# DAVE'S NOTES—SCALED AGILE FRAMEWORK (SAFe) FOR INNOVATIONS

## Abstract

The Scaled Agile Framework (SAFe) is a lightweight reference model for quickly and inexpensively creating innovatively new solutions with the lowest possible risk and greatest possible chance of success.

## Purpose

The purpose of this technical note is to elucidate why and how SAFe can be used to explore, discover, create, and scale innovatively new products, services, and service products.

## Why

Quickly, efficiently, and effectively creating innovatively new solutions is critically important in today's global economy. That is, the ability of global firms to successfully introduce impactfully new solutions ahead of small, medium, and large competitors who are themselves innovating in parallel in fractions of a second. Therefore, today's enterprises need a lean-agile thinking model to quickly conceive, implement, deploy, measure, and scale innovations before global competitors can beat them to the punch. Over 95% of new innovations never make it to the market nor succeed. So, an innovation framework is needed to improve the odds of success with quick, impactful, and inexpensive discovery cycles before scaling a bad solution falls flat on its face.

## What

SAFe enables firms to quickly and successfully conceive, implement, deploy, and scale high-quality innovations with short lead and cycle times. SAFe allows global firms to strategize, roadmap, plan, design, implement, deploy, measure, and rinse-and-repeat inexpensive low-risk market experiments in rapid cycles until impactful solutions are identified and low-risk scaling decisions are made. SAFe has been successfully applied to many industries, markets, operations, and technologies such as AI, Clouds, IT, networks, finance, insurance, legal, contracts, auditing, sales, marketing, human resources, training, education, etc.

## How

SAFe's secret sauce is its highly unique infusion of lean-agile thinking values, principles, practices, and measures. Simplicity is the heartbeat of SAFe. That is, apply the minimum set of tools that are necessary to get the job done. SAFe is the right tool for the right job almost every time! You have to pack light if you're going to take a trip across the globe on a moment's notice, which is the perfect metaphor for quickly creating enormously successful global solutions. SAFe contains a pinch of lean thinking, a relentless focus on simplicity, lightweight roadmaps, collaborative planning, a generous helping of small experiments in short rapid cycles, and the use of qualitative innovation metrics to spot early market trends. SAFe provides the ability to sift through the noise, discard unprofitable ideas, pick a winner, quickly scale it up, and then measure revenues, sales, and profits.



## Details

SAFe provides a simple set of tools for managing the introduction of innovatively new solutions to global markets. SAFe provides simple, lean, and lightweight tools for strategizing, forming OKRs, quickly identifying visual value streams, developing simple roadmaps and pipelines of ideas, and prioritizing ideas based on fun and easy-to-use qualitative measures. SAFe also suggests simple and easy-to-use practices for collaboratively planning your first innovation in an enjoyable manner, designing modularized and containerized solutions with the smallest number of dependencies and constraints possible, quickly implementing simple inexpensive solutions without the hassle of pressure or long hours, and then instantly measuring and seeing the results. The core of SAFe is the small cross functional innovation team, which is empowered to have fun, self-organize, collaborate, be creative, and apply lightly structured pull-driven systems like Scrumban to quickly, painlessly, and
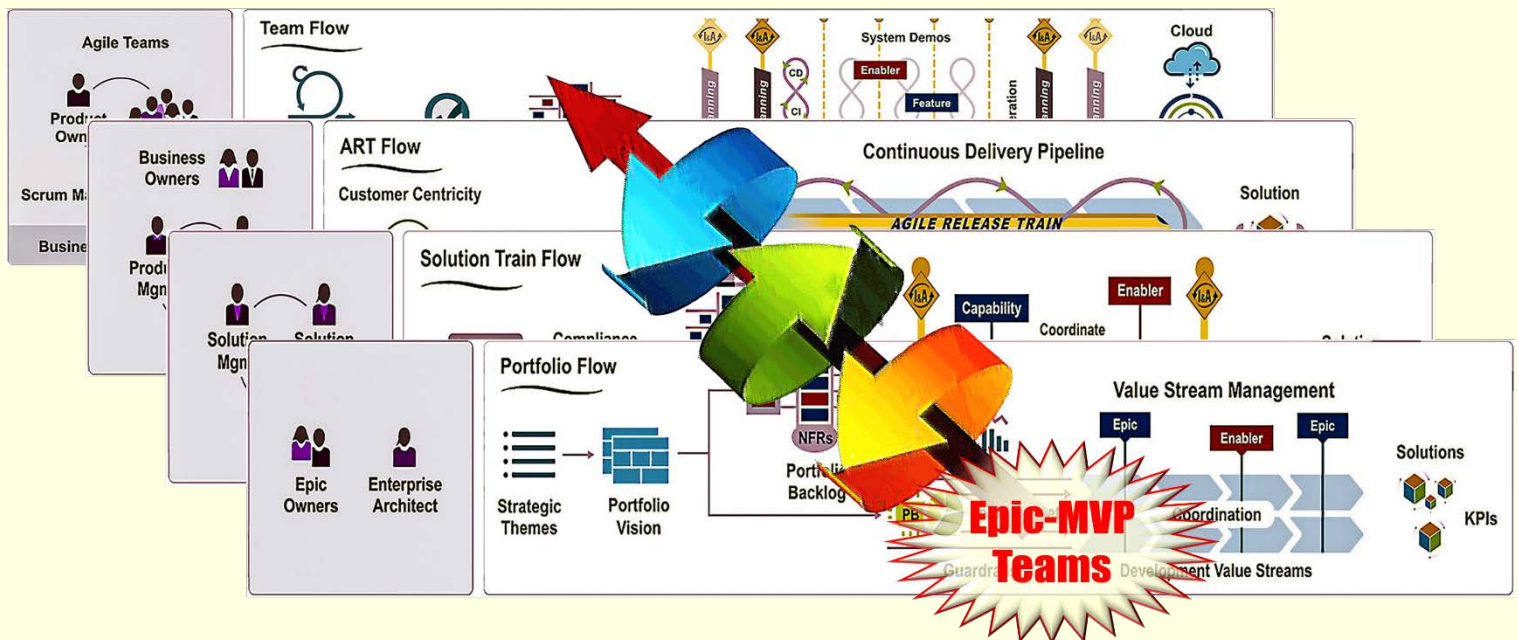
easily squeeze out global innovations without manufacturing practices. SAFe provides measures to quickly separate the wheat from the chaff to identify potential market winners. The same SAFe tools which make innovation fun, fast, and enjoyable may then be used to quickly scale up to more robust products, services, or service products with the least amount of pain possible.

## Conclusion

And there you have it! SAFe is more of a conceptual model, idea, outline, and sketch for successfully creating global market innovations. It provides you with the kernel or essence of lean thinking necessary to go from concept to cash in no time flat. Ideas come a dime-a-dozen, most of them are not worth their weight in gold, few of them will succeed, and planning a bad, complex, expensive, and long-term solution never works. Executives and decision makers are not keen on investing in yet another expensive market loser. Innovators may not have the trust of executives to risk their hard-earned resources. So, SAFe is a win-win solution for skeptical executives and eager innovators to meet in the middle; quickly conceive, plan, and implement low-risk, low-cost innovations with minimal constraints, overhead, and complexity; and satisfy business goals and objectives with an infusion or constant stream of small, painless, and impactful innovations with a big, visible, and satisfying payoff!

## Example

Let's use Susan the young, smart, ambitious, and entrepreneurial museum curator, as an example. Her museum director challenged Susan to renovate his rapidly decaying museum, exhibits, attendance, and revenues on a shoestring budget. Susan could come up with an unproven idea for the renovation, pay an expensive architect for a blueprint, and labor over an ironclad business case. Worse yet, she can devise a thousand-page project plan, meticulous schedule with inconceivable dependencies and constraints, input these data into a project management tool, and hope her director approves a bottomless budget for a broad sweeping museum renovation. However, Susan wisely decides to apply SAFe instead to quickly identify, implement, evaluate, and sort through the bad solutions to quickly find one that works without losing the patience of the stubborn museum director. In other words, Susan needs a quick win now, because she intuitively knows that "A bird in the hand is worth two in the bush!" She quickly devises a simple OKR, brainstorms a list of possible innovations with her team, prioritizes them using gamified techniques, devises a simple roadmap, and selects a simple low-cost idea with the potential for a high payoff.

Susan's team then brainstorms a design for a new exhibit using Dual Track Development, Lean UX, and Design Sprints, and quickly and inexpensively implements a rapid prototype or facade without too much depth and expense in 2 to 4 weeks. Susan's team has much pride in workmanship and has an eye for detail in spite of their limited time and budget, so each inexpensive design and revision look exquisite! Susan's team then collects feedback from other curators, customers, and art enthusiasts. Susan's team rinsed-and-repeated a few times to work out some of the kinks, criticisms, and incorporate valuable suggestions from her colleagues. After getting the initial idea just right, Susan's team opens up her solution for a general showing with other routine exhibits and collects more feedback from live customers. Then, she rinses and repeats a few more times as necessary.

After a few short months, Susan's team makes a pivot-or-persevere decision on whether to continue with her first idea or select the next one on the roadmap. After some trial and error, adding more ideas based on feedback, and reprioritizing the roadmap, Susan's team eventually converges upon a winner and customer engagement skyrockets. She then uses the final feedback to help her director make a data-driven decision instead of using hunches, intuition, and gut-instinct as he's done all throughout his 50-year career. He agrees to allocate more resources to refining Susan's successful solution and implementing more ideas on her roadmap. Susan's team applies SAFe a few more times, reworks her roadmap based on emerging data, and rapidly creates a small portfolio of successful innovations on a shoestring budget which flowered from her small original idea.

Her director is so pleased with the museum's direction that he retired and appointed Susan as the new director since she now has a proven track record of success on a shoestring budget. He simply realized how quickly Susan righted-the-ship. That's exactly the kind of vision, spirit, and culture the museum director wanted to instill in Susan before he happily retired. That is, the ability to satisfy its stakeholders and customers with lean budgets and innovations instead of short-term sales to ensure the long-term legacy of his museum. He proudly enjoys reading articles about the success of his museum throughout his retirement.

Reflecting back on her own journey, Susan is glad she used the "essence of SAFe" to achieve fast impactful outcomes instead of obsessing over thousand-page plans; complex project schedules with irreconcilable dependencies; multimillion dollar project budgets from banks, donors, and grants; and indirect proxy measures and outputs like cost-and-schedule performance indices.

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