



Susanne Bartel

susanne@flow.hamburg

Twitter: @SusanneBartel,  
@FlowHamburg

Lean Kanban North America 2018

# Kanban in SAFe waters

flow.hamburg

PLAN SYSTEMS. MANAGE WORK. LEAD PEOPLE.



Experience  
Report

~~SAFe-  
Intro~~

Kanban  
Coaching  
Tools


Reflec-  
tion



**The company: A private bank in Germany**

**IT Organization (300 people) split into:**

- **Development and**
- **Operations**



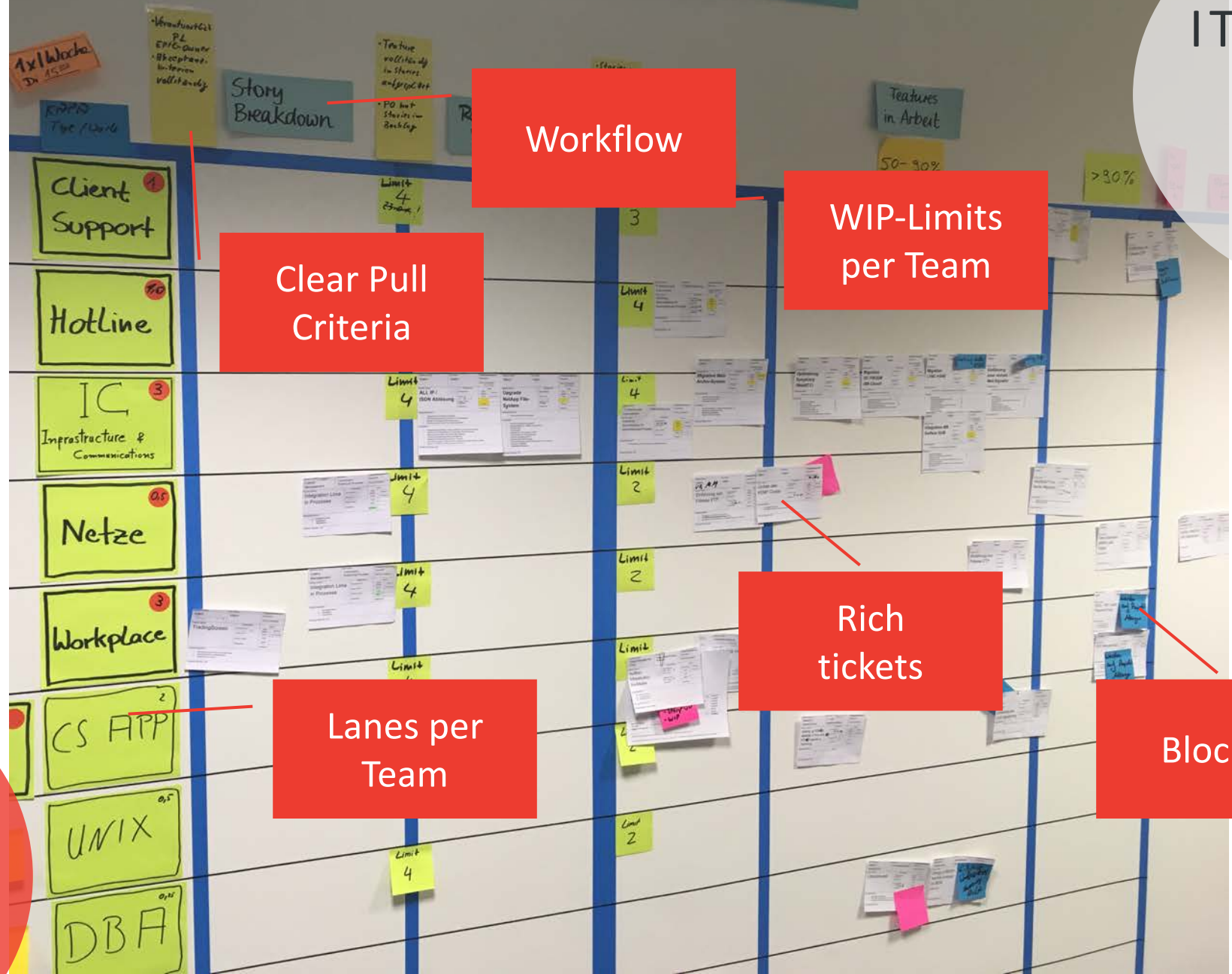
Kanban Management  
Professional training  
with mixed group from  
across IT

Feb '18



# IT Operations Portfolio

# IT Operations Portfolio Board



Workflow

WIP-Limits per Team

Clear Pull Criteria

Rich tickets

Blockers

Lanes per Team

Mar '18

Split into stories / tasks

Back-LOG

Ready to pull

WIP

DONE

Change

Interne Verbesserung

For EPIC (Portfolio Board)

Features from Portfolio

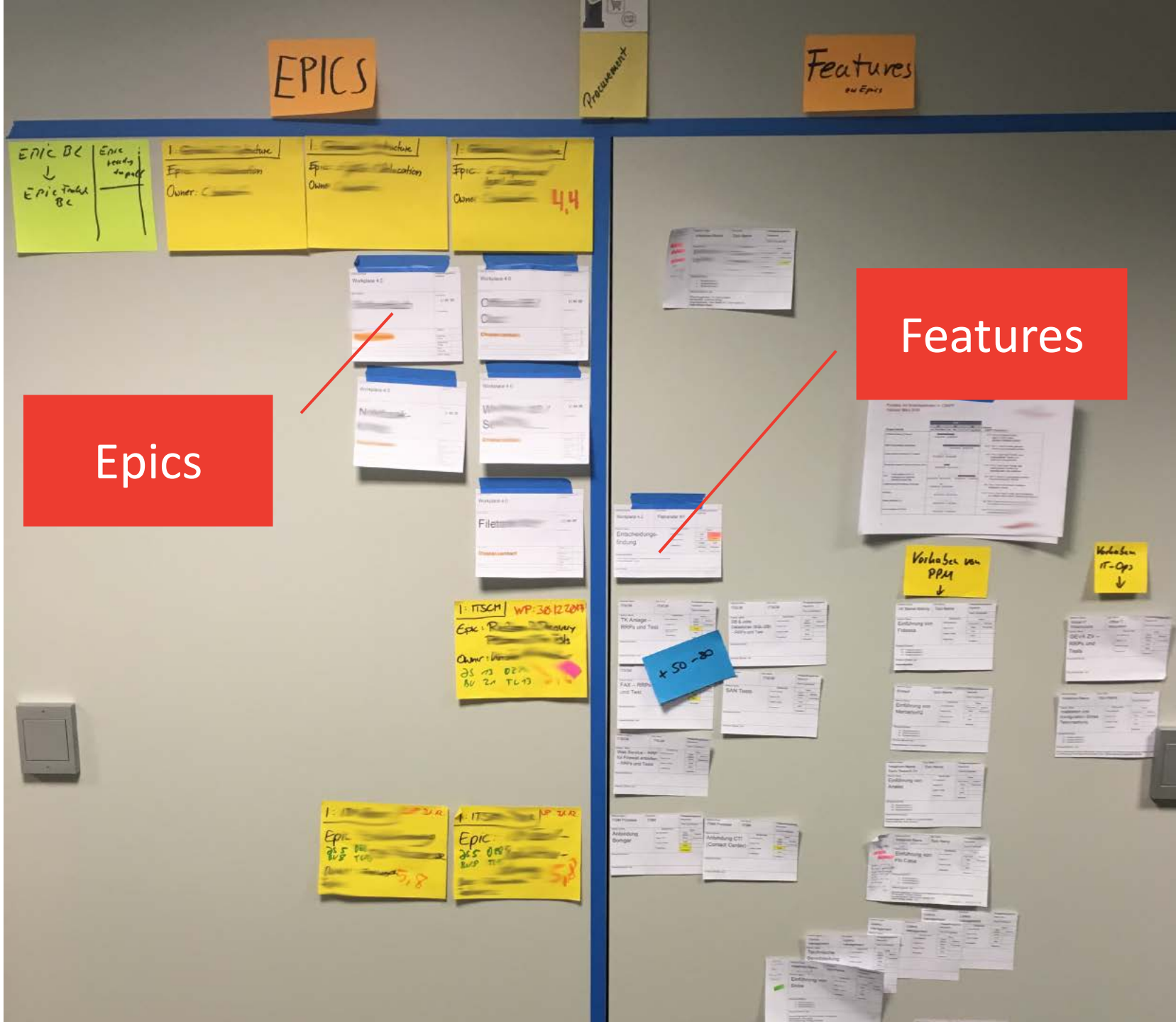
One of a dozen team boards

Mar '18



# Emerging Upstream Board covering all of IT

Mar '18





# Kanban Maturity Model

Where they came from

As of today

- Defined processes
- Still some inconsistencies in delivery
- Some first ML 3 patterns emerge



- Work pushed
- Political leverage
- Overload
- Local optima

# Let's rewind to the start!



2016

2017

2018

# 2016: Start of „Innovation Program“

- Goal: Innovative capability, flexibility, increase performance and management abilities in the IT organization
- Company's strategic direction given by partners
- How: Make the whole IT “agile”
- First Step: Development Group. Cross-functional change team formed
- Created Vision: „We will revolutionize the finance world“
- Scaled Agile Framework (SAFe) was selected as agile framework
  - Perceived as simple answer to how to scale and align an organization
  - A set of processes, roles, artefacts from the SAFe framework to be implemented.
- In 2016, successful implementation of SAFe in the Development group (mostly Scrum on team level)



## IT Operations in a private bank

Need for fast response,  
Potentially high costs,  
High share of irrefutable,  
unplanned demand.

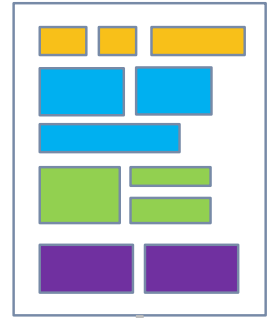
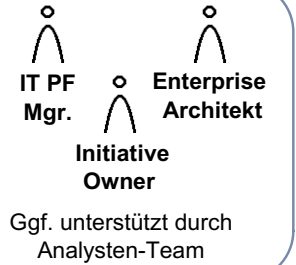
# IT Operations – the Challenges

- Grown development department a more demanding customer
- Increasing pressure to keep up
- Announcement: „Operations becomes agile“
- Start of the transition at the end of 2016, modeled after the SAFe implementation in the development department

IT Portfolio

SAFe already up and running in Dev, with mostly Scrum

Epics:



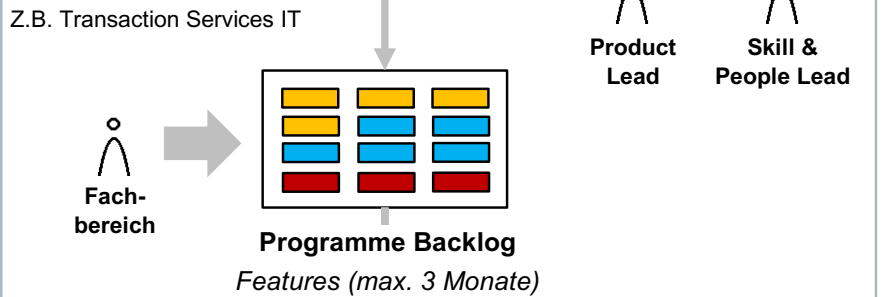
Portfolio Backlog Epics

Strukturierung in Features:

- Eindeutige Zuordnung zu Programm
- Max. Umsetzungsdauer ein Produktinkrement
- Priorisierung nach WSJF

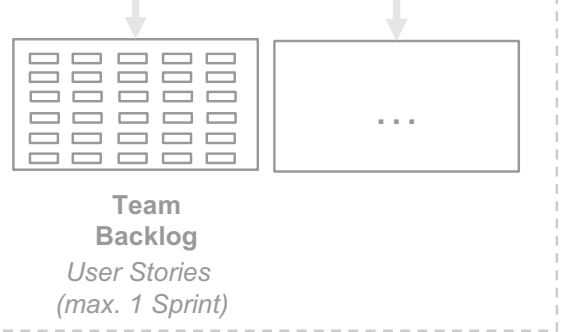
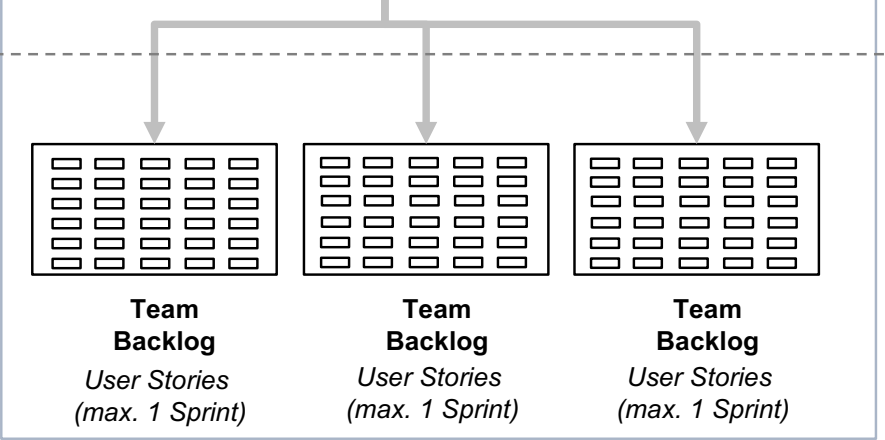


Programme



3 Programmes (Infrastructure Frontend, Backend, Client Services) established with Product Leads and Skill and People Leads

Produktteams

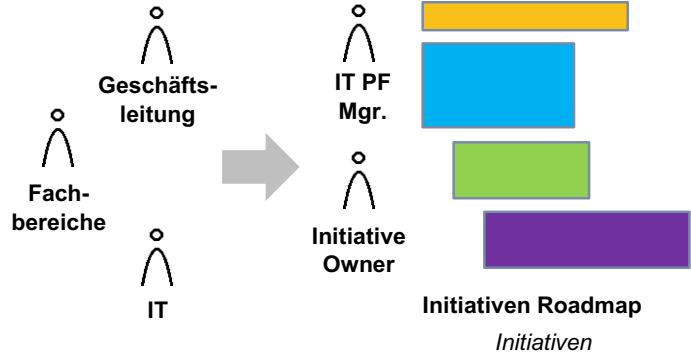


# The coaches' mission from Feb 17

”

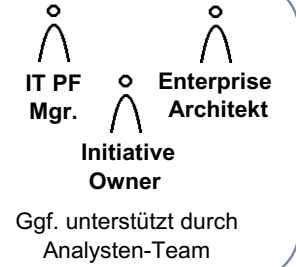
Shift Operations  
Teams to Kanban

IT Portfolio



**Strukturierung in Epics:**

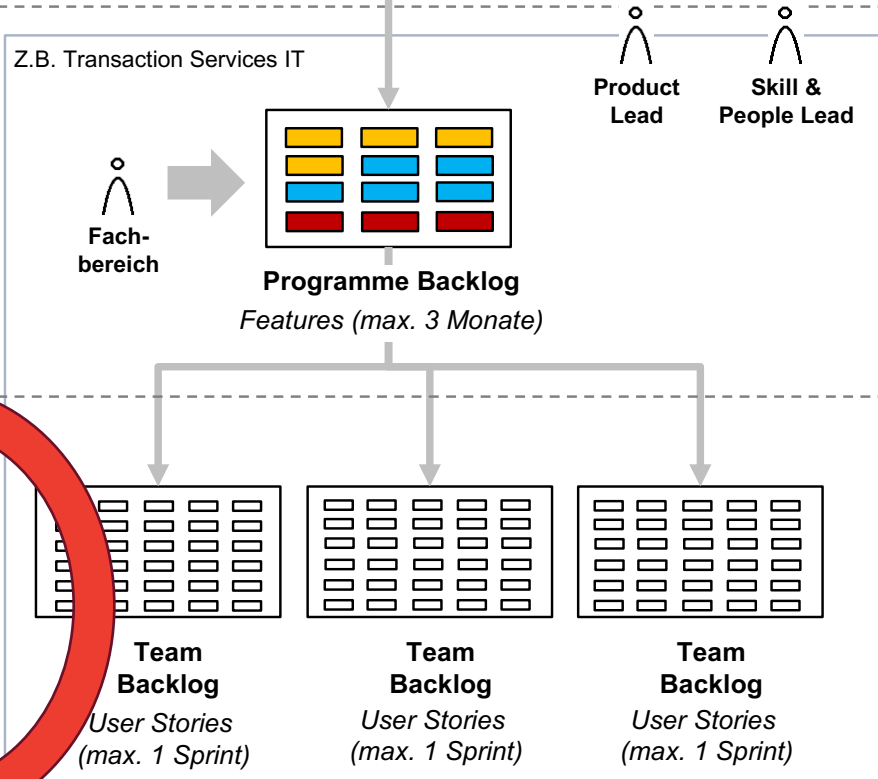
- Eigenständiger Nutzen bzw. Business Case
- Budgetzuordnung



**Strukturierung in Features:**

- Eindeutige Zuordnung zu Programm
- Max. Umsetzungsdauer ein Produktinkrement
- Priorisierung nach WSJF

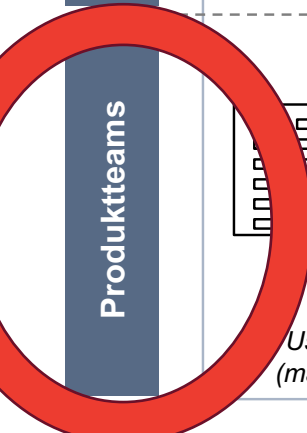
Programme



Start in 2 programs (Infrastructure Frontend and Client Services) with 6 teams in total

The assignment: Introduce Kanban in these 6 teams

Produktteams





# The Plan at the beginning of 2017

- Work based on newly established SAFe organizational structure
- Make teams „agile“ by doing Kanban
- Done!

...and SAFe consultants gone ;)



# Half-day Workshops „Understanding Kanban“ (End of February)





# STATIK

Systems Thinking Approach to Introducing Kanban

# STATIK

## Systems Thinking Approach to Introducing Kanban

### Per Service:

1. Sources of dissatisfaction
2. Demand vs.
3. Capabilities
4. Workflow
5. Classes of Service
6. Kanban System Design



Team  
roles!

Agile Master  
Product Owner  
Solution Architect

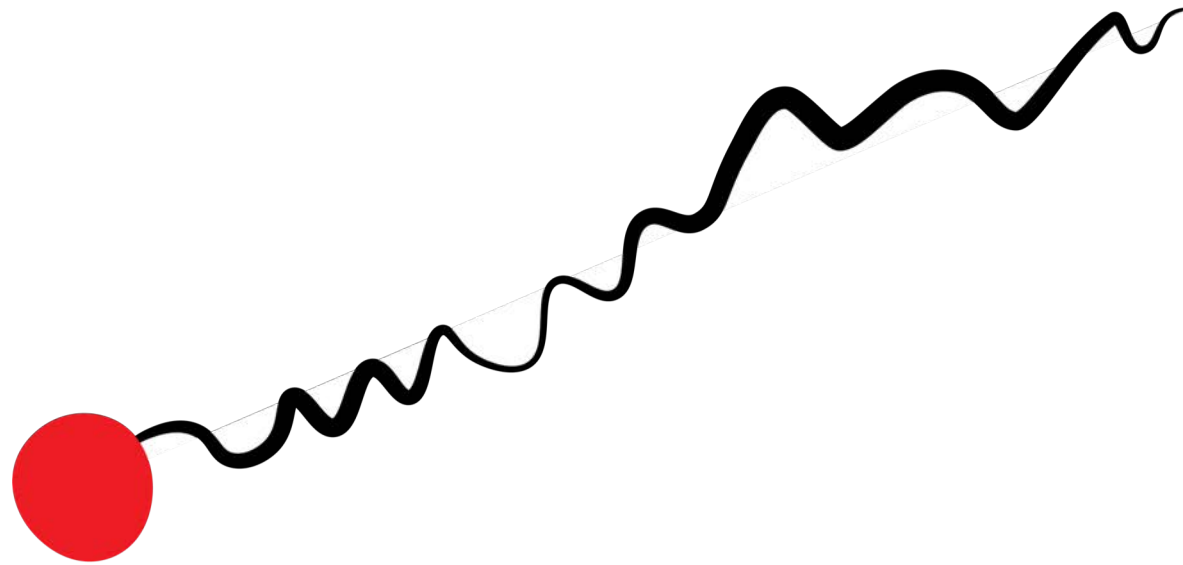
*Medicines & Bandages*

# FIRST AID CASE



*Medicines & Bandages*

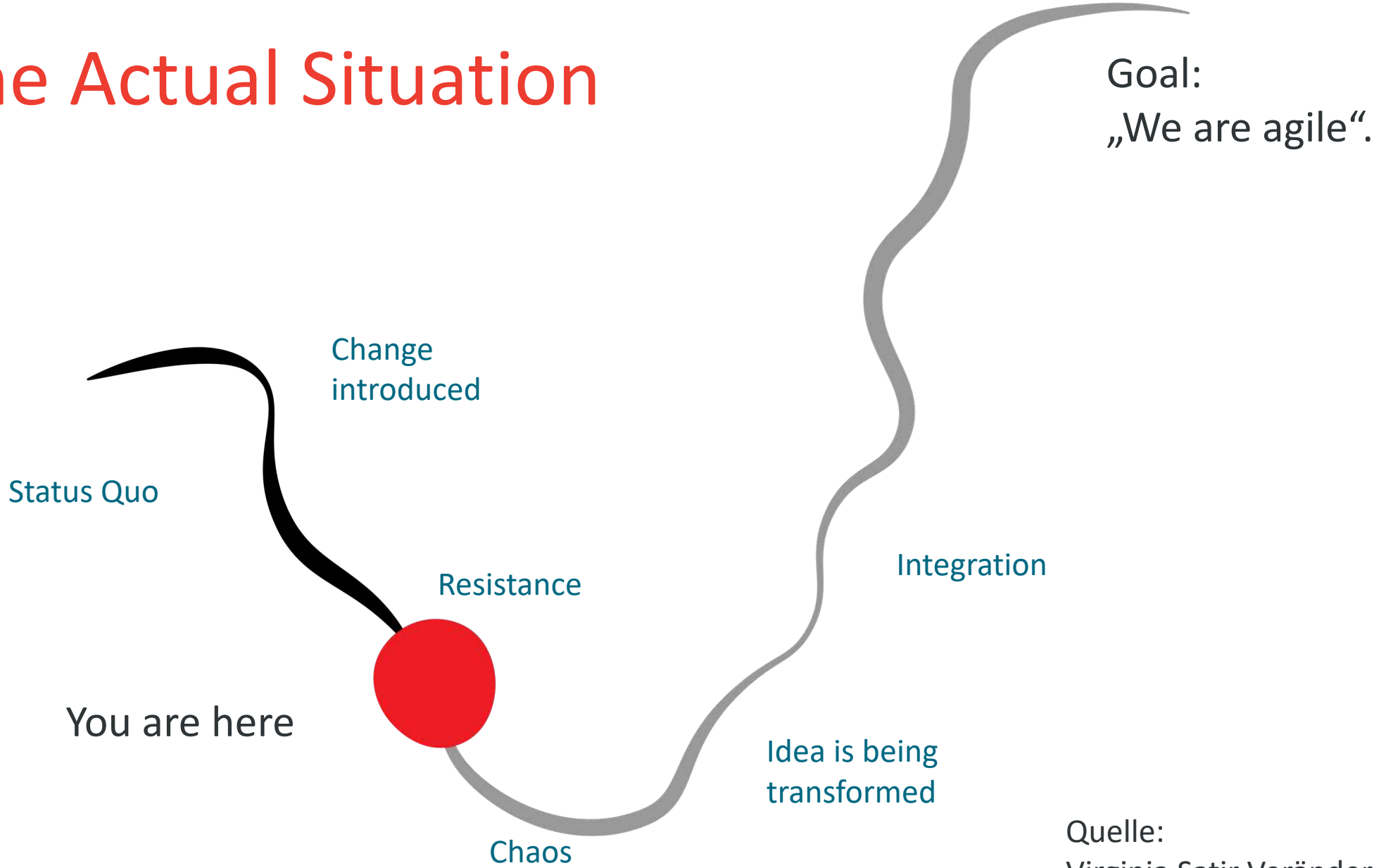
# My expectation



You are here

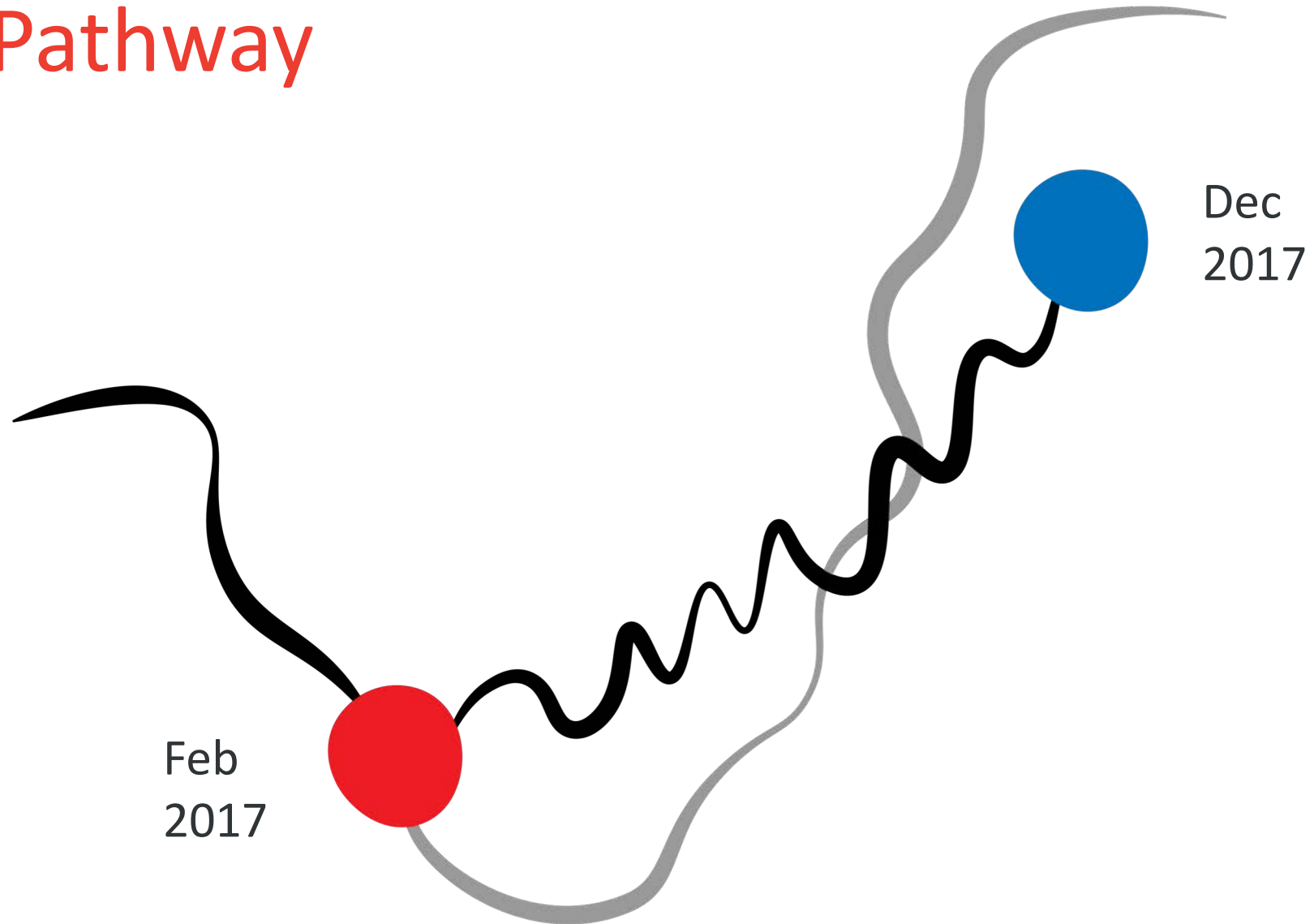


# The Actual Situation



Quelle:  
Virginia Satir Veränderungskurve

# Our Pathway



# Coaches' Response

- Reduced speed
- System design workshops split up in smaller parts
- Involvement with top management to manage expectations and communications
- Taking a step back: What is „Agility“, and what does it mean for the teams and IT Operations:
  - Self Organization, teams taking over more responsibility
  - Innovative capabilities
- Team workshops to understand and fill the roles

# Immersion Workshops



Bereit zur Umsetzung

WIP

Software paketieren (6b)

Waiting for Release

Release bauen

Integrationstest (8)

Rollout in Produktion (9)

Technische Umsetzung (5)

Kandidaten f. Umsetzung

Warten  
Spalten  
Verbinden

Manuelle Installation

- keine Projekte aus Board. Diese mit überlegen -> Anträge

Anträge - auch Fehler, Lage, Low Priorität

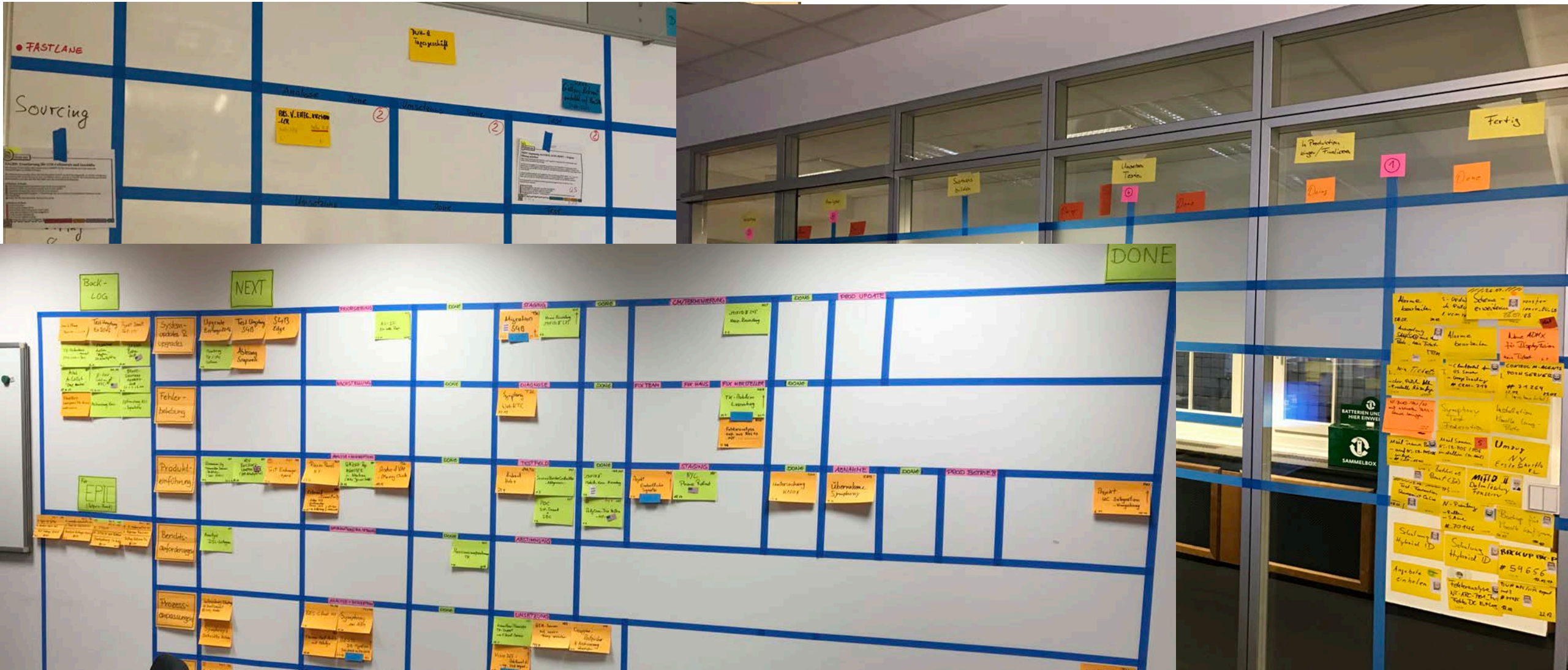
Anträge - To Do's in der...

Installation (7b)  
Release unabhängig

Release gebunden  
Installation (7a)



# One Size does NOT fit all





Kanban-Systems for Teams



Roles filled

Job  
done?











Improve processes

Office Upgrade

Regulatory stuff

Network improvements

Business Continuity

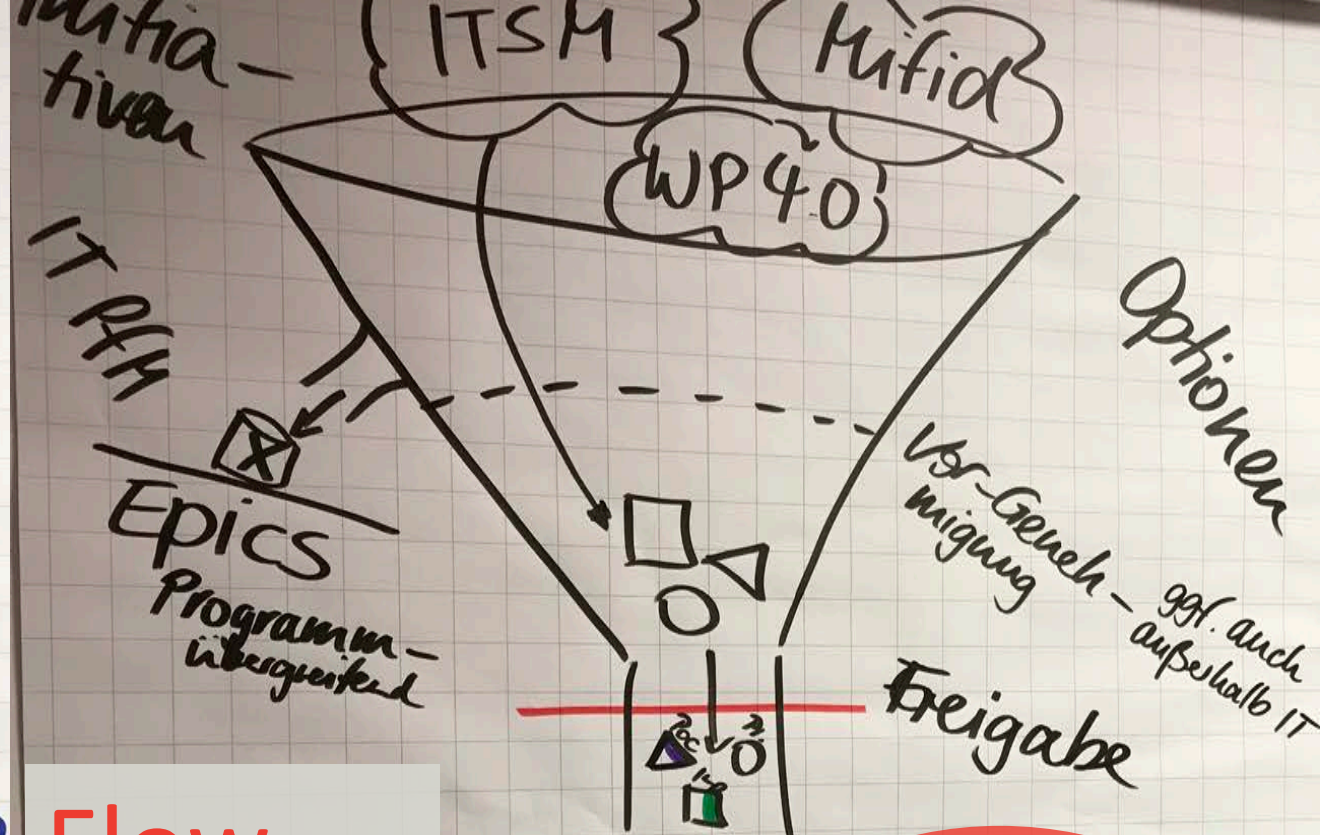
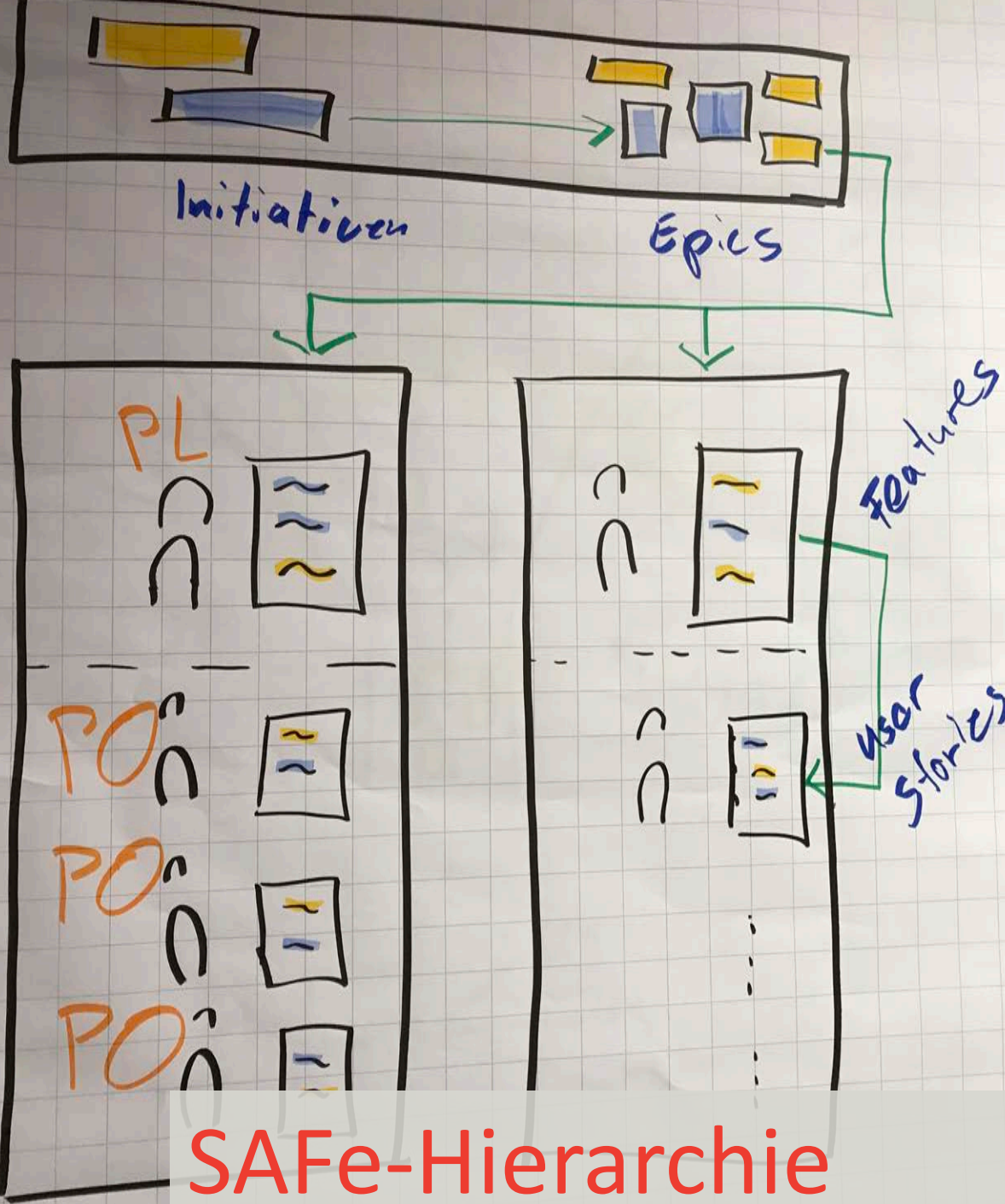
New Workplace

# Portfolio Management

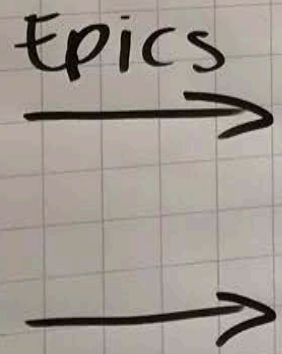
The Start

0096 ITSM-Prozesse	0096-001	Download und Vertragsverhandlungen	Gesamtaufwand: 15	x	46,5	7	880200 - Infrastructure Frontend	12,5	880300 - C
0096 ITSM-Prozesse	0096-002	0096-001 Einführung des ITSM-Tools: Testkonfiguration / Testintegration Schnittstellen ist abgeschlossen	POC Einführung des ITSM-Tools: Implementierung/Installation und Integration des ITSM-Tools		58	6	880200 - Infrastructure Frontend	12,5	880300 - C
0096 ITSM-Prozesse	0096-003	0096-002: POC Einführung des ITSM-Tools: Implementierung/Installation und Integration des ITSM-Tools ist abgeschlossen	POC Einführung des ITSM-Tools: Testkonfiguration / Testintegration Schnittstellen		25	3	880200 - Infrastructure Frontend	12,5	880200 - In
0096 ITSM-Prozesse	0096-004	0096-003: POC Einführung des ITSM-Tools: Testkonfiguration / Testintegration Schnittstellen ist abgeschlossen	POC Einführung des ITSM-Tools: Implementierung und Integration des ITSM-Tools		28	2	880300 - Client Support	26	870802 - T
0096 ITSM-Prozesse	0096-005	0096-004: POC Einführung des ITSM-Tools: Testkonfiguration / Testintegration Schnittstellen ist abgeschlossen	Gesamtaufwand: 124 Einführung ITSM-Prozesse: - Problemmanagement - Service Request Management - Incident Management und Schulungen				880300 - Client Support	124	870802 - T
0088 Einkauf	0088-001	Systemtest abgeschlossen	Gesamtaufwand: 90			0			
0088 Einkauf	0088-002	0088-001 ist erfolgreich abgeschlossen	Implementierung der Schnittstellen des Einkaufssystems		10	1	880501 - Client Server Application	10	
0088 Einkauf	0088-002	0088-001 ist erfolgreich abgeschlossen	Implementierung der Schnittstellen des Einkaufssystems		80	3	880501 - Client Server Application	15	880200 - In
0092 Lizenzmanagement	0092-001	0092-001 ist erfolgreich abgeschlossen	Gesamtaufwand: 11			0			
0092 Lizenzmanagement	0092-001	0092-001 ist erfolgreich abgeschlossen	Klärung der Schnittstellen	x	5	1	880400 - Purchasing & Administration	5	
0092 Lizenzmanagement	0092-002	0092-001 ist erfolgreich abgeschlossen	Testweise Anbindung der benötigten Schnittstellen: - A - Igel - ILMT (IBM License Metric Tool)	x	6	4	880400 - Purchasing & Administration	3	880200 - In
0092 Lizenzmanagement	0092-003	0092-002 ist erfolgreich abgeschlossen	Abnahme der benötigten Schnittstellen in Produktion: Tools		5	1	880400 - Purchasing & Administration	5	
0092 Lizenzmanagement	0092-004	0092-003 ist erfolgreich abgeschlossen	Abnahme der benötigten Schnittstellen in Produktion: Tools		6	2	880400 - Purchasing & Administration	3	880200 - In
0092 Lizenzmanagement	0092-005	0092-004 ist erfolgreich abgeschlossen	Anbindung der benötigten Schnittstellen in Produktion: - A - Igel		9	4	880400 - Purchasing & Administration	3	880203 - In

Step 2: 77 lines Excel

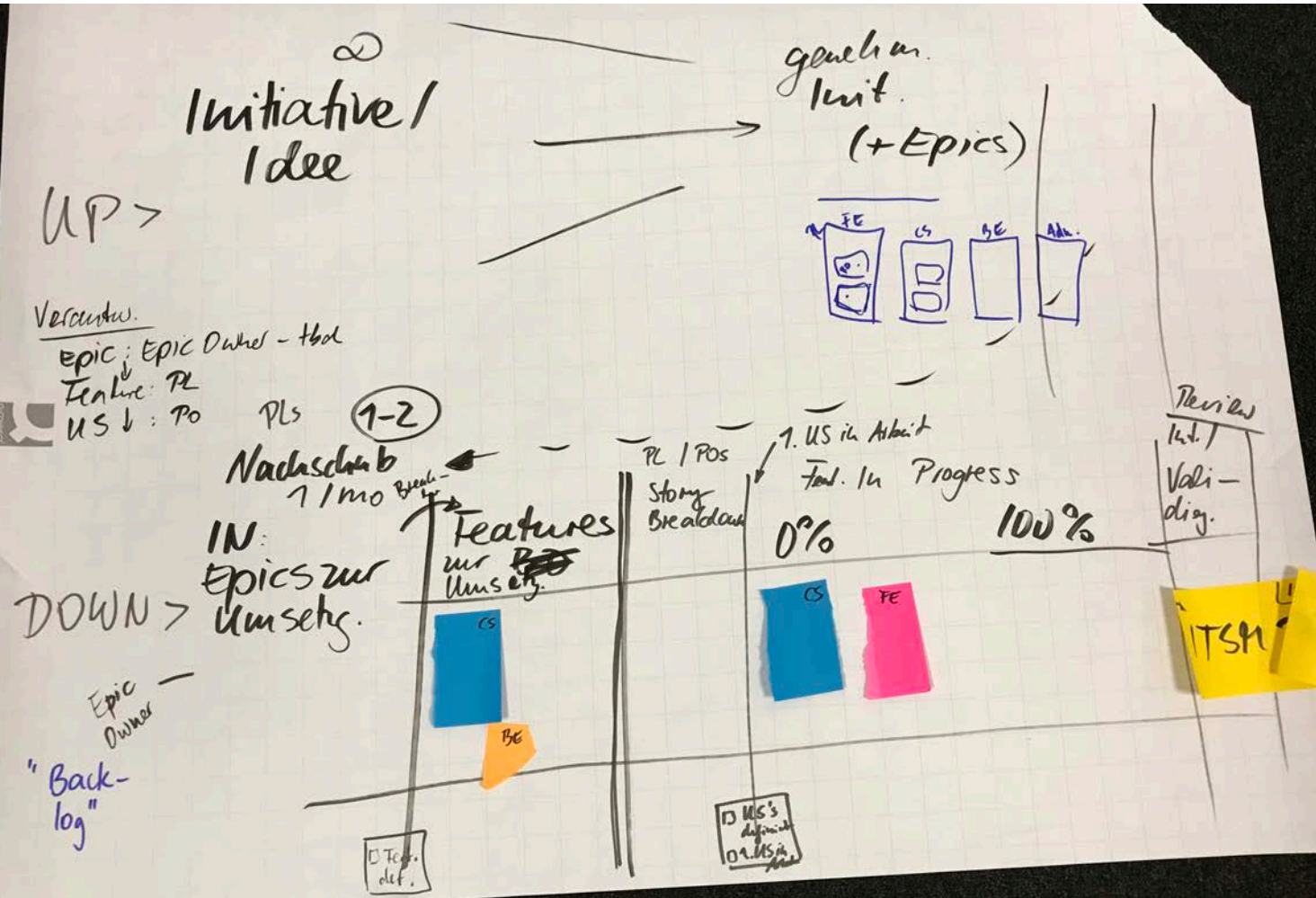


Flow



us  
us  
Preparation  
June 27

# Board Iteration #1



July 10

Features in Arbeit

Feature / User Stories umgesetzt und vom PO reviewed

Epic wurde dem Epic Owner vorgestellt und als "fertig" akzeptiert

Done - Wertvolles geliefert!

Review



Feature wird im Programm implementiert

Story Breakdown

Wie Story werden und Story / PO diskutiert

Features zur Umsetzung

Epics zur Umsetzung

Werkzeuge und Frameworks

Handwritten notes on yellow sticky paper

Handwritten notes on yellow sticky paper

Handwritten notes on yellow sticky paper

Handwritten notes on yellow sticky paper

Handwritten notes on yellow sticky paper

Handwritten notes on yellow sticky paper

Handwritten notes on yellow sticky paper

Handwritten notes on yellow sticky paper

Handwritten notes on yellow sticky paper

Handwritten notes on yellow sticky paper

Handwritten notes on yellow sticky paper

TSM-AC Vorbereitung Vortrag

Handwritten notes on yellow sticky paper



July 10



Color coding for programmes

- Legende Programme
- Infrastructure Frontend
- Client Services
- Purchasing & Administration
- Infrastructure Backend

BIA = Business Impact Analysis

Epics: ...

Als nächstes (in Initiative)

Nachschubmeeting  
DTN  
Verfügbare Slots werden angelehrt. Seminareklassen u. ...

Epics zur Umsetzung

Features zur Umsetzung

# IT Operations Portfolio

Features in Arbeit

Story Breakdown

0%

100%

Review

Done - Wertvolles geliefert!

Features get started

July 25

1 Patch Mgt 30.9.2009  
Epic: Emergency  
Owner: ...  
Features: ...

1 ITSM Prozess  
Epic: ...  
Owner: ...  
Features: ...

1 Patch Mgt 30.9.2009  
Epic: ...  
Owner: ...  
Features: ...

1 BSM  
Epic: Business Impact  
Owner: ...  
Features: ...

1 ITSM WP-30  
Epic: Reaction & Recovery  
Owner: ...  
Features: ...

1 Lizenz-Management  
Epic: ...  
Owner: ...  
Features: ...

1 Client Services  
Epic: ...  
Owner: ...  
Features: ...

1 Kundenbetreuung  
Epic: ...  
Owner: ...  
Features: ...

Epics ...

Management  
Abkürzung Prozess  
Owner: ...

Management  
Abkürzung Prozess  
Owner: ...

Management  
Abkürzung Prozess  
Owner: ...

Management  
Schulungsbedarf, Drucke & Vorl. & ...  
Owner: ...

Management  
Dokumentation & Schulungsaktivität  
Owner: ...

Management  
Technische Bereitstellung, HLW  
Owner: ...

ITSM-Proz  
Kontinuelle Verbesserung  
WNA: XCS

ITSM-Proz  
Kontinuelle Verbesserung  
WNA: XCom

Standard Patch  
Patch Mgt Tool  
WNA: XCS

Standard Patch  
Windows-Systrace  
WNA: XCom

ITSM  
FAX (SAP auf TFS)  
Owner: ...

ITSM  
Client Services (SAP) und (SAP)  
WNA: XCom

Emergency Patch  
Windows-Systrace  
WNA: XCom

ITSM-Proz  
Kontinuelle Verbesserung  
WNA: XCS

ITSM-Proz  
Kontinuelle Verbesserung  
WNA: XCom





EPIC: JS2  
BVA TES Analyse  
Finanz-Administration  
Owner: [redacted] 7

I: Cl [redacted]  
Epic: Validierung des  
Betriebsmodus  
JS5 TC2  
BVA  
DE3  
Owner: [redacted] 12

I: Cl [redacted]  
Epic: P [redacted]  
AD  
JS2  
BVA  
DE3  
Owner: [redacted] 9,5

I: Cl [redacted]  
Epic: (App)  
JS2 TC2  
BVA  
DE3  
Owner: [redacted] 3

I: Chat Solution |  
Epic: IC  
Ch  
JS3  
BVA  
DE3  
Owner: [redacted] 3

I: ORC |  
EPIC: B  
Konzepte  
JS 13 DE3  
BVA TC5  
Owner: [redacted] 9,8

I: Cl [redacted]  
Epic: User Genehmigungs-  
Workflow  
(R.O.M)  
JS7  
BVA DE3  
Owner: [redacted] 3

I: Cl [redacted] Symphony  
Epic: M  
JS8  
BVA (Screening + VC)  
DE3  
TC2  
Owner: [redacted] 0,8

I: [redacted]  
Epic: [redacted] Logie  
D  
Owner: [redacted]  
JS5  
BVA  
DE9  
2,4

I: Chat Solution |  
Epic: A Jiva  
an Symphony  
JS3 DE3  
BVA DE  
Owner: [redacted] 1,7

Einkauf [redacted]  
Epic: [redacted]  
Owner: [redacted]  
JS8  
BVA  
DE4  
TC5  
7,5

I: Einkauf [redacted]  
Epic: T [redacted]  
Owner: [redacted]  
JS2 DE3  
BVA TC  
Technische Prüfung  
DECS app DE3 DE8

# Postponed Projects



Als nächstes  
(in Initiative)

Nachschubmachung  
D. TI  
e. Verfügbare Stoffe unter  
Aufsicht  
Sachklassen u.  
Dauer

Epics zur  
Umsetzung

Features zur  
Umsetzung

Story  
Breakdown

Features  
in Arbeit

0%

100%

Review

Done - Wert-  
volles geliefert!



Feedback  
bitte :)

A large Kanban board with multiple lanes. The lanes are labeled at the top: 'Epics zur Umsetzung', 'Features zur Umsetzung', 'Story Breakdown', 'Features in Arbeit', 'Review', and 'Done - Wertvolles geliefert!'. The board is filled with numerous sticky notes, each containing text such as 'Epic: ...', 'Story: ...', 'Task: ...', and progress indicators like 'Done', 'In Progress', and 'To Do'. Some notes include dates and specific task names like 'TK-Anlage', 'LWL Change', and 'Standard Patch'. The board is organized into columns representing different stages of the project lifecycle.





Epics zur Umsetzung

Features zur Umsetzung

Story Breakdown

Features in Arbeit

Review

Done - Wertvolles geliefert!

System alive and kickin'  
Work moving slowly.

Nov 1

Epics zur Umsetzung  
Epic: [unclear]  
Owner: [unclear]

WP: 30.12.2017  
Epic: [unclear]  
Owner: [unclear]

31.10.2017  
Epic: [unclear]  
Owner: [unclear]

Epic: [unclear]  
Owner: [unclear]

Epic: [unclear]  
Owner: [unclear]

Features in Arbeit  
Epic: [unclear]  
Owner: [unclear]

Review  
Epic: [unclear]  
Owner: [unclear]

Done - Wertvolles geliefert!  
Epic: [unclear]  
Owner: [unclear]

Epics zur Umsetzung  
Epic: [unclear]  
Owner: [unclear]

Epics zur Umsetzung  
Epic: [unclear]  
Owner: [unclear]

Epics zur Umsetzung  
Epic: [unclear]  
Owner: [unclear]

Epics zur Umsetzung  
Epic: [unclear]  
Owner: [unclear]

Epics zur Umsetzung  
Epic: [unclear]  
Owner: [unclear]

Epics zur Umsetzung  
Epic: [unclear]  
Owner: [unclear]

Epics zur Umsetzung  
Epic: [unclear]  
Owner: [unclear]

Epics zur Umsetzung  
Epic: [unclear]  
Owner: [unclear]

Epics zur Umsetzung  
Epic: [unclear]  
Owner: [unclear]

Epics zur Umsetzung  
Epic: [unclear]  
Owner: [unclear]

Epics zur Umsetzung  
Epic: [unclear]  
Owner: [unclear]

Epics zur Umsetzung  
Epic: [unclear]  
Owner: [unclear]

Epics zur Umsetzung  
Epic: [unclear]  
Owner: [unclear]

Epics zur Umsetzung  
Epic: [unclear]  
Owner: [unclear]

Epics zur Umsetzung  
Epic: [unclear]  
Owner: [unclear]

Epics zur Umsetzung  
Epic: [unclear]  
Owner: [unclear]

Epics zur Umsetzung  
Epic: [unclear]  
Owner: [unclear]

Epics zur Umsetzung  
Epic: [unclear]  
Owner: [unclear]

# It's all about communication



Created visibility and alignment  
between programs  
Joint selection / priority decisions



Kanban-Systems for Teams

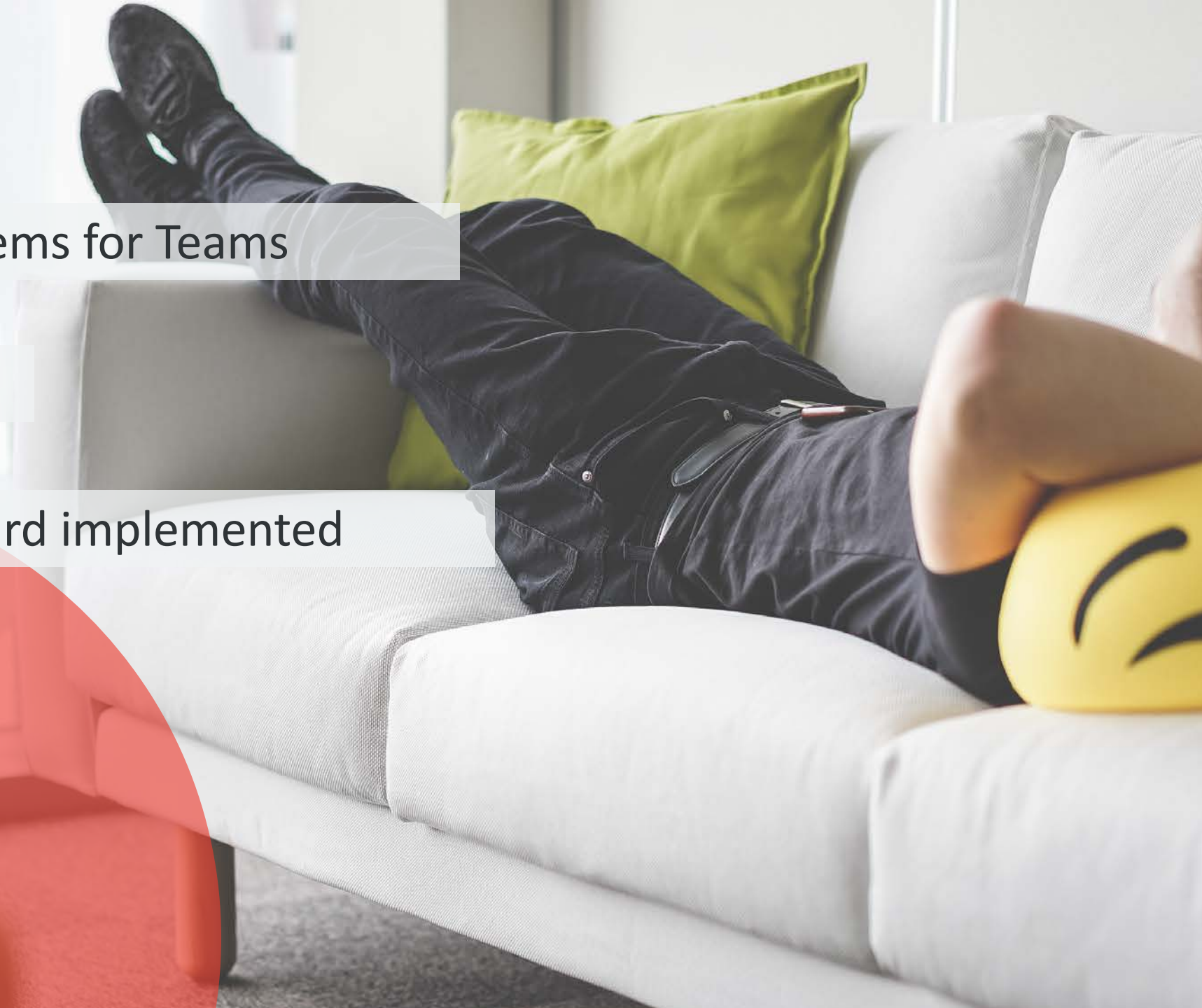


Roles filled



Portfolio Board implemented

Job  
done?





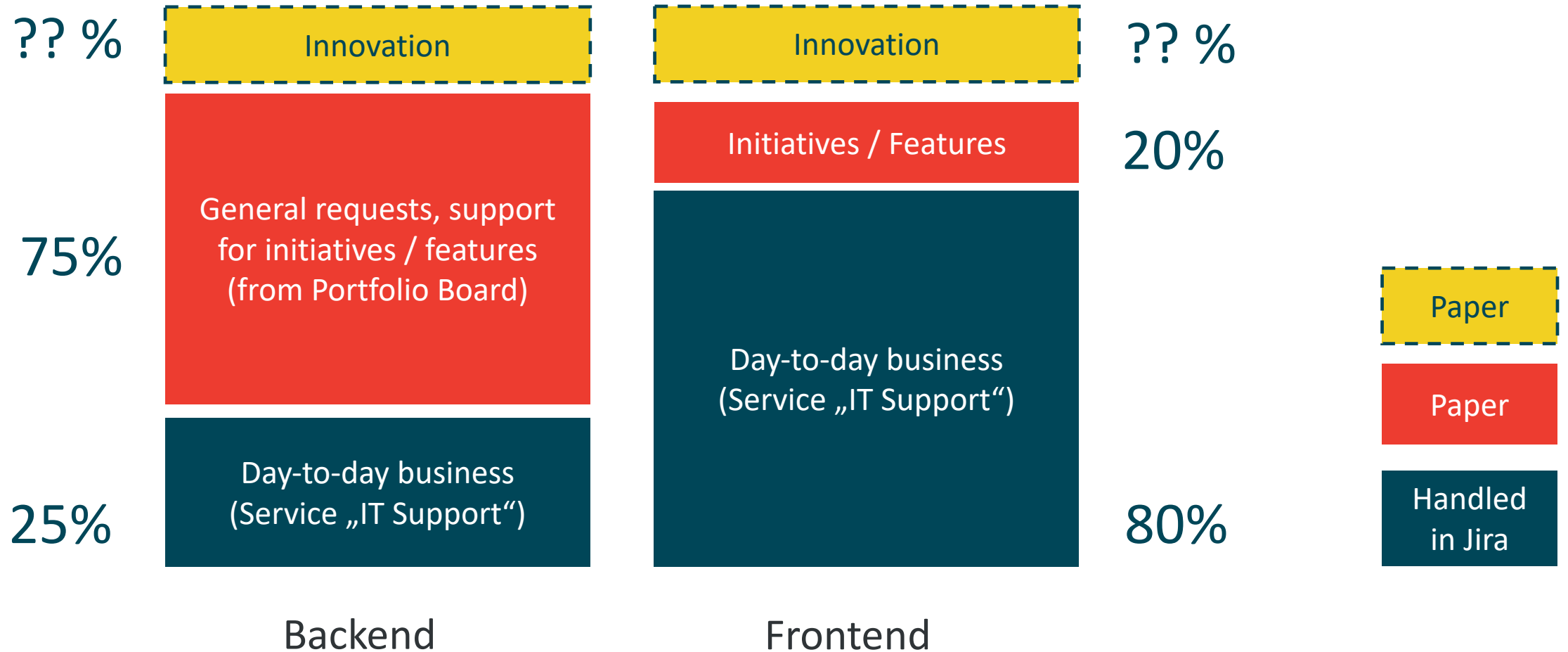
# Status at the End of 2017

- Healthy mix of Pull systems and Proto-Kanban systems in the teams
- Kanban systems largely self-sustaining (1/2 Coach for all teams)
- Proto-Kanban-ish Portfolio Board (more than a status board but no Pull yet)
- Stronger Service-Orientation (eg cross-team boards)

# Observed Effects

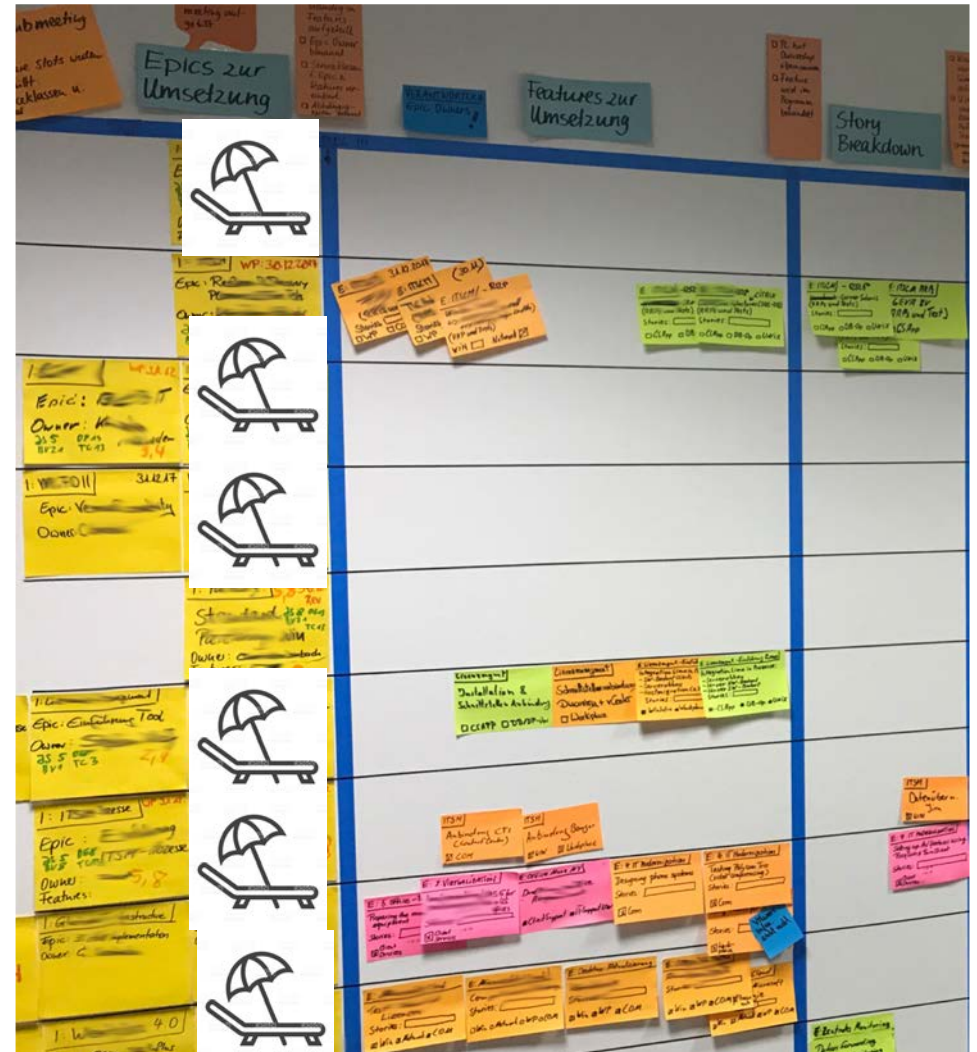
- Transparency, transparency, transparency
- More empathy across teams and between teams and management
- Trust is (being) rebuilt
- A richer language to express frustrations and issues
- Insights about actual capabilities of the organization

# Allocation of Capacities



# ....and Towels on Deckchairs!

- Observed effect of never-ending epics
- Once they had “their” lane, they grew more and more features!
- Insight: Board design not tuned to manage bottleneck (delivery capacity in the teams) -> no Pull from teams





# Further Learnings in the Organization

- Initial Systems were based 1:1 on team structure
- Teams with technological focus, but Services often spanning multiple teams.
- This complicates Service Delivery through dependencies that need to be managed
- Informs ideas for evolving organization
- „Laggard“ Program adjusted approach: Initial design based on services delivered, having people self-organize around it

# Evaluation at the end of 2017

”

We know our journey has just begun.



Use  
metrics

Implement  
more  
feedback loops

Get to Pull  
on Portfolio level





Reflections

”

This is my personal view on SAFe and Kanban.

Please don't sue me.

# SAFe and Kanban

SYMBIOSIS?

A close-up photograph of a bumblebee with black and yellow stripes, perched on the bright red, spiky center of a flower. The background is a soft, out-of-focus pink and purple, suggesting other flowers in the same field.

# Kanban scales. Without SAFe.



Kanban helps to implement the different SAFe hierarchies.





Peaceful coexistence



SAFE

Change  
towards  
defined  
configu-  
ration

Approach  
to Change

Kanban

Start  
where you  
are!  
+  
Evolution

# Reflections as a Coach







Enforced new  
roles in teams

SAFe  
hierarchy  
overinflated

New team structures  
and leads

“Kanban  
is not  
for us”

Be like  
water

# Learnt

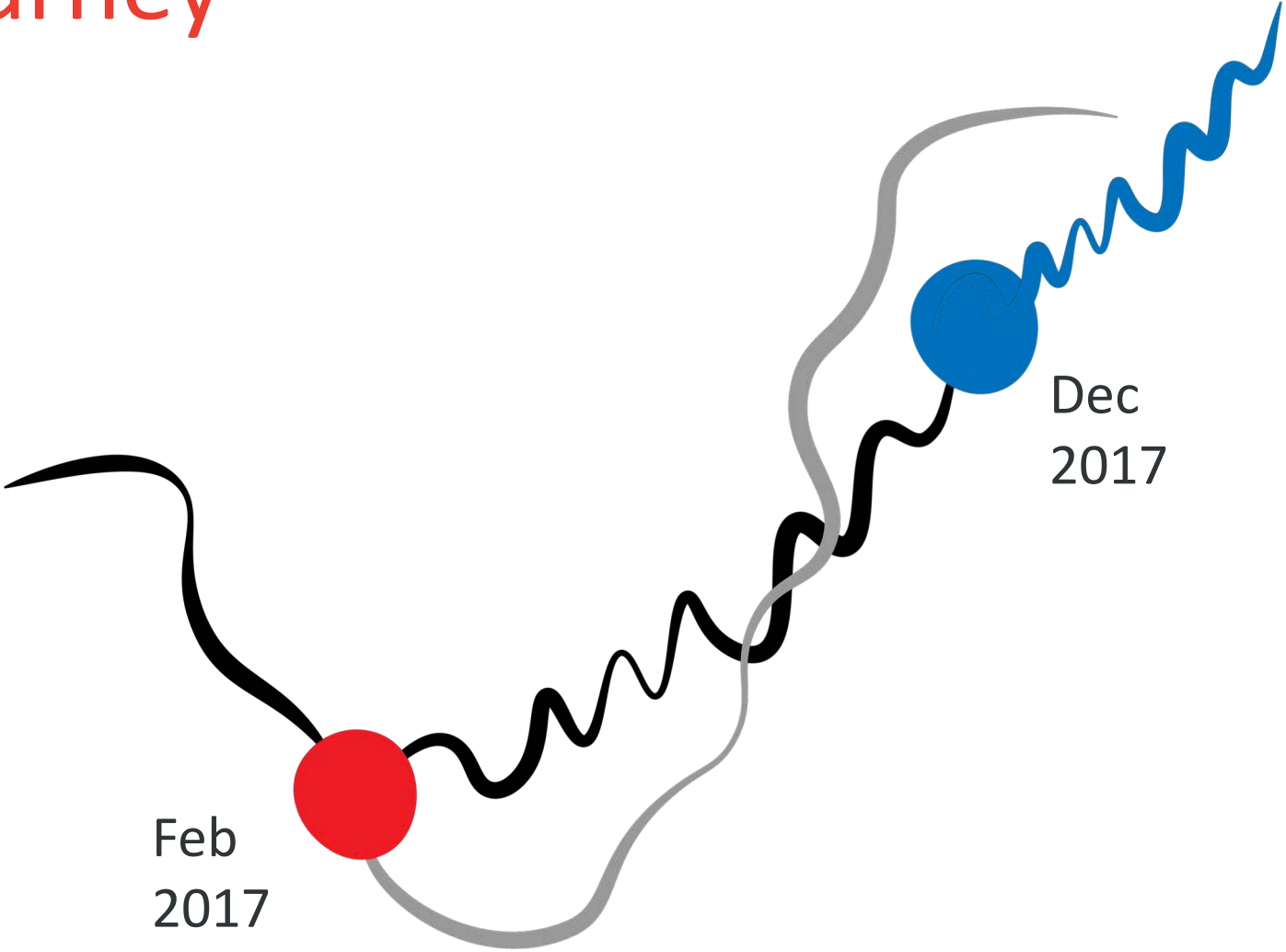
- Ask (even) more questions!
- Mapping Kanban Systems 1:1 to team level will cement team structure
- If you can, start thinking and visualizing on a Services level early on!
- Evolution in the middle of a revolution is a noble but exhausting mission.
- Building up solid Kanban knowledge in the organization early helps getting self-sustaining systems quickly.

Evolutionary change takes time

**MIND THE GAP**

...but not necessarily more coaching

# The Journey





# Let's rewind to the start once more!



---

2016

2017

2018

# Alternative Beginning

- It is the end of 2016 again!
- Instead of copying the SAFe blueprint from Development to Operations:
  - „Let’s kanbanize our IT Operations Services“!
- Do it team by team, starting with the ones showing the most interest and/or dissatisfaction with the Status Quo
- Gradually adjust team structures and roles, based on the actual needs and insights gained
- Let service delivery improve and service orientation grow

”

And they'd happily pursue  
evolutionary change ever  
after 😊





Susanne Bartel  
susanne@flow.hamburg

Twitter: @SusanneBartel,  
@FlowHamburg

Infos, Termine:  
[www.flow.hamburg](http://www.flow.hamburg)

**Thank you!**  
**Vielen Dank!**

A large, stylized red graphic element on the right side of the slide, resembling a thick, curved arrow or a stylized letter 'F' pointing downwards and to the right. It has a white outline and a textured, slightly distressed appearance.

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PLAN SYSTEMS. MANAGE WORK. LEAD PEOPLE.