

# Coaching Agile Transformations Learning Outcomes

Version 2.0



# LICENSING INFORMATION

The work in this document was facilitated by the International Consortium for Agile (ICAgile) and done by the contribution of various Agile Experts and Practitioners. These Learning Outcomes are intended to help the growing Agile community worldwide.

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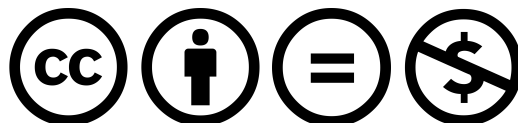
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# **SPECIAL THANKS**

ICAgile would like to thank the contributors to the Coaching Agile Transformations Learning Outcomes:

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# HOW TO READ THIS DOCUMENT

This document outlines the Learning Outcomes that must be addressed by accredited training organizations intending to offer ICAgile's Coaching Agile Transformations certification.

Each LO follows a particular pattern, described below.

## **0.0.0. Learning Outcome Name**

*Additional Context, describing why this Learning Outcome is important or what it is intended to impart.*

The Learning Outcome purpose, further describing what is expected to be imparted on the learner (e.g. a key point, framework, model, approach, technique, or skill).

# LEARNING OUTCOMES

## 1. EXPLORING LEADERSHIP AND CULTURE

### 1.1. LEADERSHIP STYLES AND ORGANIZATIONAL CULTURE

#### 1.1.1. Enterprise Agile Coaching Skills

*Enterprise Agile Coaching emerged as agile implementations expanded beyond the team level to include all manner of organizational challenges. The context of working at the enterprise level means seeing the whole organization, not just one department such as IT, and includes an expansion of team coaching skills.*

Enterprise Agile Coaching includes a set of skills that enable practitioners to catalyze the adaptation and transformation of business agility in alignment with the organization's vision, goals, and needs in a turbulent and complex world. These skills are an expansion from agile team coaching skills. Coaching skills needed at an enterprise scale (larger organizations) include experience in the domain and disciplines of business and management consulting, working with organizational structures and culture, developing leaders, change and program management, and complex adaptive systems - all with the intention of enabling business agility.

Present the whole scope of Enterprise Agile Coaching and highlight which skills will be covered in this course.

#### 1.1.2. Leadership Styles and Development

*Organizational agility is limited by the maturity level of leadership at all levels within the organization. When leaders are able to handle complex and ambiguous situations, model aligned agile behaviors, and be transparent about their own learning and growth, it is far more likely that the organization can follow suit. Enterprise Agile Coaching is highly informed by an awareness of the impact leadership maturity has on organizational agility.*

Introduce leadership styles and one or more research-based approaches to how leaders develop (vertical and horizontal). Like culture, the level of maturity in the leadership environment provides an enabler or constraint on the degree of organizational agility possible. Example models include Leadership Circle Profile, Leadership Agility, and Intent-Based Leadership.

### 1.2. ORGANIZATIONAL CULTURE AND ALIGNMENT

#### 1.2.1. Organizational Culture Models

*Organizational culture refers to the shared values and beliefs that govern the behaviors and interactions of the people in an organization - whether visible or invisible. Awareness of the organizational culture is required when coaching agile transformations.*

Introduce one or more models of organizational culture to bring awareness of culture patterns and norms (i.e., William Schneider's Model, Edgar Schein's Model, Tribal Leadership, Spiral Dynamics, Competing Values Framework).

### **1.2.2. Approaches to Culture Assessment**

*Enterprise Agile Coaching practitioners serve both Agile values and principles and the organization in dynamic tension. In doing so, it requires attention to both the organizational culture and its alignment with agility.*

Explore tools to coach the organization through assessing its culture and alignment to agile values, and the desired future-state culture. It is important to recognize and celebrate the qualities of the current culture that support positive behaviors and habits within the organization as well as the qualities that may hinder the organization's ability to transition to the desired future state.

## **2. CHANGE PROCESSES AND STRATEGIES**

### **2.1. ORGANIZATION AND HUMAN CHANGE PROCESSES**

#### **2.1.1. Business Case for Change**

*In order for any organizational change to be effective, it is essential that a case for change is made in terms of the business and mission (not technical terms) and that business people be partners in driving the change.*

Explain the importance of business involvement in organizational change. The business case for change starts with a vision of what the organization wants to accomplish through agility and articulates benefits that resonate with business people. Goals for the change should be articulated in business terms, not merely change program terms (e.g., from “xxx number of people will be trained in Agile” to “productivity will improve by xx% when we align on priorities and structure around agile teams”), so that the overall change sponsor understands what they will achieve through agility and that it justifies the organization's investment.

#### **2.1.2. Human Change Process**

*Any change within an organization has at least two aspects, the tangible change (whether technical, business, or organizational) and the human response to that change. Making real change requires more than driving through a list of “change management” to-dos. It includes helping people understand what it means to them and move through their own internal change process to successfully adapt to the change.*

Deep dive into two or more models of the human change process (e.g., Edge Theory, Kubler-Ross, Virginia Satir Change Model, David Rock's SCARF Model, and Neuroleadership) with a focus on how to use the model(s) to help people cross over their edge and work through and benefit from the changes in themselves that agile instigates.

### **2.1.3. Organizational Change Process**

*Organizations are complex, and changing them is an even more complex proposition. A structured and informed approach to the change process improves the chances of success of an agile transformation.*

Introduce one or more models for organizational change (i.e., Appreciative Inquiry, Edge Theory, ADKAR) and identify ways to develop a tailored and intentional process that engages the whole system in the change.

### **2.1.4. Bringing an Agile Mindset to Change**

*Agile brings about a mindset shift from “change as an exception” to “change as a norm.” This mindset shift should be infused into the organizational change process. Approaching change in a positive, creative, collaborative, and continuous way enables an effective and sustainable agile practice.*

Explore the impacts of using a continuous change process or processes that embrace an agile mindset, values, and principles at every level within the organization as compared to a traditional top-down, phase-gate, or Gantt-chart method.

## **2.2. AGILE TRANSITION AND TRANSFORMATION CHANGE STRATEGIES**

### **2.2.1. Organizational Assessments**

*Assessments are a tool for Enterprise Agile Coaching and are used early in any engagement. They support increased awareness and understanding of the current state and are used to inform a realistic change intervention. The outcomes of assessments are inputs to the eventual change strategy chosen and may inform or update the results of systems entry.*

Introduce the overall assessment process which typically includes a kickoff, conducting the assessment, and the recommendations and debrief (written and/or oral) of the results. Explain the dimensions, modalities, and processes for conducting an effective organizational assessment. The dimensions may include culture, organizational structures and processes, business alignment and agility, technical practices, leadership maturity, and change readiness. The modalities may include interviews, surveys, large group methods, observation, orientation training, etc.

### **2.2.2. Strategy and Contract for Change**

*The organizational change strategy and its various components, including assessment, strategy development, and implementation, provide a necessary foundation for the success of any agile transformation initiative. Guiding leaders in developing their change strategy is critical for an effective change process.*

Introduce components that support a well-thought-out change strategy including, but not limited to, a stakeholder analysis, communications approach, training approach, adoption/rollout strategy, and overall coaching approach. Explain different forms that the change strategy could take including an agility backlog, a roadmap, vision documents, written, etc. Explain a variety of approaches for



coaching the development and implementation of an organizational change strategy. An effective approach should leverage Agile principles such as co-creation through collaboration, incremental change, transparency, fast feedback, and frequent inspect and adapt cycles.

### **2.2.3. Organizational Impediments to Change**

*Organizational impediments are often revealed during change initiatives and can have a significant impact on the overall success of the effort. The ability to separate the symptoms exposed by impediments from underlying root causes and more fundamental issues is an important skill for Enterprise Agile Coaching.*

Recognize and explain the impacts of different types of impediments including strategic, structural, cultural, and educational are important to identifying and addressing them effectively. Strategic impediments may include misaligned goals, vision, business drivers for change, lack of product visioning, organizational visioning, etc. Structural impediments may include roles and responsibilities, performance measures and rewards, compliance, and financial controls. Cultural impediments may include leadership values and principles, collaboration and competition, team vs. individual drivers, etc. Educational impediments may include understanding new roles, processes, structures, and leadership competencies to drive an effective agile approach.

### **2.2.4. Communicating at an Organizational Level**

*Given change is a human process, people need to be able to clearly envision the future state, understand the compelling “why” for the change, and be able to relate it to their work lives. In addition, the goal of communicating across the organization should be to establish a multi-directional communication process.*

Explain how a communication strategy and execution plan provide a clear pathway for people in the organization to know what is expected, what to do, and a way to provide feedback. Enterprise Agile Coaching practitioners may not lead the communication strategy or execute the communication plan, but they need to help the client with this process. Any communication approach should consider the target audiences, key talking points/messages, and delivery mechanisms. In keeping with agile values, and principles, transparency of communication and frequent updating of any communication “plan” and progress is recommended.

## **3. COACHING THROUGH CHANGE**

### **3.1. COACHING AND ADVISING LEADERS**

#### **3.1.1. Enterprise Agile Coaching "Contract"**

*Effective practitioners of Enterprise Agile Coaching, whether internal or external to the organization, know how to make agreements with key stakeholders on how the coaching engagement will proceed. This involves those directly affected as well as those “paying for” or authorizing the coach’s services.*

Convey the importance of a coaching contract, that it is not a “legal” contract but rather an agreement between the parties. How to negotiate such an agreement,

why it's important to coaching success, how it helps bound what the coach will and will not do, as well as what the client will and will not do.

### **3.1.2. Professional Coaching**

*Professional coaching skills can support an executive as they make the personal and professional changes needed to truly support the agile change initiative.*

Practice having a coaching conversation from beginning to end using foundational professional coaching skills, starting with designing the alliance to identifying the issue(s) for coaching, exploring the issue, and helping the client come to an action commitment. The learner should also be able to recognize when they are in territory beyond their own abilities and need to call in someone with different or deeper skills. Coaching leaders requires ongoing practice and development of skills along with having business/leadership experience. Bring awareness of leadership coaching development programs such as Co-Active, Center for Executive Coaching, Institute of Coaching, and Erickson Coach International.

### **3.1.3. Trusted Advisor**

*A key stance or skill for Enterprise Agile Coaching is the ability to earn the trust and confidence of executives in a trusted advisor relationship.*

Introduce the concept and characteristics of a trusted adviser - being a strategic partner with your client begins with placing a higher value on maintaining and preserving the relationship itself than on the outcomes of the engagement. Characteristics of a trusted advisor include focused listening without pre-judging or supposing an answer, credibility established through experience, and willingness to see the leader as an equal in a joint journey. Being a trusted advisor is an ongoing process that takes time.

### **3.1.4. Engaging Leadership in Conversation about Culture**

*Responsible leaders will want to make informed decisions when instilling an “agile culture” in an organization given their organization’s culture, while understanding the implications in doing so.*

Explore ways to engage leaders in a conversation about their impact on culture and support them in making organizational culture-aware decisions that guide the journey towards business agility. Introduce ways to reveal an organization's culture, including multiple perspectives about culture, leaders' aspirations about agility, and the organization culture's compatibility, or conflict, with the agile culture. The learner should be aware that subcultures often exist in large enterprises and should be revealed in the assessment and included in the conversation. Example models/tools include Argyris' Double/Triple-Loop Learning, Senge's Learning Organization, and Kevin Oakes Culture Renovation.

## **3.2. SELF-MASTERY, PROFESSIONAL DEVELOPMENT AND ETHICS**

### **3.2.1. Learning Journeys and Professional Development**

*Partnership with the areas of the organization that focus on learning and development is a key skill of Enterprise Agile Coaching.*

Introduce the concept of deliberately developmental organizations. Identify where learning is supported in the organization and how it is reinforced in the culture. Introduce coaching approaches to create engagement and partnership with the appropriate areas of the organization such as HR, L&D, and senior leaders in service of creating learning pathways aligned to agility. This partnership designs and coordinates the execution of education across the organization to enable business agility.

### **3.2.2. Personal and Professional Mastery**

*Practitioners of Enterprise Agile Coaching work across an organization as a model and guide for harnessing change. As such, it is imperative that they strive for continuous self-improvement with a conscious commitment to deepening their professional competencies, knowing their own limits, and increasing their own level of emotional and leadership maturity.*

Identify the boundaries and limits of their current skills and leadership maturity. Knowing one's own limits leads to opportunities to pair and collaborate with others which is essential when working across organizations. Explain intentions to evolve their knowledge and develop their own emotional and leadership maturity in order to be an effective instrument of their craft. The implication is that practitioners are willing to work on themselves as much as on their knowledge and competencies.

### **3.2.3. Ethical Considerations of Enterprise Agile Coaching**

*Understanding our own ethical boundaries as a coach helps us know what and where our limits are.*

Define what ethical considerations should be addressed when coaching across the enterprise. Explore this topic from the perspective of a leader, agile coach, and their own personal boundaries. Introduce the learner to the Agile Alliance Code of Ethics initiative.