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May, 2022

Co-existence between Half Double and SAFe

How the Half Double Methodology (HDM 1.0) can co-
exist and interact with the Scaled Agile Framework
(SAFe 5.1)

First edition, vers. 1.0

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Introduction

Purpose

The general purpose of the co-existence descriptions is to provide information to the project society as to how the Half Double Methodology (HDM) can be used in combination with existing Project Management and Agile standards, models, methodologies, and frameworks currently being used by many project-oriented organizations.

Target group

This specific existence description is targeted to the group of people and organizations currently applying the Scaled Agile Framework (SAFe) and who are now considering or determined to also adopt, implement and apply the Half Double Methodology (HDM). This document will inform how the SAFe 5.1 can benefit from being used in combination with HDM and vice versa.

Technical knowledge of projects and project management, agile initiatives, and agile project management, the HDM 1.0, Half Double Portfolio 1.0 and SAFe 5.1 is a prerequisite for being able to understand this document.

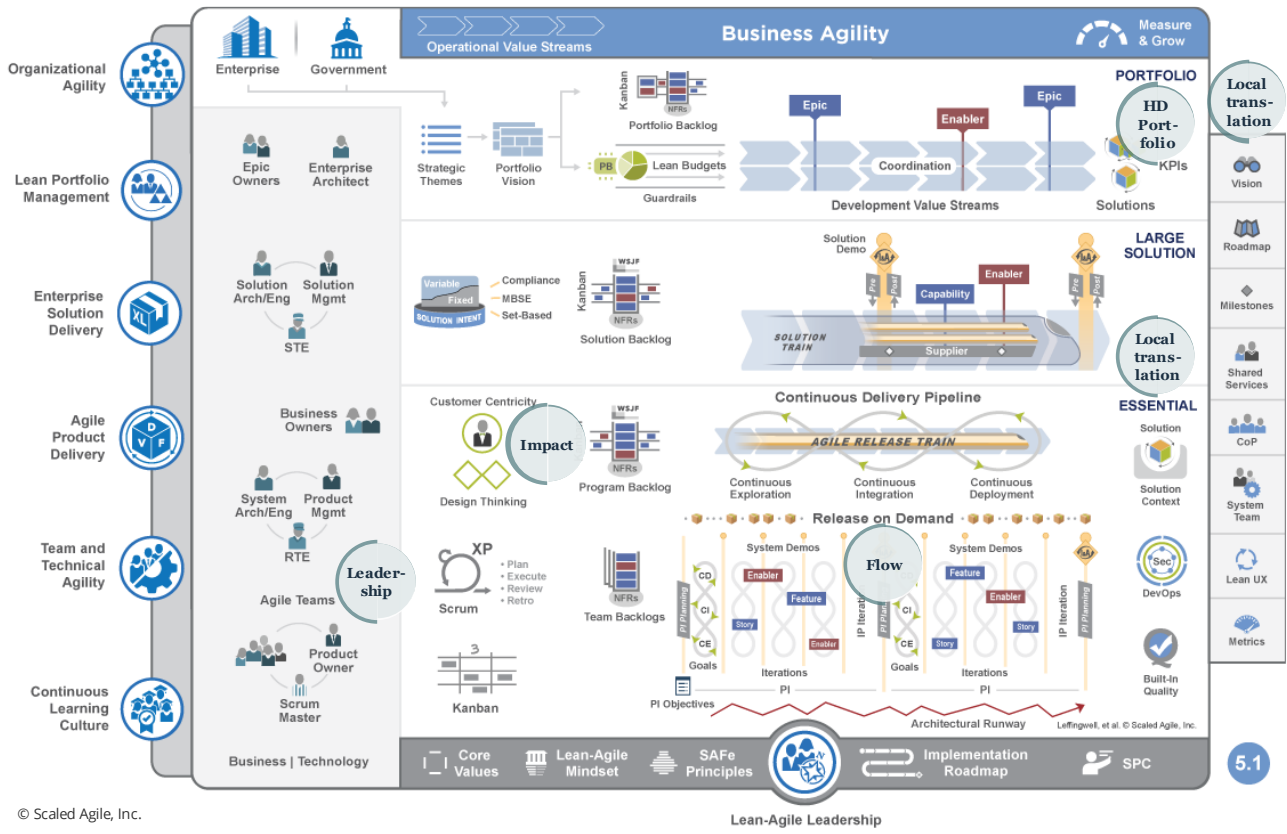
A project management methodology versus a concept for scaled agile work

In this document, we are looking at two conceptually different entities: a project management methodology and a framework for scaling agile ways of working from a team to an entire organization (enterprise). To put it simple a project methodology will pick and choose between different methods and practices to fulfill its purpose in a given project whereas the SAFe framework is a knowledge base of proven, integrated principles and practices for Lean, Agile, and DevOps to fulfill its purpose in an agile (software) enterprise context (see definition in Annex 4). SAFe is both a framework and a methodology whereas HDM is only a methodology.

Grafical illustration of the interactive “hot spots” between SAFe 5.1 and HDM (1.0)

The illustration provides an overview of how the two approaches overlap and interacts with each other. The overall conclusion is that SAFe is a broad framework whereas Half Double fits into parts of the framework at the project and portfolio level (the “essential” and “portfolio” configurations in SAFe). More specific there is 1) Direct relationship in philosophy and principles behind SAFe and Half Double, 2) Common methods in use such as design thinking (impact solution design), creating a cadence (fixed rhythm of events) and product owner (strong project owner) and 3) Overlap in Portfolio approach.

FIGURE 1: Grafical illustration of the interactive “hot spots” between SAFe 5.1 and HDM (1.0)



How the scaled agile framework will benefit from being used in combination with Half Double methodology and vice versa

Introduction

The Scaled Agile Framework aims at achieving business agility on an organisational level and puts in place several principles, practices, methods, and tools to achieve this goal. Half Double can supplement SAFe with methods that add focus on the necessary behavioural changes required to succeed and create impact at the project level.

Using Half Double and SAFe together can make good sense. A possible scenario would be that the Business and Technology leadership team would

use Half Double methods to build roadmaps and backlogs, while the Agile Teams use the Agile Release Train model from SAFe with the embedded SCRUM and Kanban approach.

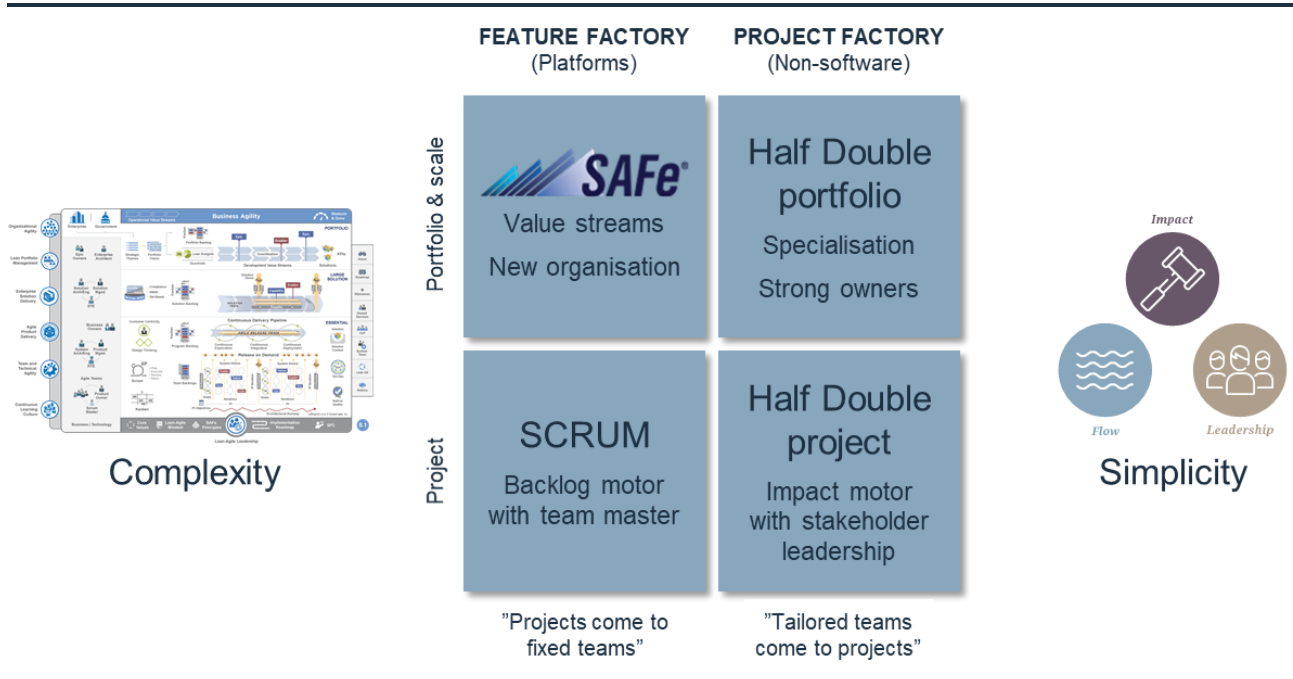
SAFe is based on LEAN and agile thinking which is also evident with Half Double. In general, a lot of similarities in philosophy and principles – however the big difference is that SAFe believe in creating fixed teams who handles new assignments (backlog items) each sprint whereas Half Double believe in complex projects with unique needs being handled by tailored teams with unique competences for each project. This is also the reason why Half Double continue using known roles such as “project leader” and “project owner” whereas SAFe would introduce new roles e.g., RTE (Release Train Engineer) and SCRUM master.

The other major difference is that the two approached are designed to different types of work; SAFe is designed for organisations working with continuous improvement of a (software) platform in a lean thinking way whereas Half Double is designed for organisations working with unique and complex projects contributing to individual solutions (e.g., product development). To put it shortly SAFe is great if you are running a “Feature factory” and Half Double is great if you are running a “Project factory” (see illustration below).

The Half Double Portfolio approach and Portfolio SAFe (a specific configuration of SAFe) address the same pains in the organisation (unclear value creation, too many projects at the same time and delayed decision-making), but with different degree of simplicity.

In Portfolio SAFe strategic themes will be converted to “Development Value Streams” with defined Epics and Enablers through a “Portfolio Backlog”. The Half Double Portfolio approach will address the portfolio level with more simplicity and focus on getting “Faster to strategic impact with fewer projects and closer relationships to decision-makers” using 9 different methods to achieve this. In essence the two approaches are very alike but SAFe would focus on creating a bigger organisational setup to support the portfolio level whereas Half Double would try to tap into the existing organisational structure and apply local translation.

FIGURE 2.



Impact to leverage agile product delivery

“Stakeholder satisfaction is the ultimate success criteria”, is the main message of the Impact principle of Half Double and perhaps the most important statement of Half Double. The two principles in SAFe that cover this is “Take an economic view” and “Base milestones on objective evaluation of working systems”. While these two principles are also incorporated in Half Double, the Impact Case treats behavioural change as a key driver to achieve real Business Impact.

An organisation that uses SAFe could potentially benefit from adoption a different language and process around the concept of Impact – using both business impact and behavioural impact when designing solutions and prioritizing the program and team backlogs.

Furthermore, the Impact Solution Design method could strengthen stakeholder interaction and customer centricity with a proven process for applying design thinking with the end goal of delivering higher impact in shorter time. The output of the Impact Solution Design could be used as ART input.

Simply put, Half Double could extend SAFe with the necessary tools to be able to deliver not only great solutions, but also the necessary change in the organisations that are to use the solution.

On the other hand, Half Double could benefit from the SAFe approach in terms of integrating Program and Team backlogs with the Impact Solution Design. Furthermore, the value stream setup and multiple SAFe roles would provide a pre-defined stakeholder landscape to relate to pulse checks and thereby ensure stakeholder satisfaction.

Agile product delivery with agile teams create a strong flow

SAFe has a complete description of how to achieve flow at both team, program, large solution and enterprise levels. The principles are in essence identical to Half Double and inspired by Lean and SCRUM methodology. An organisation,

that has adopted SAFe will most likely not benefit from adopting new methods to achieve flow. The main reason is that Half Double flow is based on SCRUM methodology such as visual planning and high allocation of team members. However, the limitation of the SCRUM methodology is inclusion of broad stakeholders and change behaviour management. The Half Double rhythm in key events include this aspect and can easily be added to the Project Increment in SAFe.

An organisation that has adopted Half Double will with ease be able to adopt the agile product delivery methods that SAFe uses to enable synchronisation across multiple teams – e.g., multiple projects running in the same cadence. This could benefit “collocation design” with 50% allocation of the team as the cadence is created for a group of projects and assigned for fixed periods.

Leadership as add on to the lean-agile leadership competence

The leadership dimension of Half Double focuses on the two roles of Project Leader and Project Owner and acknowledges the importance of direct link to a (portfolio) leadership team. SAFe has several more roles and teams and adds a strong focus on technical leadership as well as business leadership.

Half Double could help SAFe with a simple configuration of teams and leadership roles. In Half Double the Project leader is leading the project impact, stakeholder facilitation and are responsible for motivation of the individual. A broader responsibility than the Scrum Master in SAFe. Also, the Project Owner role would include the link from project level to business owner level simplifying the number of roles in SAFe (product owner + product management + business owner) to one role. Also, the “Reflective and adaptive mindset” could inspire the Lean-Agile leadership competence in terms of leveraging the reflection and behavioural change competence in the SAFe Enterprise.

Half Double could benefit from the SAFe agile team setup and elaborated role descriptions to scale and align roles cross organisational roles in

feature-oriented organisation. Furthermore, in terms of the portfolio leadership SAFe could enrich Half Double with terminology and methods around technical leadership for large technical solutions.

Summarising

SAFe and Half Double are close in terms of underlying philosophy, and both deploys underlying principles from Agile and Lean. SAFe addresses a lot more on the scalability and synchronisation on complex technical solutions while Half Double addresses the behavioural change needed in order to create value from the complex solutions.

Half Double is “only” a project methodology whereas SAFe is a framework for scaling one agile team to many agile teams running in Agile Release Trains and coordinated with the overall portfolio and Development Value Streams of the enterprise.

Simply put, Half Double could work well as the “project engine” in a SAFe setup instead of a using the default “SCRUM project engine”

embedded in SAFe. This would extend the impact dimension in each agile team to include behavioural impact as well as technical outputs. It would also extend the leadership dimension in agile teams in terms of a reflective practise to support the people / stakeholder dimension and not just technical outputs.

Half Double could extend SAFe with the necessary tools to be able to deliver not only great solutions, but also the necessary change in the organisations and with customers that are to use the solution.

Half Double could benefit from the Scaled Agile Framework when scaling from one project to many projects in a platform creation or “feature factory” oriented organisation.

Both the Half Double Methodology and the Scaled Agile Framework are designed to be adapted to the specific context, which is called Local translation in Half Double and Configuration in SAFe.

Annex 1:

Half Double 1.0 and SAFe 5.1 at a glance

FIGURE 1: Half Double Methodology overview

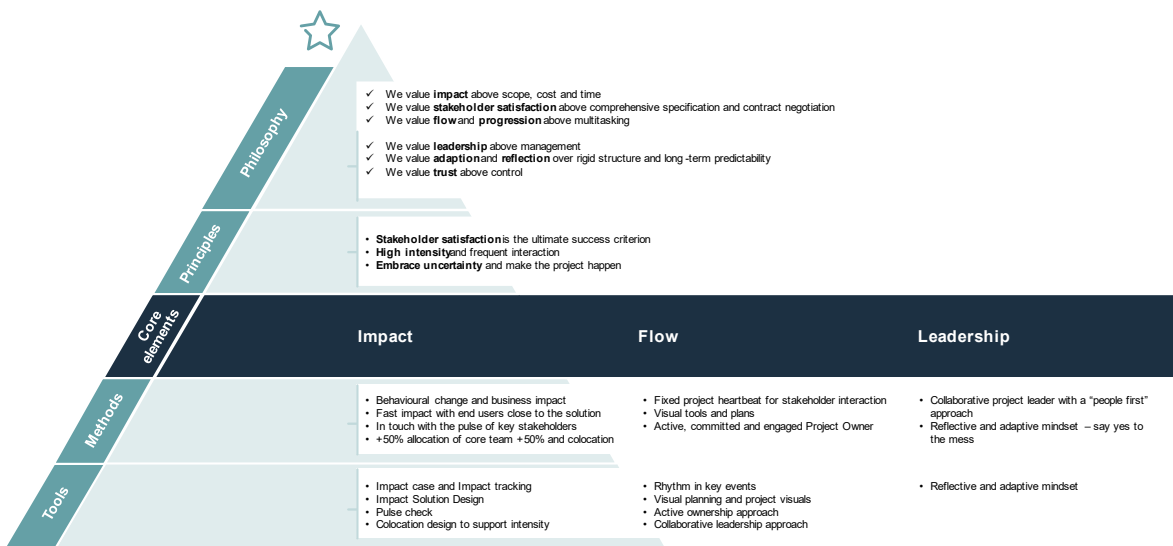
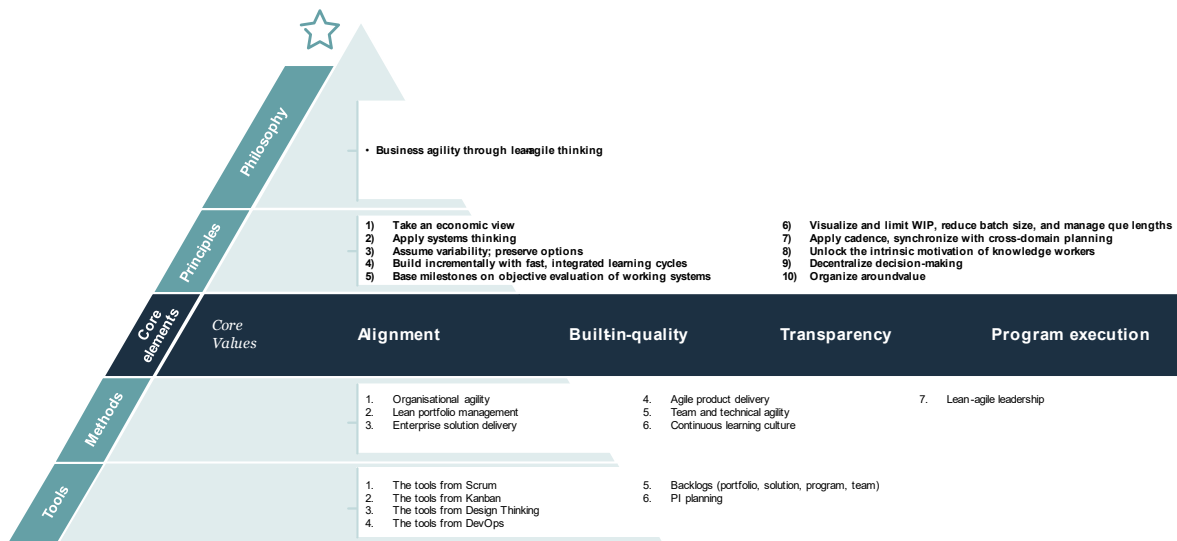


FIGURE 2: SAFe overview



Annex 2:

A comparison view between Half Double (HDM 1.0) and SAFe 5.1

In the comparison view below is listed some key topics of both Half Double and PRINCE2 indicating some of the differences between the Half Double methodology and the PRINCE2 methodology.

Topic	Half Double	SAFe
Approach:	Hybrid	Agile
Methodology:	The Half Double methodology represented by 3 core elements each containing 3 methods.	7 core competencies with 3 dimensions that can be configured to suit the organisation. Based on 10 immutable principles.
Characteristics:	Double the impact in half the time.	Achieve business agility on an enterprise level. Respond to volatile market conditions, changing customer needs and emerging technology.
Focus:	Deep dive into Impact, Flow and Leadership (narrow).	Configure and apply a proven set of practices, methods and tools.
History:	Developed in the late 2010's.	Initially released in 2011 and continuously updated by the Scale Agile Incorporation to a current version 5.1

Annex 3:

A cross reference guide between Half Double (HDM 1.0) and SAFe 5.1

The cross-reference guide below has been prepared to outline where SAFe directly supports the three core elements of Half Double: Impact, Flow & Leadership.

Half Double core elements and methods	Scaled Agile Framework core competencies and dimensions
<p>Impact</p> <ol style="list-style-type: none"> 1. Use the impact case to drive behavioural change and business impact. 2. Design your project to deliver impact as soon as possible with the end users close to the solution. 3. Check the pulse of your project. 	<p>Philosophy/competence overview:</p> <ul style="list-style-type: none"> • The Agile Product Delivery competence • SAFe Lean-Agile mindset = Value • SAFe Core values (alignment and transparency) <p>Principles:</p> <ul style="list-style-type: none"> • SAFe Principle #1 (Take an economic view) • SAFe Principle #2 (Apply systems thinking) <p>Practises and methods:</p> <ul style="list-style-type: none"> • Design thinking • Program Backlog • Team Backlogs • Agile Release Train (to some extend similar to Impact Solution Design at program level)
<p>Flow</p> <ol style="list-style-type: none"> 1. Allocate core-team min. 50% to the project and ensure colocation. 2. Increase insights and commitment using visual tools and plans. 3. Define a fixed project heartbeat for stakeholder interaction to project in sprints. 	<p>Philosophy/competence overview:</p> <ul style="list-style-type: none"> • The Agile Product Delivery competence • The Team and Technical Agility competence • SAFe Lean-Agile mindset = Flow • SAFe Core values (Transparency, built-in quality and program execution) <p>Principles:</p> <ul style="list-style-type: none"> • SAFe Principle #4 (Build incrementally with fast, integrated learning cycles) • SAFe Principle #6 (Visualize and limit WIP, reduce batch sizes, and manage queue length) • SAFe Principle #7 (Apply cadence, synchronize with cross-domain planning)

Half Double core elements and methods	Scaled Agile Framework core competencies and dimensions
	<p>Practises and methods:</p> <ul style="list-style-type: none"> • SCRUM • Team Backlogs • Program Increment • System Demos • Goals • Built-in quality • Solution
<p>Leadership</p> <ol style="list-style-type: none"> 1. Be an active committed and engaged project owner. 2. Be a collaborative leader with a people first attitude. 3. Apply a reflective and adaptive mindset. 	<p>Philosophy/competence overview:</p> <ul style="list-style-type: none"> • The Lean-Agile Leadership competence, • SAFe Lean-Agile mindset = Leadership • SAFe Core values (alignment and program execution) <p>Principles:</p> <ul style="list-style-type: none"> • SAFe Principle #3 (Assume variability; preserve options) • SAFe Principle #8 (Unlock the intrinsic motivation of knowledge workers) • SAFe Principle #9 (Decentralize decision-making) <p>Practises and methods:</p> <ul style="list-style-type: none"> • Agile teams • Product management • Business owners
<p>Local Translation</p> <ol style="list-style-type: none"> 1. Build a Half Double mindset to initiate the Half Double approach. 2. Customize governance to ensure flow 3. Anchor the Half Double practice to pave the way for new results 	<p>Philosophy/competence overview:</p> <ul style="list-style-type: none"> • Organizational Agility • SAFe Core values (transparency) <p>Principles:</p> <ul style="list-style-type: none"> • SAFe Principle #2 (Apply systems thinking) • SAFe Principle #9 (Decentralize decision-making) <p>Practises and methods:</p> <ul style="list-style-type: none"> • SAFe Configuration (Essential SAFe + Portfolio SAFe + Large Solution SAFe = Full SAFe)

Annex 4:

Definitions

Term	Definition	Reference
Method	A means for achieving an outcome, output, result, or project deliverable.	Project Management Institute (2021 page 243).
Methodology	A methodology is an organized collection of concepts, methods, values and normative principles supported by material resources.	Adapted from Hirschheim et al (1995 page 22).
Body of Knowledge	A body of knowledge (BOK or BoK) is the complete set of concepts, terms, and activities that make up a professional domain, as defined by the relevant learned society or professional association (Wikipedia 2019).	Wikipedia (2019) Body of Knowledge. https://en.wikipedia.org/wiki/Body_of_knowledge . Retrieved 22nd November 2021
Agile approach	A term used to describe a mindset of values and principles as set forth in the Agile Manifesto	Project Management Institute (2021 page 235).
Planned approach (predictive approach)	An approach in which the project scope, time, and cost are determined in the early phases of the life cycle.	Adapted from Project Management Institute (2021 page 244).
Hybrid approach	A combination of two or more agile and nonagile elements.	Adapted from Project Management Institute (2021 page 241).
A Standard for Project Management	A Standard for Project Management is defined as the standard for application of knowledge, skills, tools, and techniques to project activities to meet project requirements. Project management refers to guiding the project work to deliver the intended outcomes.	
The Scaled Agile Framework (SAFe)	A framework for enterprise agility: SAFe® is a freely available knowledge base of proven, integrated principles and practices for Lean, Agile, and DevOps.	Teaching materials for “Leading SAFe B&W Slides (V4.5)”, 2018, Scaled Agile, Inc.

Annex 5: *References*

#	Reference
[1]	SAFe 5.1 accessible at https://www.scaledagileframework.com/ , 2022 Scaled Agile Inc. Also described in “SAFe 5.0 Distilled; Achieving Business Agility with the Scaled Agile Framework”, 1st Edition, Richard Knaster & Dean Leffingwell, 2021
[2]	Project Management Institute (2021). A Guide to the Project Management Body of Knowledge PMBOK guide and The Standard for Project Management (ANSI/PMI 99-001-2021). Newton Square, Pennsylvania, Project Management Institute, Inc.
[3]	Hirschheim, R., H. K. Klein and K. Lyytinen (1995). Information systems development and data modeling: conceptual and philosophical foundations, Cambridge University Press New York, NY, USA.

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