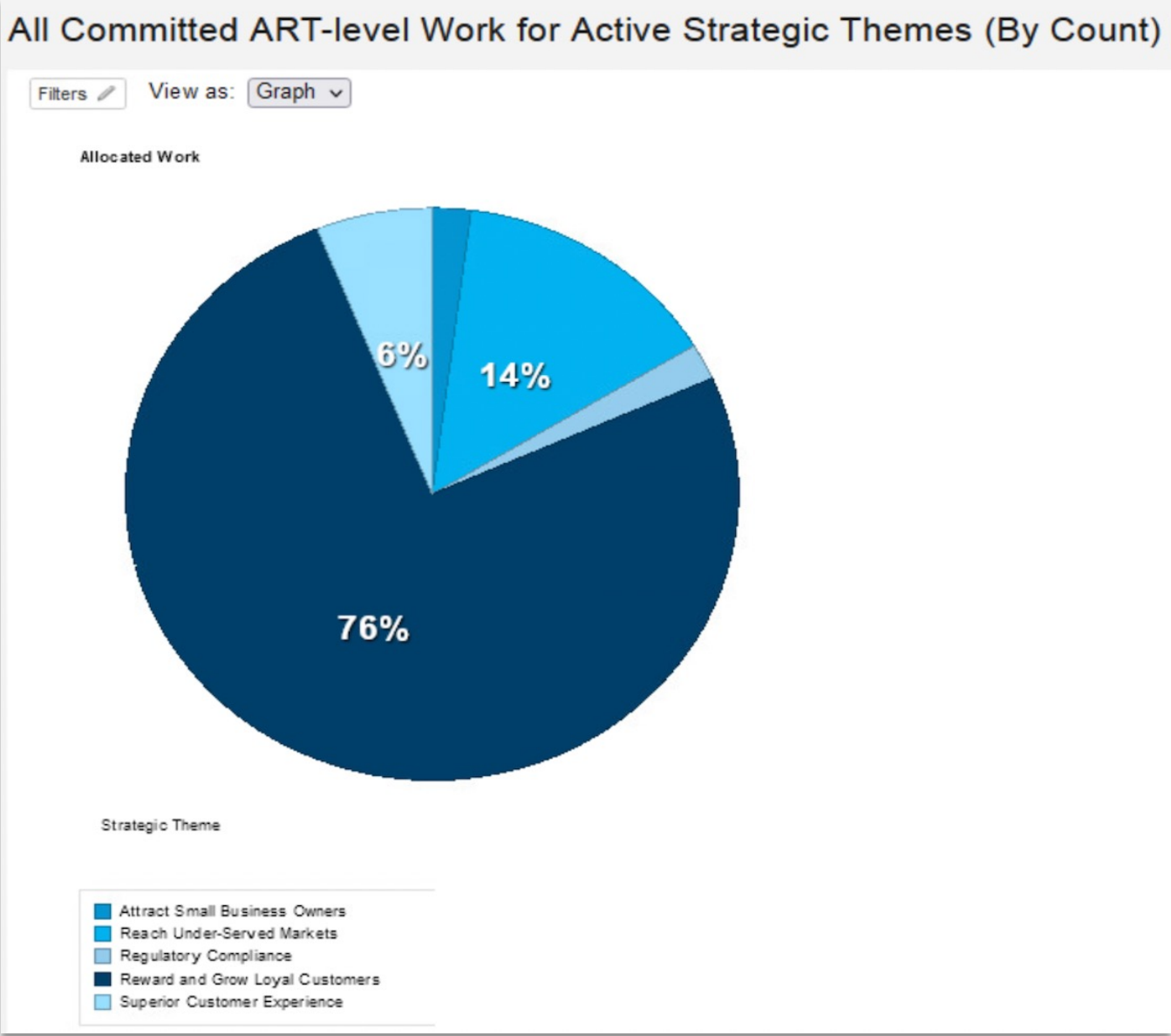
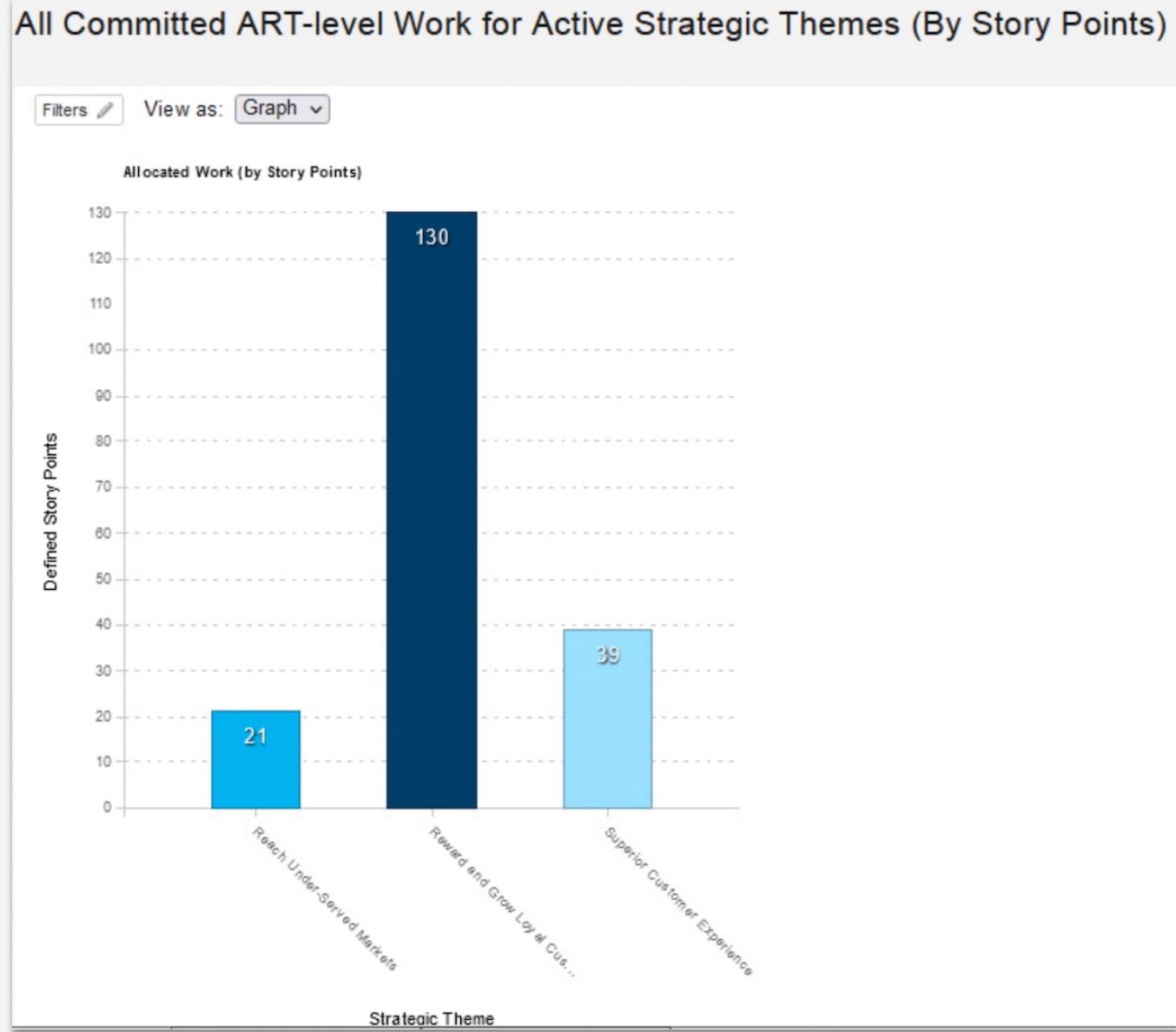
OKR Board				
Plan Items	New	In Progress	Reviewed	Done
<div>647</div> <div>Improve efficiency of the driving</div> <div>Paul</div> <div>JKE Shared Service</div> <div>PI 2</div>	<div>657</div> <div>Improve average weekly visits per</div> <div>Rebecca</div> <div>JKE Shared Service</div> <div>PI 2</div>	<div>656</div> <div>Increase non-paid (organic) traffic</div> <div>Rebecca</div> <div>JKE Shared Service</div> <div>JKE Roadmap</div>		
<div>648</div> <div>Design product as per client's</div> <div>Bob</div> <div>JKE Account Mane</div> <div>PI 2</div>	<div>658</div> <div>Design a draft and get approval from</div> <div>Unassigned</div> <div>Unassigned</div> <div>JKE Financial Serv</div>	<div>663</div> <div>Design a beta version of a product</div> <div>Unassigned</div> <div>JKE Account Mane</div> <div>PI 2</div>	<div>659</div> <div>Meet with client to understand design</div> <div>Susan</div> <div>JKE Account Mane</div> <div>JKE Financial Serv</div>	



Align Portfolio to Strategic Themes

Provide business context for portfolio strategy and decision-making, representing aspects of the enterprise’s strategic intent, through associations to related Organizations (Value Stream, Solution Train, or ART) and tracked Objectives at various levels of the organization.

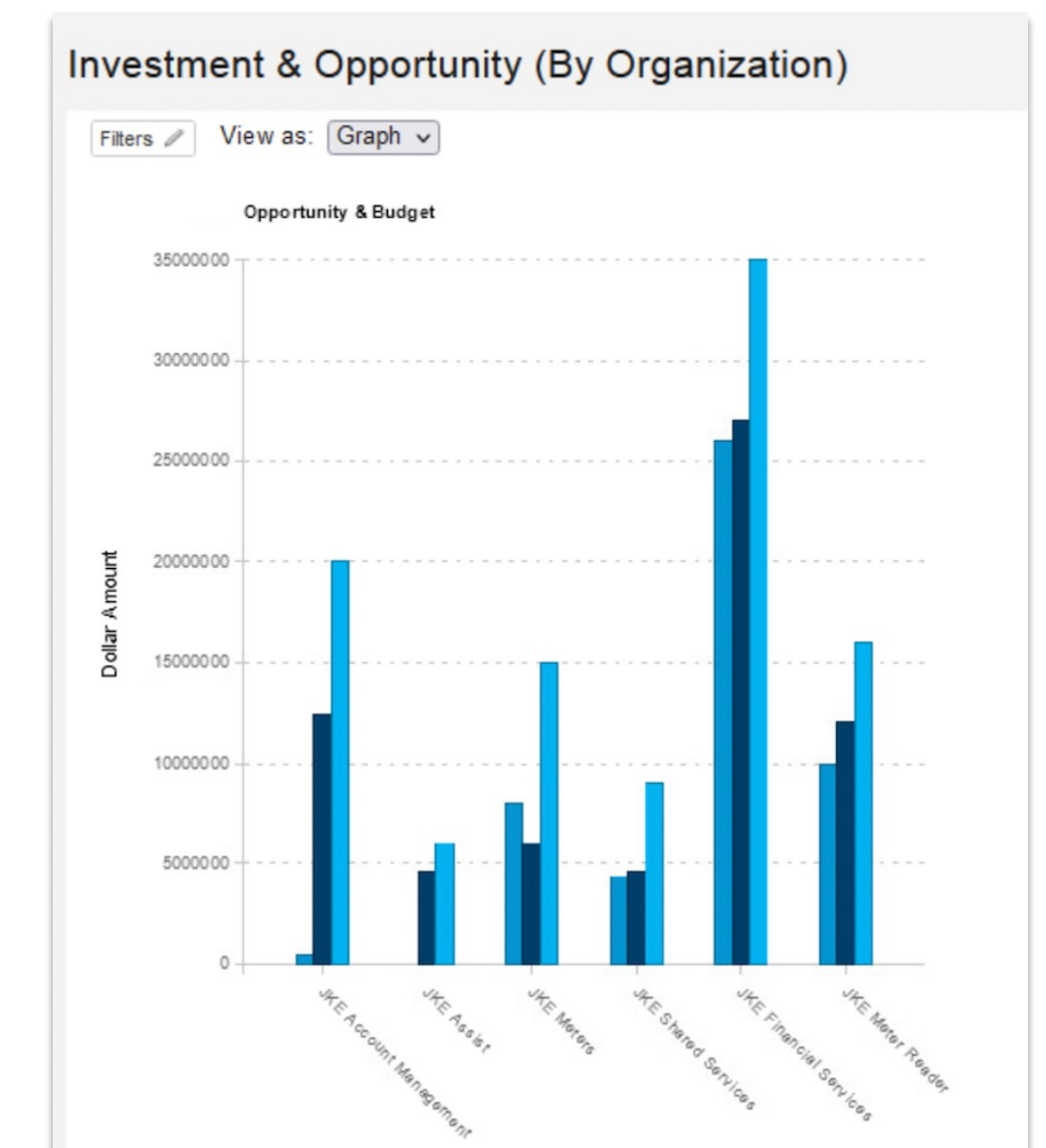
Strategic Themes									
	Summary	Owned By	Status	Planned For	Value to Customer	Impact on Business	Impact on Competition	Tracks	Related
	Reach Under-Served Markets	Paul	Approved	JKE Roadmap	60% - Moderate	20% - Very Low	40% - Low	660: Achieve rev	Links (3): 1, 2, 3
	Superior Customer Experience	Rebecca	Approved	JKE Roadmap	40% - Low	20% - Very Low	20% - Very Low	662: Increase cu	Links (3): 1, 2, 3
	Reward and Grow Loyal Customers	Paul	Approved	JKE Roadmap	60% - Moderate	60% - Moderate	20% - Very Low	Links (2): 1, 2	Links (4): 1, 2, 3,
	Regulatory Compliance	Bob	Approved	JKE Roadmap	80% - High	20% - Very Low	20% - Very Low	--	644: JKE Meters



Establish Lean Budgeting

Adopt a financial governance approach that funds value streams instead of projects, accelerating value delivery and reducing the overhead and costs associated with traditional project cost accounting.

View the Total Market Opportunity as well as the budgeted and allocated investment (when specified) for each Organization in the Portfolio with details that include the budgeted and allocated capacity based on the investment and its alignment by Strategic Themes.



Lean Budgeting for Organization										
<div> View As: Organization Exclude (22 items excluded) Type to Filter Add Work Item </div>										
	Summary	Scope	Owned By	Total Market Opportunity	Allocated Capacity	Allocated Investment	Budgeted Capacity	Budgeted Investment	Related	Implem
	JKE Financial Services	Value Stream	Susan	35,000,000	85	26,000,000	100	27,000,000	640: Rewa	--
	JKE Account Management	ART	Susan	20,000,000	70	423,466	730,066	12,400,000	Links (4): 1	--
	JKE Shared Services	ART	Susan	9,000,000	10	4,324,366	273,455	4,600,000	Links (4): 1	--
	JKE Assist	ART	Susan	6,000,000	5	24,343	2,785,656	4,600,000	Links (4): 1	--
	JKE Meter Reader	Value Stream	Susan	16,000,000	10	10,000,000	10	12,000,000	--	--
	JKE Meters	ART	Susan	15,000,000	8	8,000,000	10	6,000,000	641: Regul	--

Organization

Scope

Budget

Strategic Themes

Updated Enterprise Agile Report Packages

New SAFe Reports to support Strategic Themes and OKRs

- New SAFe 6.0 Reports:
- Investment & Opportunity (By Organization)
 - Key Results (By OKR)
 - OKR Measure (By Team, By % Achieved value)
 - OKR Measure (By Team, By Count)
 - OKR Score (By Achieved Value)
 - KR Score (By Count)
 - OKR Summary (By PI)
 - OKR Summary (By Team)
 - Strategic Alignment Summary

- New Enterprise Scaled Agile Reports:
- Average Days in State (By Work Item Type)
 - Flow Distribution
 - Flow Efficiency (By Team, By Work Item Type)
 - Flow Efficiency (By Work Item)
 - Flow Load
 - Flow Time
 - Flow Velocity

Updated SAFe Reports to support new SAFe data model

- All Committed ART-level Work for Active Strategic Themes (By Count)
- All Committed ART-level Work for Active Strategic Themes (By Story Points)
- All Committed Team-level Work for Active Strategic Themes
- All Committed Team-level Work for Active Strategic Themes (By Count)
- Planned ART Roadmap with Value (By Team, By PI)
- Planned Portfolio Roadmap (By ART PI) [PORTFOLIO SAFe]
- Planned Portfolio Roadmap (By ART) [PORTFOLIO SAFe]
- Proposed ART Roadmap (By Team, By PI)
- Proposed Portfolio Roadmap (By ART PI) [PORTFOLIO SAFe]
- Proposed Portfolio Roadmap (By ART) [PORTFOLIO SAFe]
- Proposed Portfolio Roadmap (By Solution Train PI)
- Proposed Portfolio Roadmap (By Solution Train)
- Proposed Solution Train Roadmap (By ART)
- Relative Effort By Strategic Alignment (Capabilities)
- Relative Effort By Strategic Alignment (Features)

Deprecations & Updates to tags

- Deprecated SAFe Reports:
- Program Budgeted Report - Use SAFe 6.0 report Investment & Opportunity (By Organization)
 - Solution (Value Stream) Investment & Opportunity - Use SAFe 6.0 report Investment & Opportunity (By Organization)
- Changed Tags:
- PI burndown chart (weeks in PI) [DB2 Advanced SQL to Enterprise Agile Report]
 - PI burnup chart (weeks in PI) [DB2 Advanced SQL to Enterprise Agile Report]
 - Planned Features without associated Epic [PORTFOLIO safe] (Enterprise Agile Report to SAFe 6.0)

Updated SAFe reports to support terminology changes in SAFe 6.0

- Updated report names, descriptions, and conditions of all existing reports to support new naming guidance as per SAFe 6.0.
- The following terminology was used to replace:
- Program Increment with Planning Interval
 - Solution with Solution Train
 - Program with ART
 - Solution Epic with Solution Train Epic
 - Program Epic with ART Epic

Updated Documentation

We updated our guidance to help you make your SAFe 6.0 adoption in ELM easier and more successful

[How-to-use-the-SAFE-6.0-templates-in-ELM](#)

Step-by-step guidance to configure tooling environment for SAFe Portfolio, Large Solution, Portfolio or Essential SAFe 6.0 configuration in ELM 7.0.2 using SAFe 6.0 templates.

[Configuring SAFE 6.0 in existing ELM projects](#)

Step-by-step guidance to configure a SAFe V6.0 tooling environment by customizing an existing ELM project area.

[Enterprise Scaled Agile Reporting Guidelines](#)

List of reports available for your scaled agile tooling environment, how to import them into your environment, and the best practices for deploying the reports as widgets on your ELM dashboard(s).

[Enterprise Scaled Agile Domain Models](#)

Set of domain models for our support of SAFe 6.0 to better understand how the reports access the data and links across a system and define your own domain models that dictate how the reports may need to be altered for your specific environment.

Thank you

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