



IMPLEMENTING SAFe™ WITH JIRA

i BACKGROUND

The Scaled Agile Framework (SAFe) is a framework that describes the best practices, roles, activities and artifacts that many enterprises have used for implementing lean-agile practices at enterprise scale, developed through years of experience.

JIRA is a very widely used project management software tool and bug tracking system, by Atlassian, with over 25000 customers worldwide. JIRA Agile is the application for managing Agile teams using Kanban and Scrum. JIRA Agile can be customized to support SAFe framework and process.

Q AT A GLANCE

cPrime's JIRA SAFe product blends Atlassian's ALM Platform with the Scaled Agile Framework to develop a tool and process configuration for a large publishing company. cPrime's JIRA SAFe solution was a critical part of the technology transformation, providing one single ALM tool for all teams, enabling easier training effort and comprehensive rollup reporting giving them the ability to understand the total cost of ownership. cPrime's JIRA SAFe product solution brings end-to-end visibility of epics, features and stories and provides a single source of Agile data, reducing the labor need for reconciling, standardizing and normalizing.

Publishing company implements a process and technology transformation, aligning the Scaled Agile Framework in Atlassian's product ecosystem to gain quality, delivery and process governance.



PROJECT PAIN

The publisher had a project-centric view of the world. Teams were having trouble sizing work, they were struggling with story estimates and were experiencing pain with basic release planning. Dates continued to slip and QA was outside the Scrum teams. A project-centric strategy led to unrealistic workloads. "Concepts of program and portfolio were foreign ways of thinking relative to product delivery and as a result, program and portfolio concepts were used to describe a financial milieu."

DELIVERY CHALLENGES

The need to optimize their technology delivery in order to meet demand, deliver on time, keep teams motivated and excited about their work all while delivering consistent quality. "The business ultimately wants a IT Organization that consistently delivers faster, with quality and that can maintain a business-aligned economic view." Agile was solving many of these issues but not all. Being able to manage from a program level within a well-defined portfolio structure were aspirations to the final frontier. They needed a single tool that all Agile teams could leverage. This would simplify the training standards while providing a comprehensive reporting system that encompassed all Agile teams.

THE STARTING POINT

START CPRIME ENGAGEMENT

SAFe PROCESS IMPLEMENTATION

The Publisher moves to the SAFe framework and redefines value in quality, delivery and process governance. "SAFe promised a philosophy or method that allows us to assemble, prioritize and manage work within a unified portfolio and program framework." Soon after their first Agile Release Train, (ART), they see benefits from a program and portfolio level and can understand much of their costs in labor and resources. They are able to visualize and estimate WIP thresholds and estimate and size their work accurately and consistently in order to provide a true valuation of cost at each stage of the development.

JIRA SAFE TECHNOLOGY SOLUTION

cPrime was engaged to create, test, and implement a JIRA SAFe solution that addresses the publishers challenges. cPrime's Agile Coach and JIRA Expert, Brandon Huff, determined the publisher needs to deliver an appropriate solution. Based on this solution, training was administered to establish common understanding and usage. cPrime's JIRA SAFe technology configuration unites the application of SAFe principles with key JIRA functionality through a custom designed configuration. cPrime's services, implementation and support bring together one ALM tool that provides visibility and comprehensive reporting needed for strong portfolio and program management. The JIRA SAFe solution provides specific JIRA elements at each SAFe Level – Portfolio, Program, and Team levels. The solution contains custom workflows for each portfolio, program and team level, custom fields and screens for each issue type (epic, feature, story, risk, spike, etc.). cPrime also configured JIRA Agile Boards to help manage work and bridge together the SAFe hierarchy for value-stream reporting. Additionally, they established a hierarchy of issues across Portfolio, Program, and Projects to ensure visibility and planning.

cPrime found the right blend of process and technology elements that aligned a unique pattern of technology, culture and org structure. The understanding of moving to the SAFe framework would allow for an easier standard of education, support and reporting. cPrime's solution established principles that were configured to support process, terminology was defined, standardized and used consistently. The challenge that teams face with adopting SAFe and JIRA "out-of-box" was that teams faced issues with a gap in nested and reportable issue hierarchies. There are usually naming challenges as many teams were running multiple projects with no standards defined.



JIRA SAFE SOLUTION CONFIGURATION

In order to configure the JIRA SAFe solution, a number of elements were created and standardized in JIRA.

Projects:

Projects were created to allow specific permissions and visibility to each level of SAFe –Portfolio level, Program level, and Team level. While these are not actual projects, they are representative of the schemes to be applied at each level. It is recommended that this hierarchy be maintained for appropriate reporting and access.

Schemes:

There are many configuration options in JIRA for a project but, for ease of implementation, we only have a few schemes to apply to each project to implement JIRA SAFe elements.

Relationship/Hierarchy Management:

A solution was created to allow a hierarchy between all issues on all projects at all levels. This provided visibility and reporting on all work across the organization

Workflows:

While a standard workflow works fine for smaller teams, dedicated workflows for Portfolio, Program, and Team are required to align with SAFe needs. Each JIRA SAFe workflow was given custom states specific to each level to allow specific and simple reporting. This also avoids confusion when discussing the state of an issue.

Issue Types:

We were able to leverage many of the existing and native issue types in JIRA but some changes were made to the arrangement of the issues at each SAFe level. Natively, JIRA Epics exist at the team level so they can own and manage their Epics. In SAFe, this ownership of Features would happen at the Program level and thus the issue type has been removed from the Teams.

Screens & Fields:

Each Issue Type will have it's own screen to allow specific fields to be associated with it. Additionally, a number of custom fields have been created to support the JIRA SAFe solution. Many of these are based on SAFe concepts, analysis, and delivery.

Agile Boards:

Portfolio Board All Portfolio Project work is managed using a Kanban board. Since Epics will continually be identified and delivered, the Kanban board is ideal. The Program Project work is managed using a Kanban board. A Kanban board is also ideal for the Program level Features since work will continue to be identified and delivered. Team Boards The Team Projects are managed using a Scrum Board. Additionally, the teams can leverage the reporting in JIRA Agile.

JIRA SAFE SOLUTION OUTCOME

One Integrated ALM Tool that Aligns Business & the Economic View

“The business wants an IT organization that delivers consistently, faster, with quality, and can maintain a business-aligned economic view. To accomplish this we need tools which support a sound delivery process. We also need tools and processes that provide transparency in all aspects of our work (i.e., epics, features, stories, tasks, defects, spikes, risks, etc.) This process needs to enable our teams to move faster – and confidently. Realizing that much of our cost is in labor and resources – we need to be able to visualize and estimate our WIP thresholds, size our work accurately and consistently, and be ready to provide a true valuation of cost at every stage of development.”

Improved Value in Quality, Delivery and Process Governance

“Our ability to leverage our new SAFe version of JIRA provides numerous reporting opportunities that we have never had. The net-net is that we are accomplishing a number of goals:

A single ALM used by all our Agile teams – JIRA. The benefit was a simpler training effort and comprehensive reporting.

An effective tool that incorporates our newly adopted project management process – JIRA SAFe. The benefit was a tool aligned to support the process, end-to-end visibility of Epics, Features and Stories.

A single source entity for integration between JIRA and Innotas. The benefit was a single source of Agile data, less labor need for reconciling, normalizing and integrating data”



EVALUATION OF JIRA SAFE SOLUTION:

Thought Leadership Expertise in Agile and Atlassian Products

cPrime’s first visit was to provide a high-level overview class into the rudimentary uses of JIRA Agile. This class was filled with people who wanted to delve deep into the JIRA landscape. Brandon had to balance this advanced group with novice attendees who just needed to understand the fundamentals. They managed this delicate balance admirably. No one ever felt lost – or bored during the class. In fact, although I assisted in constructing the initial overview, Brandon really put together the final outline that was perfect for our initial goal: get people familiar with basic JIRA. Brandon’s second visit was a bit different. Coming in, following the migration, we worked together to set up JIRA SAFe in a way that aligned it with our implementation of the framework. There was a lot of coordination, collaboration, testing, and brainstorming. To be perfectly honest, as much as I wanted to work closely with him, there were times he had to grab me to ask a question or sit me down to make a decision on a path. I wasn’t the most accommodating person due to my daily distractions and business demands. Nonetheless, Brandon’s tactful “people” techniques demonstrated the following skills:

He showed that he was a true JIRA “Guru”. His high level of JIRA expertise was often called upon to make numerous approach decisions based on little input or oversight from me. His decisions were always calculated and on the mark. It is a fact that he is a quick learner. Proof being that he was quickly able to understand our culture and traits during a very compressed time window. The result – I always had confidence in his judgment.

He showed a tremendous degree of flexibility – At any time he could thoroughly walk us through a wide number of variations and options helping the team arrive at a sound approach or recommendation.

His knowledge of SAFe and other processes were always evident and having that extensive background allowed him to make suggestions that were always well-thought-out on multiple levels – not just on the technical implementation of the tool. This meant he just didn’t do something because I told him so. If I suggested something that appeared flawed, he was quick to offer me the time to bounce it around and together come up with a more sensible approach.

I hired Brandon (and cPrime) as an expert in SAFe implementation using JIRA. I never doubted, and Brandon never gave me cause