



Lean Global Project Interview Protocol
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Overview

The purpose of this interview is to help us understand how the company implements SAFe at the Team, Program, and Portfolio Level. We will use this understanding, combined with our observations, to create an “As is” model of the studied company’s processes at the Team, Program, and Portfolio Level. Some of the questions may seem obvious or redundant, but it is important to get each participant’s perspective on each question.

Confidentiality

With your permission we would like to record the interview, and transcribe your responses so that we can analyse and aggregate the data along with all the other responses we collect from your team.

The recording will not be shared with the company.

The transcripts will be anonymised so that your name will not be associated with any of your responses, and your responses will be difficult to trace back to the source.

Any data relating to the interviews will be securely stored.

Your identity will remain confidential. Your name will not be published and will not be disclosed to anyone outside the Lero team.

Please be assured that you have the right to withdraw from being interviewed at any time during the interview, and do not have to participate in this study if you do not wish to do so.

We anticipate that this interview will take about an hour.

Permission

This research project has been approved by the Faculty of Science and Engineering Ethics Committee at the University of Limerick, and is being facilitated by Dr Sarah Beecham, Dr. John Noll, Mohammad Abdur Razzak and Prof Ita Richardson from Lero -the Irish Software Research Centre, University of Limerick.

Demographics

1. Time at [in the company] .
2. Time on current project.
3. Current position.
4. Current location.
5. Previous position & company.
6. Total development experience.
7. Total domain experience.
8. Education and formal qualifications.
9. Gender.
10. Nationality.

Team Level

In SAFe, all teams are part of the Agile Release Train (ART); ARTs are the central construct of the program level. Teams are collectively responsible for defining, building, and testing software in fixed-length iterations and releases.

Project

1. How would you describe your current project?
2. How would you describe your project's current domain?
3. What is your role?
4. Have you met any of your remote colleagues?
5. Does geographic separation hinder the project?
6. Why do you think [the company] is employing distributed development for this project?
7. Have you had any training in Agile methods?
8. Have you had any training in distributed development?

Process

1. Describe your dev process.
 - a) How do developers test changes?
 - b) How are builds created for QA?
 - c) Is build machine a bottleneck?
 - d) How does "outside of sprint" work?
 - e) Are there separate QA tasks?
 - f) Are spikes time-boxed? How is effort accounted for?
 - g) Is sprint too short?
 - h) Does Product Owner ever make estimates?
2. Does the application domain restrict the process in any way?
3. How would you describe the previous process (before Scrum)?
4. What advantages does Scrum offer over that process?
5. What advantages did the previous process have over Scrum?
6. What is working well with Scrum?
7. What is not working well with Scrum?
8. What obstacles exist that prevent Scrum from working well?
9. What is the best aspect of Scrum?
10. What is the worst aspect of Scrum?
11. If there was one thing you could change, what would it be?

For the next two questions, rate your motivation on the following scale: Very low, Somewhat low, Neither low nor high, Somewhat high, Very high

12. How would you rate your motivation now?
13. How would you rate your motivation prior to introduction of Scrum?

Project/Program Level

At the program level, the development teams and other resources are applied to the ongoing development mission. At this level, teams, roles, and activities are organized around the ART which delivers a continuous flow of incremental releases of value. Program level also discovers, defines and develops features and enablers that are required by the business to realize the vision and roadmap.

Definitions

Vision

The Vision describes a future view of the solution to be developed, reflecting Customer and stakeholders needs as well as features and capabilities that are proposed to address those needs. It provides the larger, contextual overview and purpose of the solution under development. Vision appears on the spanning palette and can be applied at any level in the framework.

Roadmap

The roadmap communicates planned Agile Release Train and value stream deliverables and milestones over a time line. The roadmap includes committed deliverables and visibility into the forecasted deliverables of the next few PIs. It is developed and updated by solution and product management as the vision and delivery strategy evolve.

Program Metrics

The primary measure in SAFe is the objective measurement of working solutions. This is determined empirically, by demonstration throughout and at the end of every iteration and program increment. There are a number of additional intermediate and long-term measures as well, metrics that teams, programs, and portfolios can use to measure progress.

Milestones

Milestones mark specific progress points on the development timeline, and they can be invaluable in measuring and monitoring the progress and risk of a program. As opposed to phase-gate milestones, SAFe milestones are based on PIs, planned learning points, and fixed dates.

Releases

The goal of Lean-Agile is frequent delivery of valuable, working, and fully tested solution increments. This is accomplished via a stream of releases, each of which has been validated and approved for final efficacy of use and is accompanied by the documentation necessary to ensure successful application.

Program Kanban

The program Kanban helps ensure that features are analyzed prior to reaching an iteration boundary. They are estimated and prioritized appropriately, and feature acceptance criteria are established.

Program Backlog

The program backlog is the single, definitive repository for all the upcoming work anticipated to advance the Agile Release Train solution. The backlog consists primarily of features intended to address user needs and deliver business benefits; it also includes the enabler features necessary to build the architectural runway.

Weighted Shortest Job First

Weighted Shortest Job First (WSJF) is an economic model for prioritizing “jobs” based on product development flow. WSJF is calculated as the cost of delay divided by job duration. In SAFe, “jobs” are the epics, features, and capabilities that are developed by ARTs. There are three primary elements to the cost of delay: 1) user-business value, 2) time criticality, and 3) risk reduction-opportunity enablement value.

Program Increment (PI) planning

A Program Increment (PI) is the larger development timebox that uses cadence and synchronization to facilitate planning, limit WIP, provide for aggregation of newsworthy value for feedback, and ensure consistent program level retrospectives. It is composed of multiple development iterations and an innovation and planning iteration. Due to its scope, the PI also provides the cadence for consideration of portfolio level considerations and roadmaps.

Features and benefits matrix

Feature – A short phrase giving a name and some implied context; Benefit – A short description of the benefit to the user and the business; there may be multiple benefits per feature. Since features can span multiple user roles, SAFe generally recommends against using the user story voice to express them. Furthermore, the business is not usually familiar with user stories and it may cause confusion if the same format is used for both stories and features.

Enabler Feature

Enabler features occur at the program level, where they capture work of that type. As these enablers are a type of feature, they share the same attributes, including a statement of benefits and acceptance criteria, and are structured so as to fit within a single PI.

System Demo

The system demo is a primary mechanism for evaluating the full ART system and gaining feedback from the stakeholders. It occurs at the end of every iteration and provides an integrated, aggregate view of the new features that have been delivered by all the teams on the train in the most recent iteration. It provides the ART with a fact-based measure of current, system-level progress within the Program Increment.

Inspect and adapt workshop

Inspect and adapt (I&A) is a regular event, held at the end of each PI, that provides time to demonstrate the solution; get feedback; and then reflect, problem solve, and identify improvement actions. The improvement items can then be immediately incorporated into PI planning.

Release any time

SAFe provides a separation of concerns that provides development teams with the cadence and synchronization tools they need to manage complexity and rapid change in their environment, while allowing for either synchronous (occurring on the PI boundary) or asynchronous (occurring any time) releases of value to the market.

Architectural runway

Architectural runway provides one of the means by which SAFe implements the concepts of Agile architecture. This runway provides the necessary technical basis for developing business initiatives and implementing new features and capabilities. An architectural runway exists when the enterprise's platforms have sufficient existing technological infrastructure to support the implementation of the highest-priority, near-term features without excessive, delay-inducing redesign.

Agile Release Train

The Agile Release Train is a long-lived team of Agile Teams, typically consisting of 50 – 125 individuals. The ART aligns teams to a common mission and provides for a regular cadence for planning, development, and retrospective. Trains provide continuous product development flow and each train has the dedicated resources necessary to continuously define, build, and test valuable and evaluate-able capabilities every two weeks.

Project

1. How would you describe your current project?
2. How would you describe your project's current domain?
3. What is your role?
4. Have you met any of your remote colleagues?
5. Does geographic separation hinder the project?
6. Why is [the company] employing distributed development?
7. Have you had any training in SAFe or Agile methods?
8. Have you had any training in distributed development?

Process

1. Describe your development process from the PMO perspective.
 - a) How do you develop the (product) “vision?” (*This is about the **product**: what will it look like, do, solve, . . .*)
 - b) How do you develop the product “roadmap?” (*We need a concise definition*)
 - i. What do your program metrics comprise?
 - ii. How do you specify your milestones?
 - iii. How do you specify releases?
 - iv. Do you develop a program Kanban? If so, how? (*Don’t belabor this: if they don’t use it, move on*)
 - c) (How) do you develop a program backlog?
 1. How do you prioritise the backlog? Do you use “Weighted Shortest Job First?”
 2. Do you use a “features and benefits matrix?” (It defines the benefits of features:)

| Feature | Benefit |
|------------------|--------------------------------|
| pre-frobncation | allows random input |
| frobncation | provides human-readable output |
| post-frobncation | presents a pleasing layout |

3. Do you use “enabler features?” (Features that don’t provide direct user-value but rather enable the creation of user-valuable features. Example: test scaffolding to enable Test-First Design & development.)
- d) (How) do you do Program Increment (PI) planning?
- e) (How) do you organize your Agile Release Train (ART)? (If they even have ART)
 - i. Do you use an “architectural runway?”
- f) Other questions:
 - i. Do you perform system demos (of work on the ART, rather than the team increment)?
 - ii. Do you conduct an “inspect and adapt workshop?” This is an all-hands meeting of all *program* stakeholders at the end of a Program Increment (PI) that attempts to identify *improvement stories* that will increase velocity or improve quality of the next PI.
 - iii. Can you release any time?
 - iv. How do you develop an “effective solution?” (*Why do we ask this? This might be irrelevant.*)
2. Does your application domain restrict the process in any way?
3. How would you describe your previous process (before SAFe), at the Program Level? (*May not be a previous process if SAFe is not being used at Program Level.*)
4. What advantages does SAFe offer over that process? (*Omit if SAFe not being applied at Program Level.*)
5. What advantages did the previous process have over SAFe? (*Omit if SAFe not being applied at Program Level.*)
6. What is working well with SAFe from Program perspective?
7. What is not working well with SAFe from Program perspective?
8. What obstacles exist that prevent SAFe from working well from Program perspective?
9. What is the best aspect of SAFe from Program perspective?
10. What is the worst aspect of SAFe from Program perspective?

11. If there was one thing you could change, what would it be?

For the next two questions, rate your motivation on the following scale: Very low, Somewhat low, Neither low nor high, Somewhat high, Very high (Note: Ims has already answered these; might be redundant.)

12. How would you rate your motivation now? (*ON SCALE OF 1=very low to 5=very high; SEE ABOVE*)

13. How would you rate your motivation prior to introduction of SAFe?

Portfolio Level

In SAFe, the portfolio level is the level of highest concern. This level encapsulates the people and processes that provide funding and governance mechanisms to meet the strategic objectives.

Definitions

Strategic Themes

Strategic Themes represent the set of business objectives that drive the enterprise's investment in systems, products, applications, and services. *Align strategy to execution.* Enterprise executives collaborate with Enterprise Architect, Program Portfolio Management, and Portfolio Stakeholders.

Budgets

In SAFe, budgets are allocated to value streams, decreasing budgeting overhead and enabling lean portfolio management. *Allocate budgets by value stream and by business objective strategic theme.*

Business and Enabler Epics

Business Epics are large-scale development initiatives that realize business value. Enabler Epics are technical initiatives that support the development of those initiatives. *Manage the flow of epics in a Portfolio Kanban.*

Portfolio backlog

The Portfolio Backlog is the highest-level backlog in SAFe. "It provides a holding mechanism for the upcoming Business and Enabler Epics intended to create a comprehensive portfolio solution set, one that provides the competitive differentiation and/or operational efficiencies necessary to address the strategic themes and facilitate business success.

Portfolio Epic

Portfolio Epics are enterprise initiatives that affect multiple organizations and program increments. A Portfolio Epic affects multiple release trains.

Portfolio Hierarchy

Hierarchical portfolio management (HPM) is a multi-level management process to maintain and improve the portfolio composition that best fits the investor's preferences.

PI planning

Program Increment (PI) planning is a cadence-based, face-to-face event that serves as the heartbeat of the Agile Release Train (ART), aligning all the teams on the ART to a common mission and vision.

System Demo

The System Demo is a significant event that provides an integrated view of new features for the most recent iteration delivered by all the teams in the Agile Release Train (ART). Each demo provides ART stakeholders with an objective measure of progress during a program increment.

Solution Demo

The Solution Demo is where the results of development efforts from the Solution Train (e.g. multiple Agile Release Trains (ARTs) and the contributions from Suppliers) are integrated, evaluated, and made visible to customers and other stakeholders.

Enterprise architectural strategy

Enterprise architecture (EA) is a well-defined practice for conducting enterprise analysis, design, planning, and implementation, using a comprehensive approach at all times, for the successful development and execution of strategy

Project

1. How would you describe your current project?
2. How would you describe your project's current domain?
3. What is your role?
4. Have you met any of your remote colleagues?
5. Does geographic separation hinder the project?
6. Why is [the company] employing distributed development?
7. Have you had any training in SAFe or Agile methods?
8. Have you had any training in distributed development?

Process-Strategics

1. [Portfolio Manager] How do you determine strategic themes?
 - a) Do you drive growth through new product revenues?
 - b) Do you reduce investment in customer project?
 - c) Do you lead market through innovation?
 - d) Do you maintain share in customer segment?
 - e) Do you drive long term growth through enterprise investments?
 - f) Do you leverage common services across segments?
 - g) How do you formulate solution portfolio strategy? (Do you get any input from anyone?)
2. [Portfolio Manager] How do strategic themes drive creation of portfolio backlogs and epics?

- a) Do you define portfolio hierarchy?
3. [Portfolio Manager] How do you allocate budget to each strategic theme to ensure balanced delivery against organizational priorities?
 - a) Epic pipeline status
 - b) Projected R&D spend by innovation types
 - c) Epic risk vs. reward
 - d) Risk-adjusted ROI by strategic theme
 4. [Portfolio Manager] How do you prioritize features and epics within each strategic theme?
 - a) Do you use any scoring model to prioritize epics?
 5. [Portfolio Manager] How do you manage and adjust strategic themes in a sustainable fashion throughout the budgeting cycle?
 6. [Portfolio Manager] How do you interlock strategic themes with other operational processes across the enterprise?
 7. [Portfolio Manager] How do you manage or allocate funding for distributed team or newly acquired company in different country?
 8. [Epic Owner] How do you develop portfolio Kanban?
 9. [Epic Owner] How do you develop portfolio Backlogs? Whom do you collaborate in preparation of portfolio backlogs?
 10. [Epic Owner] How do you help product management team to split the epic into features and prioritize them in the backlogs?
 11. [Epic Owner] How do you participate in PI planning, System Demo, and Solution Demo?
 12. [Epic Owner] How do you help Agile Teams during research spikes?
 13. [Enterprise Architect] As an Enterprise Architect what is your primary responsibility?
 14. [Enterprise Architect] What are the aspects do you take consideration while developing enterprise architectural strategy?
 - a) Who decide about new technology?
 - b) Do decide about development and deployment infrastructure strategy?
 - c) Do you involve in interprogram collaboration such as Community of Practice (CoP)?
 - d) Do you take decision about the implementation strategy?