SUPERCHARGE YOUR SAFE IMPLEMENTATION WITH OBEYA

A game-changer in executing strategy together

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SUMMARY

In the complex and rapidly changing landscape of modern organisations, effective execution of strategy is essential to gaining competitive advantage and achieving business objectives.

The Scaled Agile Framework (SAFe) is a framework for improving alignment, collaboration, flow optimisation and value creation within large and complex projects and programmes .

Obeya (meaning 'big room' in Japanese) is a visual management tool that supports a team in achieving its goal through visualisation and continuous improvement.

Leading with Obeya (LWO) is a practical management method that deploys Obeya to help leadership teams bring strategy to execution.

In exploring the aspects of the Scaled Agile Framework (SAFe) and the Leading with Obeya (LWO) method, we see a foundation that can reinforce each other well

In summary, we see the specific added value of LWO within SAFe in the following areas:

1. **Transparency, overview and insight**: Visualising and governing the entire system : Besides the SAFe focus on value creation via epics, features and stories, LWO makes other crucial activities such as HR, training and finance visible and governable.
2. **Connection**: connecting SAFe applications to the rest of the organisation (cascading & connecting). LWO promotes transparency in progress, challenges and achievements from the ART to Portfolio level and the entire organisation, leading to improved alignment and collaboration at all levels.
3. **Better decision-making**: visualising the linkage between epics and features to strategic themes, Key Performance Indicators (KPIs) and Objectives & Key Results (OKRs) allows for better informed decision-making.
4. **Improvement capability**: LWO has a higher frequency and on multiple fronts deployment of continuous improvement in its routines and the visualisations. This achieves a better flow of implementation of improvement compared to Inspect & Adapt, as implemented within SAFe.
5. **Responsiveness:** LWO has a more frequent and more effective rhythm of Obeya sessions compared to SAFe events which facilitates alignment and responsiveness to strategic themes, KPIs, OKRs and ongoing initiatives. Moreover, synchronisation between teams is intensified and rhythm and routine are optimised. At the same time, ad hoc meeting time and e-mails are reduced and other scheduled meetings are integrated or redundant.

We explore these areas using the Aegon case study where LWO and SAFe are deployed in an integrated way, naming several advantages.

In summary, integrating LWO within and around a SAFe implementation enables teams to execute strategy more effectively by fostering shared insight, learning and action. In doing so, you supercharge the SAFe implementation and form a gamechanger in the realisation of your strategy!

At the end of this article, the reader will be handed four steps to get started and practical tips and tools to take steps themselves in their own environment with the combination of the SAFe framework and the LWO method.

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INTRODUCTION

As professionals, we are constantly looking for better ways of working. In this article, the authors talk about their positive experiences combining the Scaled Agile Framework (SAFe) and Leading with Obeya (LWO), which complement and reinforce each other when it comes to bringing strategy to execution.

Many organisations are implementing Agile practices to respond appropriately to rapid change. The Scaled Agile Framework (SAFe) provides a structured approach for scaling up Agile methodologies within organisations, achieving focus on value creation and ensuring team alignment. SAFe acts as a collaborative model that supports multiple teams in delivering valuable products and services to customers

Obeya, Japanese for "Big Room", is a visual management tool, which originated at Toyota in the mid-1990s for the development of the Prius. With an Obeya, teams visualise all relevant information and learn and improve together to achieve their goals reach . Obeya focuses on collaboration, creating visual overview and enhancing problem-solving skills. With this, Obeya can be used for a variety of purposes, with the shape and mode of operation in the big room adapting to the purpose it is used for.

The Leading with Obeya (LWO) management method has a very specific way of using Obeya for strategy execution. It promotes transparency and collaboration by visually linking long-term goals to short-term actions. LWO provides concrete practices, templates and meeting routines for a leadership team. When used with multiple leadership teams, the method can provide a scalable leadership system, bringing strategic connection to all levels of an organisation in a practical way

We write this article with the aim of introducing people with a SAFe background to the benefits of working within an Agile Release Train (ART) combined with Leading with Obeya (LWO). This is to 'supercharge' the impact of their SAFe implementations and strengthen the realisation of strategy.

We will delve deeper into the benefits of combining and integrating SAFe and LWO, starting with a brief explanation of both SAFe and the visual management tool Obeya and the LWO method in Part I. In Part II, we draw on practical experiences at Aegon, where LWO has been applied within multiple ART s since January 2023. We then give readers tools to take steps themselves in Part III and conclude with the conclusion.

PART I: CONTEXT AND BACKGROUND

What is SAFe?

The Scaled Agile Framework, or SAFe, is a comprehensive framework that enables organisations to implement Agile principles at scale. The primary objective of SAFe is to improve alignment, collaboration, flow optimisation and value creation within large and complex projects and programmes. The framework integrates elements from Agile software development, Lean product development, DevOps and systems thinking. SAFe thus provides a structured approach to developing, delivering and managing complex products and services, involving multiple Agile teams.
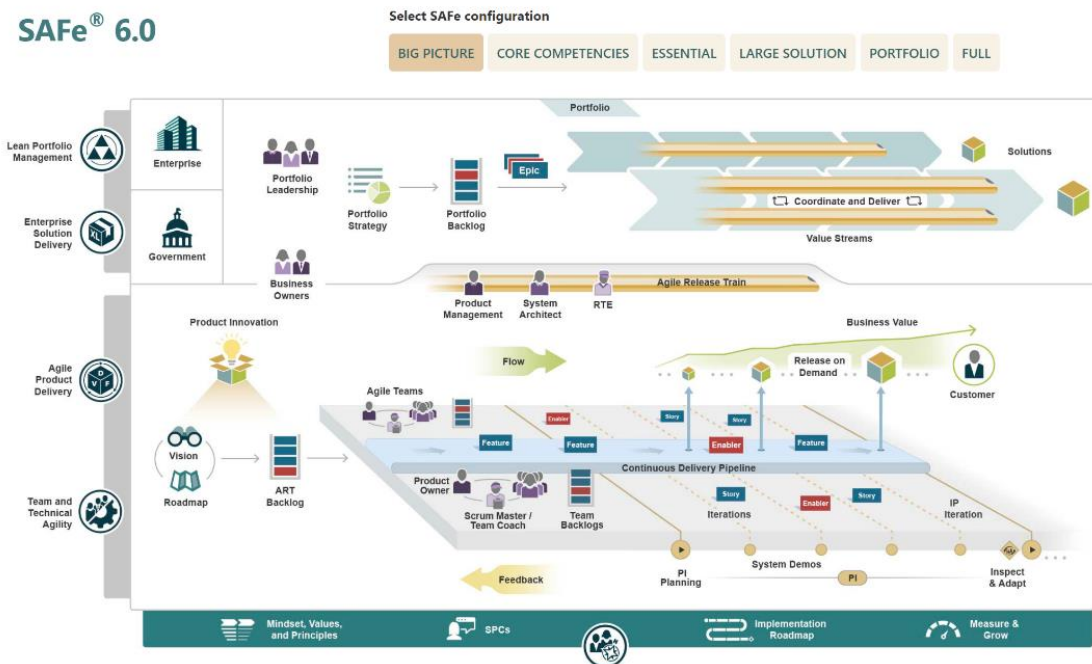
The strength of SAFe lies in its layered structure with the Agile Release Train (ART) as the starting point. Thus, the framework creates an environment in which teams can operate as one and these teams deliver new functionality together - in a predictable rhythm. What makes SAFe effective is the way it supports collaboration between teams. Through mutual coordination and alignment, even the most complex projects can be realised step by step. Special events thereby ensure a natural flow in communication and interaction between all involved. SAFe also offers the ability to scale up to a structure where multiple ARTs deliver value collectively, known as Large SAFe.

In addition, a Portfolio layer can be used for overarching operational and strategic alignment. This layer supports in prioritising initiatives and allocating resources across the organisation, with the aim of maximising value and aligning business objectives. This allows both individual teams and multiple ARTs to contribute effectively to the organisation's long-term vision and goals.

This article assumes the reader is familiar with SAFe. For more detailed information on SAFe, including how it works, roles and events, please visit www.scaledagileframework.com.

What is Obeya and Leading with Obeya?

Obeya is a visual management tool that originated with Toyota and literally means 'Big room' in Japanese. Toyota achieved considerable success with Obeya, particularly in the development of the

Prius in the mid-1990s. This innovative car was not only developed in record time, but also set new standards for fuel efficiency and became the world's most successful hybrid car .

Organisations seeking to implement Obeya at the leadership level find that replicating Toyota's success is challenging, mainly because they lack the decades of expertise Toyota has built up in visual management and continuous improvement. To bridge this gap, Tim Wiegel developed a practical management method using a specific form of Obeya and described it in his book 'Leading with Obeya'. This method integrates the principles of Obeya, but focuses specifically on strategy execution. This involves both run and change activities of an organisation and managing them in the context of the organisation's strategic objectives.

A frequent challenge in strategic implementation is the lack of tangibility and clarity for teams within the organisation. In addition, management teams often lack a concrete and unified way of working. These factors can significantly hinder the effective translation from strategy to implementation.

The Leading with Obeya (LWO) method addresses these challenges by providing management teams with a visual approach that concretises strategy at every level of the organisation. The method includes a practical set of management principles, structured meeting routines, and visual templates and tools. The book describing the method acts as a comprehensive manual, practically explaining all aspects of the method.

By teams in the context of LWO, we mean leadership teams, i.e. teams that have to give direction to work to be executed. These can be teams working within the SAFe framework, or teams working outside the SAFe framework such as the MT of a business unit or board. Ultimately, LWO is about the team working together in the Obeya to govern their part of the organisation.

Whereas the concreteness of Agile working methods such as Scrum and Kanban used to focus mainly on teams building valuable products, LWO also offers a practical and visual method at management level to guide the implementation of organisation's strategy in a Lean and Agile way.

How does the LWO method work and what are its benefits?

The LWO method is based on five fundamental leadership tasks which are essentially performed by every MT with or without Obeya. These five leadership tasks are:

- Strategic direction: Defining organisational goals based on the strategy and defining the required capabilities. This includes all aspects required for success on the strategic goals.
- Performance: Measuring and evaluating progress towards set strategic goals, e.g. with KPIs and OKRs.
- Tough problems: identifying and addressing critical challenges that help improve performance. High-frequency, structured problem solving is central here.
- Plan to value: The plan to value forms the roadmap for what the team thinks needs to happen in order to achieve the strategic goals. This takes shape, for example, through planning in time or through kanban.
- Act & Respond: Managing contingencies such as problems or requests during the implementation of the plan.

The five tasks and their relationship with SAFe are further detailed in the next chapter.

The essence of the MT's work remains unchanged; only the way the work is done is different. The leadership team meets regularly in the Obeya to carry out the leadership tasks mentioned above with each other. In a LWO environment, the five leadership tasks are visually represented in sections on a (physical or virtual) wall. Each board has its own meeting rhythm where the team focuses on that part of the Obeya. This makes the way the team works more transparent, meetings become more effective and take place in the Obeya, keeping strategy and execution continuously connected. This makes the method particularly versatile and adaptable and suitable for directing and driving both operational execution and organisational change in the context of the organisation's strategic goals.

Management teams implementing the LWO method say they experience several practical benefits :[1]

- Increased meeting efficiency: By promoting focus and productivity, resulting in time savings.
- Improved cooperation: reducing silo thinking and encouraging interdepartmental cooperation.
- Increased transparency: Providing clear insight into targets and performance through effective development and monitoring of KPIs and milestones.
- Optimised decision-making: through structured meeting routines and thorough information analysis.
- Clarification of responsibilities: By assigning specific ownership over strategic components.

The method is designed to integrate seamlessly with other management models and ways of working such as SAFe, OKRs, OGSM and Balanced Scorecards. The wide applicability of LWO is underlined by the translation of the book into five languages and its successful implementation in various organisations, ranging from startups to multinationals, in different sectors worldwide

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[1] Obeya after 6 months of research - Leading with Obeya, 2023

In what areas can you combine SAFe and LWO ?

The synergy between the SAFe and LWO is based on their shared focus on transparency, collaboration (systems thinking) and continuous improvement. This combination strengthens the effectiveness of decision-making and organisational alignment.

These are the primary areas where SAFe and LWO complement or in synergy:

Visual

LWO strengthens SAFe by visualising strategic objectives, progress indicators and challenges. This increased visibility promotes transparency and alignment crucial within organisations adopting SAFe for their product development.

Structure and

LWO's Obeya sessions partly overlap with SAFe sessions. Consider recurring events within SAFe, such as Portfolio Sync, PI Planning, Scrum of Scrums and ART Sync. The activities from these events are integrated into the LWO rhythm & routine. This reduces the total meeting time without losing scope. It also increases responsiveness to change and improvements in certain aspects. This integration promotes consistency and effectiveness in communication and coordination.

Application of Lean & Agile

Both methodologies are rooted in core principles from the Lean & Agile world such as systems thinking, continuous improvement, customer value orientation and respect for people. LWO provides a framework to visualise these principles and structurally embed them in the team's way of working.

Scop

Whereas SAFe is primarily focused on developing, delivering and managing complex products and services, LWO provides a management platform for governing the entire operations and business strategy (run & change), incorporating, for example, HR, marketing and other capabilities that holistically enable the organisation to achieve its strategic goals

By adopting LWO among leadership teams that fall outside the scope of the SAFe implementation, such as business unit MTs or senior management, organisational agility can be increased. This is an opportunity for players within a SAFe implementation to also connect with their normally non-Agile-oriented stakeholders. Simply by aligning strategy in the Obeya, by more easily aligning meetings and a shared performance overview and plan by value for the portfolio. This then results in improved alignment with business objectives throughout the organisation and an optimised cadence between business and IT teams.

This integrated approach enables organisations to leverage the benefits of both methodologies, resulting in increased transparency, improved decision-making and more coherent execution of strategic initiatives. It facilitates an organisational culture that is both agile and strategically oriented, optimising overall organisational performance.

In terms of scalability, LWO and SAFe can easily grow with each other, for example by expanding the number of ARTs within SAFe. Because LWO is based on visualisation, working and thinking patterns around a team, these patterns can be set up identically in terms of form for the next team and thus easily linked, or 'cascaded and connected'. Thus, simply by following the method at the content and

process level, linkage is made between the executive team, portfolio leadership or an ART within an organisation. The forms and practices for each of these teams are the same, but the content varies in scope and level of detail.

Connecting to SAFe Portfolio

Below is an example showing how different ARTs are connected at Portfolio level through LWO.
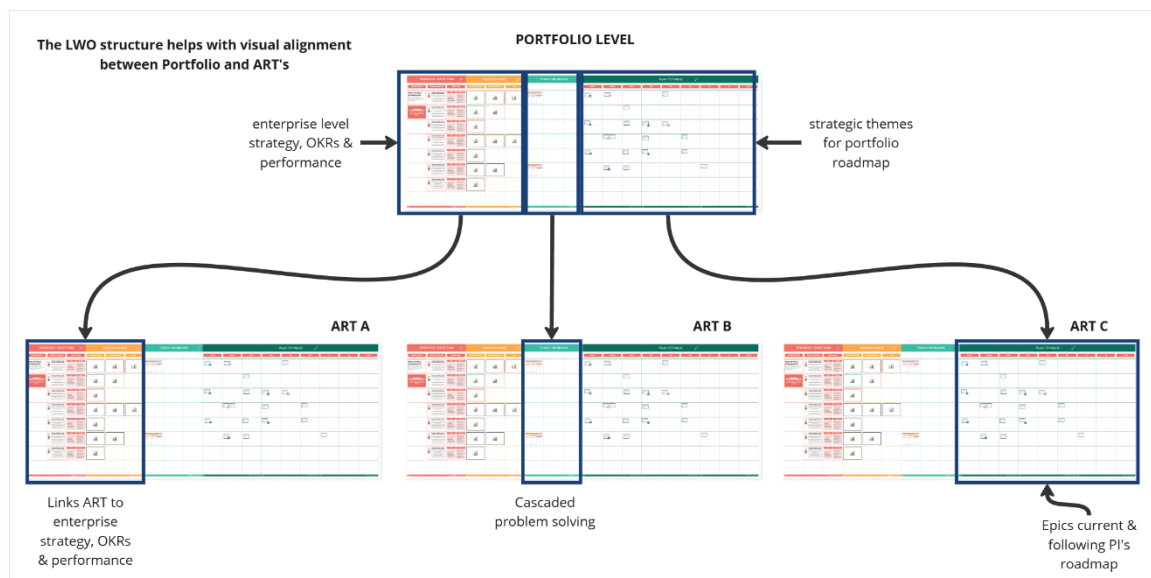
As indicated earlier, a portfolio level can be added above ARTs for overarching operational and strategic alignment. With cascading and connecting to LWO, the ARTs' strategy, metrics and work to be done (PI Roadmap) can be linked to the Enterprise roadmap on portfolio.

LWO can be combined with SAFe at ART and portfolio level.

Below, we provide the description for each of the leadership tasks and associated signs what the added value of LWO is at SAFe portfolio and ART level.

LWO part	Description	Added value for SAFe portfolio level	Added value for SAFe ART level
Strategic direction	Defining organisational goals based on strategy and defining required capabilities. This includes all aspects required for success on the strategic goals.	This section provides the strategic framework for defining the portfolio strategy and prioritising the portfolio backlog. This will create a roadmap at the (portfolio) epic level.	An ART will basically take the structure of the portfolio (backlog and roadmap) and work it out in more detail for its own context. This provides the basis for its own specific vision and product roadmap.
Performance	Measuring and evaluating progress	At portfolio level, this gives tools to monitor	Again, an ART will have worked out the

	towards set strategic goals, e.g. with KPIs and OKRs.	the effectiveness of the portfolio, both on performance of the value streams and also the intended business outcome. This helps prioritise the portfolio backlog. LWO explicitly adds data-driven governance at portfolio level.	performance (incl. measure & grow) in more detail for their own performance and the specific business outcomes the ART wants to achieve. Again, this information plus the higher frequency of discussing it helps in making decisions and prioritising the ART backlog.
Tough problems	Identifying and addressing critical challenges that help improve performance. High-frequency, structured problem solving is central here.	At portfolio level, it addresses the difficult problems that impact and need to be solved at enterprise level. LWO adds identification and structured resolution of difficult problems here.	At ART level, difficult problems are addressed that occur at ART level (possibly in connection with portfolio level). LWO adds identification and structured resolution of difficult problems here.
Plan to value	The plan by value forms the roadmap for what the team thinks needs to happen in order to achieve the strategic goals. This takes shape, for example, through planning in time or through kanban.	At portfolio level, planning by value will be based on items from the portfolio backlog that can be seen in conjunction in an overview on the board. This gives the leadership team an overview of ARTs and, if necessary, helps with decision-making in case of deviations.	The Plan to Value board of an ART depicts the roadmap related to the portfolio. During continuous delivery, milestones on this board are completed or adjusted and fine-tuned.
Act & respond	Managing contingencies such as problems or requests during plan implementation.	At portfolio level, this board has the important function of resolving requests, urgent changes in priorities and issues at portfolio level. These may be issues that an ART cannot resolve on its own and it can ensure that ARTs	At ART level, this component is important for quickly identifying problems and requests, determining their impact and responding appropriately so that maximum value can (continue to) be achieved in alignment with the

		remain aligned in doing so.	ART and the portfolio.

The integration of LWO with existing frameworks such as SAFe offers organisations a real gamechanger in achieving strategy, as for the first time everything becomes visible and connected. It also gets the team involved in all their meetings instead of being something 'separate'.

Synergy between LWO and SAFe principles

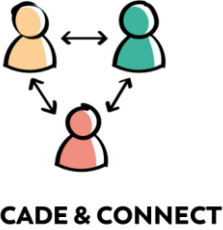The principles of LWO and SAFe show significant overlap and reinforce each other in promoting transparency, collaboration and continuous improvement within organisations. Both methodologies are strongly rooted in Lean thinking, which contributes to their mutual compatibility. You can clearly see this when we put the Lean principles and SAFe principles side by side.

LWO PRINCIPLE	SAFE PRINCIPLE(S)	APPENDIX
THINK IN SYSTEMS & OWNERSHIP	#1 Take an economic view	Because the team looks at the whole system, they can distinguish between the value of the planned work and how the organisation is currently doing on the various strategic aspects. This allows them to tactically and strategically prioritise the most valuable things needed at that moment.
	#2 Apply systems thinking	Both emphasise the importance of understanding and optimising the system as a whole. Both consider it a responsibility of the teams as they think about improvements, with SAFe explicitly naming this aspect as the responsibility of the Release Train Engineer (RTE) and Scrum Masters.
RHYTHM & ROUTINE	#9 Decentralise Decision-making	Ownership promotes responsibility and commitment. Facilitating decisions in the place where the knowledge is also located is crucial here.
	#4 Build incrementally with fast, integrated learning cycles	Getting regular feedback is crucial for the iterative development of both the system and the product or service.

	#7 Apply cadence, synchronise with cross-domain planning	SAFe specifically implements this principle by creating a synchronous rhythm across teams for planning, executing and inspecting value delivered.
	#6 Make value flow without interruptions	The cadence of Obeya meetings ensures that any disruption in the delivery of value can be escalated from shop floor to CEO within a day if necessary to restore flow.
SHARE CONTEXT & PROBLEMS VISUALLY	#2 Apply systems thinking	Through visualisations in the Obeya, the team oversees all aspects of the system they are driving, making it easier to make relationships and connections.
	#5 Base milestones on objective evaluation of working systems	The way milestones are visualised in LWO provides a visual link between what is being delivered and how it impacts Performance and strategy.
	#6 Make value flow without interruptions	Visually sharing context and problems helps teams understand and quickly resolve bottlenecks, this ensures an uninterrupted flow of value.
DEVELOP PEOPLE	#8 Unlock the intrinsic motivation of knowledge workers	Attention to people development promotes intrinsic motivation , leading to better performance and more innovation.

KEEP IMPROVING	#2 Apply Systems Thinking	Continuous improvement benefits from regular and objective evaluation of working systems so that adjustments can be made as needed.
	#4 Build incrementally with fast, integrated learning cycles	Continuous improvement allows teams to stay focused on maximising the value they deliver.
	#6 Make value flow without interruptions	Continuous improvement in the Obeya presupposes that the team is constantly looking for ways to improve flow in the production of value.
GO & SEE	#6 Make value flow without interruptions	By actually going to the shop floor, managers and team members can identify and solve problems faster, ensuring a smooth flow of value.
	#8 Unlock the intrinsic motivation of knowledge workers	Go & see means that management layers in the organisation engage in respectful dialogue with people who do the real work. This helps in better decision-making and appreciation of the knowledge present on the shop floor.
	#9 Decentralise decision-making	The "Go & See" principle promotes decentralised decision-making by involving those closest to the work in problem-solving.

CASCADE & CONNECT	#7 Apply cadence, synchronise with cross-domain planning	By cascading information and decisions and connecting teams, organisations can better handle variability and keep their options open.
	#10 Organize around value	No matter where in the organisation you walk into the Obeya, you will see the same visual structure and elaboration of strategic value reflected across all teams. As teams also adopt the LWO cadence and way of working, alignment on the value being worked on is set up at each team.

This table indicates that there is a lot of synergy to be found between SAFe and LWO. In the next section, we will discuss how this works out in practice.

PART II: AEGON CASE AND LESSONS LEARNED

In this part of the article, Ron van Vliet, one of the authors of this article will reflect on his own practical experiences.

"At the end of 2019, SAFe was introduced within Aegon for all IT development teams, resulting in the creation of 11 ARTs, with around 80 Agile teams. The Product Manager was responsible for the content direction of the ARTs, under the responsibility of an IT Delivery Manager. To support people management, Capability Managers were appointed. Each employee within the ART was guided by a Capability Manager in his/her development.

The implementation of SAFe led to significant improvements, such as faster time to market, higher NPS, better quality and higher employee satisfaction. This was confirmed by a scientific study by a former Agile Coach at Aegon, who eventually received his PhD from Leiden University (see the article "A Case for Data-Driven Agile Transformations: Can Longitudinal Backlog Data Help Guide Organisational Improvement Journeys?" by Gijsbert Boon and Christoph Johann Stettina, available via Springer).

I started as a Release Train Engineer (RTE) at Aegon in early 2020, in the middle of the corona pandemic. With the corona measures and the fact that not everyone came to the office every day (and this continued after the pandemic), the need arose for visual management tools to better visualise PI Planning and execution during the Planning Increment (PI).

This resulted, in early 2022, in the use of tools that created a virtual and digital Obeya to visually represent the work within the ARTs. Inspired by working with this digital Obeya, a fellow RTE attended LWO training. Enthusiastic after attending this training, he decided to apply the LWO method within his ART, linking the work to the ART's objectives and strategy.

Three ARTs were operating within the IT department at that time. From these 3 ARTs, IT4IT services were provided to the ARTs of the different Value Streams within Aegon, such as Mortgages, Life and Pensions. After the successful start and the first positive results and experiences in my colleague RTE's ART, I wanted to start applying LWO within my own ART as well. Because in our ART we were also faced with many different lists and reports, many incoming urgent requests, a lot of mutual email traffic and many coordination meetings, the Product Manager and I lacked overview of everything we were working on within the ART.

We were convinced that working with LWO would give us overview and save us a lot of time. Because the Product Owners were initially sceptical about applying LWO, we put a lot of effort together into convincing the Product Owners in our ART to start an experiment with LWO. By pointing out the time savings that working with LWO would bring through less email and coordination and ensuring that we would not have more meetings after the introduction of LWO, we were able to convince them.

After attending LWO training with everyone, who would be involved in the Obeya (which were the Product Manager, the System Architect (called the Ready Team at Aegon) and the Product Owners and Scrum Masters of the IT Delivery teams from the ART), we experimented with LWO for the first two PIs. After these first two PIs, we evaluated LWO and concluded that combining LWO with SAFe worked extremely well for us. During our experiment, the third ART also switched to working with LWO and there, too, the experiences were positive. Of course, we ran into all kinds of issues during the experiment, about which more on the challenges later in this section.

How is LWO combined with SAFe working ?

The integration of LWO with SAFe enables our teams to respond quickly to deviations from set targets. Through visual indicators, we can monitor our performance in real-time, allowing us to make continuous adjustments and continue to pursue our strategic goals. LWO adds value to SAFe by linking performance and work to strategy, resulting in an overview showing both performance metrics and work done. This allows us to see at a glance whether we are on track to achieve our strategic goals. This enables timely adjustments, and ensures that everyone in ART and the wider organisation understands how their contribution contributes to achieving these goals.

But how does LWO meet SAFe in practice? Both methodologies follow their own rhythm and have a specific set of interaction events. Within SAFe, we use several ART-level events, such as PI Planning, Inspect & Adapt, PO/ART Sync, Scrum of Scrums and System Demo. LWO uses the Quarterly Session, Plan to Value, Performance and Act & Respond, complemented by a Tough Problems Session for specific problem solving.

We integrated the SAFe events into the LWO meetings, with actions and objectives from the SAFe events coming back to the LWO meetings, but with optimised frequency. Although there were initial concerns that this combination would lead to a doubling of meetings, this proved not to be the case. Indeed, it resulted in a more streamlined approach, which ultimately saved time for all involved.

Act & Respond

Within Aegon, the RTEs facilitate the LWO meetings, including the Act & Respond (A&R) sessions that take place several times a week (2-3 times). The A&R lasts 30 minutes and during this session, incoming issues and requests are discussed and acted upon. In addition, team actions are reviewed, focusing on actions that are stuck or require important updates. This session is not a status update of all ongoing activities; only actions that are stuck or significant are discussed. This allows the session to be completed within 30 minutes, which can be challenging for Product Owners who are generally used to giving status updates.

The A&R replaces part of SAFe's PO/ART Sync, which normally takes place once or twice per iteration/sprint. By holding the A&R more frequently than the PO/ART Sync, urgent issues are continuously addressed. This prevents these issues from dominating the ART/PO Sync, leaving more room for discussing features and epics - the core topics of the ART/PO Sync.

However, it is important to note that the A&R is not a substitute for the stand-ups of the IT Delivery teams. LWO focuses only on ART level, not team level.

Performance

The Performance meeting is held every fortnight, corresponding to once per iteration/sprint. This meeting discusses the metrics used and assesses whether the desired performance levels are being achieved. If necessary, actions are defined for the A&R board, initiatives are adjusted, complex problems are identified for the Tough Problems Session, or desired performance levels are revised. LWO uses metrics and associated performance levels to link planned initiatives to the Strategic Direction and determine whether the ART is implementing the right initiatives. In addition to work initiatives planned during PI Planning, this includes run activities, and other key business initiatives such as HR, training, employee satisfaction, etc. Using real-time data allows for better decision-making

Unlike SAFe, where metrics such as KPIs and OKRs are often only minimally discussed during the Inspect & Adapt (I&A), in the Performance meeting we look at the metrics every fortnight to decide whether adjustment is needed. This ensures a better flow in delivering features and improvements within the SAFe context.

Plan to Value

The Plan To Value meeting also takes place every fortnight, corresponding to the ART/PO Sync in SAFe. In this session, we discuss the progress, obstacles, risks and dependencies of ongoing initiatives. These are precisely the topics that often get snowed under in the ART/PO Sync, as urgent issues often demand attention. By addressing these urgent issues in the A&R, the initiatives get the focus they deserve during the Plan to Value meeting. We only discuss the initiatives that get stuck due to obstacles or that require a major update, without status updates. Also for the Plan to Value meeting, if necessary, actions are defined for the A&R board, initiatives are updated or complex problems are identified for the Tough Problems Session.

To ensure that the Plan to Value board is not flooded with features, at Aegon we work with PI Goals and PI Objectives. At the beginning of the PI, the key goals for the upcoming PI are defined by the Ready Team, the PI Goals. During PI Planning, the teams define the key milestones for the upcoming PI, the PI Objectives. As SAFe mainly focuses on realising epics and features for new initiatives, we complement these PI Objectives with other important milestones in Finance, training, employee satisfaction and the like. In this way, we ensure that not only change but also run and management activities are included, thus providing a more holistic approach to our organisational objectives. And by using PI Objectives instead of features, we avoid overly detailed planning and only the most relevant team milestones are discussed in the Plan to Value.

Quarterly

A Quarterly Session is held quarterly within LWO, which serves to review the ART's Strategic direction, metrics, performance levels and modus operandi. We assess whether the quarterly targets have been met and post the initiatives for the coming quarter on the Plan to Value board. Although this session integrates well with SAFe's PI Planning, at Aegon we chose to keep them separate. The PI Planning is used to schedule work for the IT Development teams, which is time-consuming (as per SAFe, usually two days) and difficult to combine with quarterly planning. Incidentally, within LWO there is no procedure or meeting for analysing and defining new work.

Tough Problems Session

When we encounter a 'Tough Problem[2]', we organise a Tough Problem Session to find a solution together with the stakeholders. For this, we use a routine that includes experiments, exploring the problem and solving it step by step. This routine is called the Toyota Kata. Since a Tough Problem does not occur every week, we have scheduled a placeholder for these sessions in the diaries of all stakeholders.

SAFe meetings

With the integration of LWO meetings into the SAFe context, some traditional SAFe events have been dropped. The ART/PO Sync, Scrum of Scrums and Inspect & Adapt (I&A) are no longer part of our

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[2] A Tough Problem within LWO is defined as a problem where the solution lies beyond the existing knowledge frontier

regular meetings. We have integrated the objectives and activities of these events into the A&R, Performance and Plan to Value meetings. We have retained the System Demo, as showing results is a valuable addition to the LWO meetings.

As described above, we divided the actions and objective of the PO/ART Sync into the A&R, the Performance meeting and the Plan to Value, which allowed us to discontinue the PO/ART Sync as a separate meeting. Involving the Scrum Masters directly in the LWO meetings also made a separate Scrum of Scrums unnecessary. By discussing metrics more frequently in the Performance meeting, we also decided to drop the I&A. There is a caveat to this, however. This is because the more frequent reflection on performance within LWO is only performed by the core team, consisting of the Product Manager, System Architect, Release Train Engineer, Product Owners and/or Scrum Masters, while the I&A involves all members of the ART. However, our experience at Aegon was that I&A attendance was often disappointing. Moreover, we concluded that holding an I&A only once per PI resulted in too long a feedback loop, which hindered the flow of improvements. With more frequent discussion of metrics, though in a smaller team, the flow of improvements improved.

Although the total amount of meetings is slightly more time-consuming, the benefits of this new approach are clear: it enables a more effective working style that is better aligned with achieving strategic objectives. SAFe remains fully intact, including ART roles and constructs, Agile work teams, System Demo and PI Planning.

What did it achieve?

The integration of SAFe and LWO results in several synergistic benefits. Our ARTs who have implemented both methods report significant improvements in various aspects of their operations:

1. Transparency, overview and insight

Implementing LWO's visual management techniques within the SAFe context leads to significant improvements in transparency, communication and overall understanding. While SAFe's core principles, such as PI Planning and ARTs, promote team collaboration, LWO creates a physical or virtual space in which all relevant information for ART control is visually displayed. This results in a shared and clear picture of progress, challenges and successes for all involved. LWO extends the focus of SAFe by visualising not only epics and features, but the entire ART system, including supporting activities such as finance, compliance, training and employee satisfaction.

2. Connection with the rest of the organisation (through cascading)

The method of cascading with LWO enables effective translation of strategic organisational goals into specific objectives for different organisational units and ARTs. By applying LWO at each level, objectives are visually and transparently presented in the (virtual) Obeya. This promotes organisation-wide transparency and alignment, and clarifies how individual contributions and ART initiatives contribute to the overarching organisational strategy. This approach bridges the gap between SAFe implementations and higher management layers, who often struggle with SAFe-specific terminology and practices.

3. Decision-making: Better, faster and more effective decisions

The combination of SAFe and LWO facilitates improved strategic decision-making, based on up-to-date data and insights. This accelerates the delivery of epics and features, leading to accelerated value creation. It also ensures that value creation is balanced with continued successful operation

running. The core team gains deep insight into ongoing work. This enables them to stay closely involved in progress and quickly identify and resolve obstacles with the teams.

LWO plays a crucial role in strengthening ART's leadership and Strategic Direction. It encourages regular meetings within the Obeya, where visual tools are used to directly link ongoing work to strategic goals. By using metrics , progress towards these strategic goals is made transparent. This results in an integrated visual overview of various SAFe tools, including the Solution Vision, Strategic Themes, KPIs, OKRs, Measure & Grow metrics and the Planning Board.

4. Improvement capability: Agile and resilient organisation

The combination of SAFe and LWO fosters a culture of continuous improvement and adaptability. LWO's cyclical process of evaluation and adaptation complements SAFe's Inspect and Adapt (I&A) workshops. Whereas SAFe typically prescribes one I&A per PI, LWO facilitates more frequent moments of reflection. This results in an improved flow of improvements and value creation. By integrating LWO, SAFe's rhythms and routines are optimised, leading to increased operational efficiency and improved adaptability to changing conditions and customer needs.

5. Efficient responsiveness: Halving of email, reports and escalations

Practical experience at Aegon shows that the combination of SAFe and LWO leads to a significant reduction in email communication, reports and escalations. The introduction of regular A&R meetings, in which all incoming requests, issues and ongoing initiatives are discussed, has significantly reduced the need for email communication. The visualisation of 'the truth on the wall' has reduced the time spent on preparing management reports. Moreover, the close involvement of all team members in issues and initiatives has led to a proactive approach to problems, largely preventing escalations

These results highlight the effectiveness of the combined SAFe and LWO approach in improving organisational efficiency, transparency and agility. Applying LWO supercharged the SAFe implementation and is a game changer in strategy realisation.

What were the challenges?

Implementing LWO at Aegon was not without its challenges. Within my own ART, it initially took a lot of convincing to get everyone to see why LWO would be a valuable addition. During the implementation, we encountered several obstacles and learning points, which are shared below.

Starting with LWO

As indicated earlier, it took a lot of effort to convince the Product Owners in my ART to embrace LWO. What helped a lot was sharing positive experiences of Product Owners from other ARTs where LWO was already in use. We also chose to approach the introduction of LWO as an experiment. After two PIs, we would evaluate progress, which helped to lower the threshold for participation. We emphasised that LWO would save time for everyone and that it would not lead to extra meetings, as we could eliminate some SAFe events. When everyone was finally convinced to start LWO, we attended an LWO training where we not only learnt the concept, but also immediately started setting up the Obeya. With that, after the training, we were able to start using the routines right away

RTE as facilitator

Within Aegon, we chose the RTE as the facilitator of LWO meetings. Although LWO requires the facilitator to be independent, this was not quite the case in the case of the RTE. This is because the RTE is part of the Ready Team and is substantively involved in the work carried out within the ART. This meant that, as a facilitator, I had to regularly switch between different roles. I had to keep a close eye on whether I had to act in the role of facilitator or that of RTE. Consideration was also given at Aegon to the RTEs facilitating each other's Obeya meetings, but this would significantly increase the amount of meetings for the RTEs, so we decided against this. However, facilitation by the RTEs themselves did not cause any major problems, although it is good to be aware of the different roles.

Transparency hurts

Working with LWO brought complete transparency. In the Performance meeting, the performance of the team, and in our case the ART, is discussed. Whenever a metric falls below the desired performance level, it is visually displayed on the Obeya board with a red outline. This means looking together for ways to bring performance back to the desired level. The aim here is not to rebuke, but to improve. This requires a different way of looking at a 'red signal' - it becomes an opportunity to learn and improve together.

Yet initially, it proved challenging for Product Owners at Aegon to be completely transparent. Reporting problems was often seen as something negative, as it seemed to imply that you had not done your job properly. As a facilitator, it was crucial to create an atmosphere of openness and trust, so that everyone felt comfortable sharing problems. In the end, this worked out well at Aegon.

Mirror for behaviour

The Obeya not only provided transparency, but also mirrored the behaviour of the participants. In both the A&R and the Plan to Value and Performance meetings, it became immediately visible when agreements were not kept or actions were not executed. Making work visual makes participants' behaviour very clear. At the start of the Obeya at Aegon, Product Owners struggled with the fact that non-fulfilment of agreements was immediately visible. This sometimes led to discussions, as people were not used to being addressed so directly. Here again, the role of the facilitator emerged, who had to ensure that these conversations were held in an open and trusting manner.

Experiment!

An important aspect of working with LWO is that you should not wait until everything is perfect. Not all metrics on the board will be perfect from the start, and it is more important to start and experiment. Improvements can then be made based on experience.

At Aegon, for example, we struggled with the customer satisfaction metric in the beginning. This was measured only once per PI, which meant that the metric was often on the board in the Performance meeting without any updates. We eventually removed this metric, as it is necessary to update metrics regularly in order to make effective adjustments.

We also initially struggled with properly formulating the milestones on the Plan to Value board. In the beginning, Product Owners placed complete epics on the board, while these would only be delivered a few PIs later. The lesson was to clearly define the milestones and PI Objectives so that it was clear what deliverables would be delivered in the coming period. This means that a description of an epic, for example, should indicate which partial deliverables would be realised in the coming period.

These experiences taught us that experimentation is essential for success and that we had to be willing to learn and adapt as we gain more experience with LWO.

PART III: GETTING STARTED YOURSELF

How to take steps yourself

For those who are inspired by this article and want to learn more about or get started me   t the SAFe and LWO combination, we offer below some steps you can take :[3]

Step 1: Gain understanding and buy-in to Leading with Obeya

- Reading material and resources: Start by studying relevant literature, such as the book "Leading with Obeya" and articles on leadingwithobeya.com. This will provide a basic understanding of the method.
- Share this article: Distribute this article and initiate conversations with colleagues to gauge the need for this approach.
- Public sessions : Participate in free webinars and monthly public coaching sessions to learn from experienced practitioners and ask questions.
- Determine together what problem you want to solve with Obeya and that you want to work on it together.
- Make sure you set expectations about the next steps and have a committed leader or sponsor willing to go along with this.
- Pilot project: If necessary, initiate a pilot project within the SAFe implementation to evaluate the benefits of LWO in a controlled environment. This will provide an opportunity to gather feedback and make necessary adjustments.

Step 2: Training and deployment of expertise

- Training: Although working with LWO is not particularly complex, it differs substantially from conventional management. Everyone who starts using the Obeya according to the LWO method should undergo (some form of) training. This helps teams (including managers and business leads) quickly become effective in the Obeya and experience the benefits.
- Attending LWO-specific training courses helps Release Train Engineers (RTEs) get the principles and methods of LWO right and get the most out of the method for their ART.
- Engaging an LWO Specialist: LWO specialists are qualified coaches with specific expertise in LWO. Their in-depth knowledge of the subject matter and related forms of work enables them to guide teams in rapid and effective implementation.
- Combine with practice: Ideally, training should be taken by the whole team at the same time and combined with actually setting up the Obeya with the team as described in step 3.

Step 3: The (virtual) space and the content process

- Set up a space for the Obeya : Create a physical or digital space for the Obeya in which the five LWO components are visualised. Ensure that this space is accessible and functional for the entire team and other stakeholders within the organisation. In principle, the Obeya should be open to all people in the organisation.
- Use the five visual components: Strategic direction, Performance, Difficult Problems, Plan to Value, Act & Respond to maintain a complete overview and facilitate effective decision-

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[3] We assume you already work with SAFe, if you don't yet, please contact one of the authors of this article for information and advice.

making. While expansion is possible, these five components form the minimum basis for effective strategic direction within the Obeya.

- Setting up content for the Obeya: Go through each board step by step with the team, filling each board based on available strategic context, dashboards, portfolio, etc. Doing this together creates alignment between team members on the strategic plan, which then visually comes to life step by step on the walls of the Obeya.

Step 4: Introduce rhythm and routine

- Regular sessions: Integrate SAFe meetings with LWO as described in this article. Implement a consistent rhythm of Obeya sessions in line with LWO method. These sessions facilitate continuous progress monitoring and problem solving. Start immediately after the initial Obeya content setup is complete.
- Use of a facilitator: Practice shows that using a facilitator to guide the sessions is really a success factor. This ensures that a team experiences benefits faster in the Obeya and that team members can focus on the content. An LWO Facilitator is trained on the specifics of the templates, visual framework and routines of the LWO method.

Practical tips to avoid pitfalls

Based on our own experience and that teams who have started with this have given back to us, we want to give you a few more practical tips that are going to help you avoid pitfalls.

1. **Do it right the first time** - While LWO is not higher maths, a change in the way it works and the transparency it brings can have a big impact on the team. Therefore, make sure you ask an LWO Specialist with a SAFe background to guide you through this. A sponsor, timely training, carefully chosen pilot, Sharing this article with the team can also help you manage expectations. It will certainly not be flawless and with LWO, it is important to have the safety to make problems visible otherwise you cannot learn. But do take the first attempt seriously in preparation and commitment.
2. **Not extra, but integral** - Make sure you align LWO and SAFe sessions, documentation, etc. as much as possible. Don't put two worlds side by side, increasing the administration and meeting burden instead of reducing it. Some sessions can be replaced, others may even be dropped. Spend time asking for understanding that in the beginning some events might be duplicated until things are in place. Certainly ad hoc tune-ups will decrease, if you make the method work well for you.
3. **Committed leader and good facilitator** - In practice, these are two preconditions for working effectively with LWO. Above all, a leader of the team must take ownership and set frameworks within which the team can work effectively. A trained facilitator who can guide the conversation well and help make best use of the Obeya increases the team's effectiveness.

CONCLUSION

This article describes the benefits and opportunities that exist when SAFe and LWO are deployed in combination. We decided to write this piece out of enthusiasm about our own knowledge, experiences and insights we have gained from combining SAFe and LWO. In writing this piece, we were able to learn from both the theory of SAFe and LWO as well as the practical side and in this article, we will share those insights.

Where SAFe enhances the flow of value through the organisation, LWO helps optimise the flow of management information and decision-making. This is achieved through enhanced visualisation, sharpened focus, increased responsiveness and improved alignment within the organisation.

This approach promotes a culture of continuous improvement by encouraging joint seeing, learning and acting.

The integration of SAFe and LWO offers organisations a holistic method to both excel operationally and also effectively strategically aligned through various layers of the organisation. In short: applying LWO supercharged your SAFe implementation and is a game changer in realising your strategy!

SOURCES

https://scaledagile.com/

https://leadingwithobeya.com/

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Tim Wiegel, author of Leading with Obeya

Inspired by Toyota's use of Obeya during the development of the Prius in the 1990s, Tim Wiegel developed the Leading with Obeya (LWO) management method. Tim's book 'Leading with Obeya' has been translated into five languages and is making an impact worldwide. An experienced Lean and Agile practitioner and trainer, he trains, coaches and inspires leadership teams to improve their practices and bring strategy and execution together, using visual management and practical management routines.

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Want to know more? Contact the authors