ICA Agile Learning Roadmap
Enterprise Agile Coaching Track

Learning Objectives
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 objectives are intended to help the growing Agile community worldwide and as such this work is licensed under the following license.

Creative Commons Attribution 4.0 International License

http://creativecommons.org/licenses/by/4.0/legalcode

You are free to:

• Share — copy and redistribute the material in any medium or format
• Adapt — remix, transform, and build upon the material for any purpose.

Under the following terms:

• Attribution — You must give appropriate credit to The International Consortium for Agile (ICAgile), provide a link to the license, and indicate if changes were made. You may do so in any reasonable manner, but not in any way that suggests the licensor endorses you or your use.

Notices:

• No warranties are given. The license may not give you all of the permissions necessary for your intended use. For example, other rights such as publicity, privacy, or moral rights may limit how you use the material.
Special Thanks

ICAgile would like to give special thanks to the following contributors of the Enterprise Agile Coaching Track.

- Marsha Acker
- Lyssa Adkins
- Pete Behrens
- Michael Spayd

In addition, ICAgile would like to give special thanks to the following reviewers of the Enterprise Agile Coaching Track.

- Roger Brown
- Sally Elatta
- Jeff Lopez-Stuit
- Paul Mahoney
- Charlie Rudd
Table of Contents

Preamble .................................................................................................................................................. 6
Working Draft ........................................................................................................................................ 6
Purpose .................................................................................................................................................. 6
Scope ...................................................................................................................................................... 6
Definitions .............................................................................................................................................. 7

Enterprise & Organization .................................................................................................................... 7
Business Agility ....................................................................................................................................... 7
Organizational Agility ........................................................................................................................... 7
Enterprise Agility ..................................................................................................................................... 7
Enterprise Agile Coaching .................................................................................................................... 7
Transition & Transformation .................................................................................................................. 7

1. Enterprise Agile Coaching Skills and Scope ...................................................................................... 8
   1.1 Theme: The Field of Enterprise Agile Coaching ........................................................................... 8
       LO: What is the field of Enterprise Agile Coaching? ................................................................. 8
       LO: Understanding Enterprise Agile Coaching Competencies .............................................. 8
   1.2 Theme: Self-Mastery, Professional Development and Ethics ..................................................... 10
       LO: Ethical Considerations of Enterprise Agile Coaching ..................................................... 10
       LO: Knowing your Own Limits and Boundaries ..................................................................... 11

2. Enterprise & Business Agility ............................................................................................................ 12
   2.1 Theme: Understanding the Whole Value Stream ....................................................................... 12
       LO: Understanding Systems and Complexity Theory ............................................................. 12
       LO: Lean Underpinnings & Mindset ......................................................................................... 12
   2.2 Theme: Business Agility ........................................................................................................... 13
       LO: Understanding Business Agility ....................................................................................... 13
       LO: Extending Agility to the Enterprise .................................................................................. 13
       LO: Measuring Business Performance with Agility in Mind .................................................... 14

3. Organizational Structures and Processes ........................................................................................... 14
   3.1 Theme: Organization Design and Structure .............................................................................. 14
       LO: Awareness of Organizational Structure ........................................................................... 14
       LO: Adaptive Principles and Patterns for Organizational Design ........................................... 15
       LO: Agile Frameworks for Enterprise Scaling ........................................................................ 15
   3.2 Theme: Organizational Processes and Improvement .................................................................. 16
       LO: Understanding Business Processes and their Impact ....................................................... 16
       LO: Agile Business Process Improvement .............................................................................. 16

4. Leadership and Culture ....................................................................................................................... 17
   4.1 Theme: Working with Leaders .................................................................................................... 17
       LO: Understanding and Working with Executive Teams ......................................................... 17
       LO: Understanding Executive Coaching vs Advising ............................................................ 17
       LO: Understanding Leadership Development ......................................................................... 18
   4.2 Theme: Organizational Culture and Alignment ......................................................................... 18
       LO: Understanding Organizational Culture ............................................................................ 18
       LO: Engaging Leadership in Conversation about Culture ....................................................... 19
   4.3 Theme: Developing an Agile Team Culture ............................................................................... 19
LO: Health and Sustainability of Agile Teams and Agile Processes ........................................ 19
LO: Enabling Technical Craftsmanship in the Team Culture .................................................... 20
LO: Application: Integrating Leadership, Culture and Teams .................................................. 20
5. Change and Agile Transitions .......................................................................................... 21
  5.1 Theme: Organization and Human Change Processes ...................................................... 21
      LO: Creating a Business Case for Change ........................................................................ 21
      LO: Understanding the Human Change Process ............................................................... 22
      LO: Understanding the Organizational Change Process .................................................... 22
      LO: Bringing the Agile Mindset to Change ...................................................................... 22
  5.2 Theme: Agile Transition and Transformation Change Strategies ................................... 23
      LO: Understanding Organization Systems Entry .............................................................. 23
      LO: Components and Considerations of Organizational Assessments .......................... 23
      LO: Co-Creating an Organizational Change Strategy ....................................................... 24
      LO: Application: Conducting Assessments, Designing Strategy and Contracting for Change ........................................................................................................................................ 24
  5.3 Theme: Working with Organizational Impediments ....................................................... 25
      LO: Understanding Organizational Impediments ............................................................. 25
      LO: Identifying and Addressing Organizational Impediments ........................................ 26
  5.4 Theme: Communicating, Educating and Facilitating for Organizational Change ............ 27
      LO: Communicating at an Organizational Level ............................................................... 27
      LO: Educating at an Organizational Level ....................................................................... 27
      LO: Awareness of Large Group Facilitation Methods ...................................................... 28
      LO: Facilitating at an Organizational Level ..................................................................... 28
Preamble

Working Draft
This definition of Enterprise Agile Coaching (EAC) is a working draft currently in beta form. Both course developers and learners should be aware that the themes, learning objectives and document structures will likely change as feedback is provided. While in the beta form, this version is intended to help course developers think through the feasibility of courses and offer feedback; it is not intended to be used to develop marketable courses or chart a definitive education path towards the EAC expert gate. Everyone is welcome to provide feedback.

The hours of engagement identified for each theme in this track provide an initial consideration on the depth of learning, for instance presenting high-level concepts vs. in-depth exercises to create deep insight and understanding. Feedback regarding the structure, delivery and depth of various sections and themes in this track across one or more workshops is welcome.

Purpose
The purpose of the Enterprise Agile Coaching (EAC) track is to introduce learners to the foundational knowledge required for agile coaching practitioners working at an enterprise level. That knowledge, combined with developing skills and practicing at an enterprise level, provides the pathway for agile coaches and leaders seeking to be more effective at an enterprise level.

Scope
The goal is for the learner to develop a rich understanding of the complexity and scope of the knowledge required to work at the enterprise level. The learner will be introduced to applicable knowledge and models of organizations, leadership, processes, Agile frameworks, transition strategies, etc. It focuses on knowledge acquisition, stopping short of teaching the detailed skills needed to best leverage the knowledge.

Practitioners of EAC typically develop a specialty; however, the level presented in this track builds practitioners who are like your family doctor. They have a wide array of knowledge of what is needed to create and sustain healthy enterprise agility, but are not specialists in every possible area. However, they know enough about the specialty areas to recognize when a referral is needed.

The specialty tracks for the domains of business, technical and transformation are yet to be defined.
Definitions

**Enterprise & Organization**

Enterprise is a business or venture, which may be structured into one or more organizations. An organization is a sub-structure within an enterprise, which have varying degrees of independence. Enterprises may define organizations with more or less inter-dependence based on their structures (e.g. standalone business units vs. functional departments). Enterprise Agile Coaching practitioners tend to work across one or more organizations within an enterprise context.

**Business Agility**

Business Agility is an externally-focused ability of the business to quickly and proactively adapt its goods and services to changing market demands.

**Organizational Agility**

Organizational Agility is an internally-focused broad-scope capability of the organization’s processes, systems, structures, leadership and culture to harness changing environmental conditions in an responsive, adaptive and sustainable way. This is often accomplished through the application of agile principles and practices across one or more organizations.

**Enterprise Agility**

Enterprise Agility is an whole systems ability, encompassing both business and organizational agility, to adapt value stream efficiency in sustainably delivering goods and services in an ever-changing marketplace.

**Enterprise Agile Coaching**

Enterprise Agile Coaching practitioners typically work within an enterprise context, across one or more organizational systems, in support of business goals, guiding increased enterprise agility (organizational agility and business agility) to meet those goals.

**Transition & Transformation**

Transition and Transformation represent two degrees of change. Transition represents a change from one state to another. Transformation represents a significant shift (paradigm or otherwise) from one stage to another. This Enterprise Agile Coaching definition primarily focuses on transition (as the more conservative or neutral concept), but recognizes some practitioners may further specialize in transformational coaching.
1. Enterprise Agile Coaching Skills and Scope

1.1 Theme: The Field of Enterprise Agile Coaching

Duration: 1-2 hours

**LO: What is the field of Enterprise Agile Coaching?**

**Enterprise Agile Coaching** (EAC) is a field that has emerged as Agile implementations have expanded beyond the individual team level to include all manner of organizational challenges. EAC is set of skills, which enable practitioners to catalyze the adaptation and transformation of organizational agility in alignment with the organization’s vision, goals and needs in a turbulent and complex world.

The purpose of this LO is to provide an overview of the Enterprise Agile Coaching (EAC) discipline. EAC is an advanced form of agile coaching that works at an enterprise scale, builds upon the discipline of team coaching and facilitation and draws upon the disciplines of management consulting and Organizational Development (OD). This can include working with organizational structures and culture, developing leaders, building a strong team culture, growing technical practices, change and program management, complex adaptive systems, increasing business agility, etc.

Given its very diverse scope, EAC is not a role per se, but rather a set of skills and competencies that an individual can obtain and leverage in guiding organizations to become more agile. And similar to management consulting or organizational development, people in these fields will not be experts across the entire domain, but rather broadly informed with some specialty(ies), to act as catalysts in guiding change. EAC skills can contribute to practitioners in roles such as Agile Leader, Agile Coach, Agile Sponsor or Agile Champion.

**LO: Understanding Enterprise Agile Coaching Competencies**

Enterprise Agile Coaching is a discipline with broad awareness of business, technical and transformational agility with a deep competence in one or more knowledge areas (e.g. organizational development, culture, change management, technical and enterprise practices, leadership development) and skills such as teaching, mentoring/advising, professional coaching, and facilitating. Why?….to affect organizations at large in moving towards organizational agility.

The purpose of this LO is for the learner to appreciate the breadth of the Enterprise Agile Coaching discipline and its extension from the Facilitation and Agile Coaching Track competencies, including:
Skill sets:

- **Professional Coaching** - proficiency in engaging an organization by skillfully applying foundational professional coaching skills, having developed a strong coaching presence and extending into an awareness of systems coaching.

- **Mentoring & Advising** - broad experience in enterprise agility to be able to effectively mentor and advise at all levels within the organization, especially at the leadership level. Mentoring is growth-oriented while advising is direction-oriented.

- **Facilitating** - proficiency in designing and executing large group and executive work sessions.

- **Teaching** - knowledge of effective design principles to guide the organization in creating an appropriate enterprise education and training program.

Domain knowledge:
The EAC definition provides only a “general practitioner” the breadth of enterprise agile coaching, but does not cover the depth of the specialty domains. However, practitioners applying for the ICAgile Expert designation will be expected to have a strong understanding of the complexity of working across one or more organizations within an enterprise with specialty focus in one of the following areas:

- **Transformational** - Deep focus on systems and complexity theories, organizational dynamics, organizational change and leadership capacity development.

- **Business** - Deep focus on business drivers and performance, business agility, agile processes at scale, agile product development, customer development, business value and metrics, and leadership strategy and vision.

- **Technical** - Deep focus on agile technical and architectural principles and practices, evolutionary design, technical and development operations, tools and practices.
1.2 Theme: Self-Mastery, Professional Development and Ethics

Duration: 2-3 hours

**LO: Striving for Personal and Professional Mastery**

*Enterprise Agile Coaching practitioners model continuous self-improvement with a conscious commitment to deepening their professional competencies and increasing their own level of emotional and leadership maturity.*

The purpose of this LO is to set the expectation that the discipline of Enterprise Agile Coaching constantly evolve, so to then must EAC practitioners evolve their knowledge and develop their own emotional and leadership maturity because they are the instrument of their craft. The implication is that enterprise-level agile coaches work on themselves as much as their knowledge and competencies. EAC practitioners should have a broad awareness and understanding of all the subject areas in this track, and should immerse themselves in one or more of those subject areas. In addition, a highly effective enterprise-level agile coach deep-dives into one specialty area in which to develop true mastery (technical, business or transformational).

**LO: Ethical Considerations of Enterprise Agile Coaching**

*Enterprise Agile Coaching practitioners engage with all levels of the organization to support desired change. Many of the tools and methods used come from several originating professions and require knowledge of their ethical context for proper application.*

The purpose of this LO is to bring consideration of ethical behavior into the development path for Enterprise Agile Coaching. Enterprise Agile Coaching practitioners should be aware of the ethics from the disciplines from which their knowledge and skills are drawn (e.g. professional coaching, professional facilitation, and organizational development).

To be acceptable, learners will discuss real-life scenarios, what can happen when tools/techniques are misused, and the tensions created in upholding these ethics. The ethics provided below can be used to begin that discussion (modified from Oregon Organizational Development Network).

**Responsibility to Self**

- *Act with integrity; be authentic and true to myself.*
- *Strive to continually increase self-knowledge and personal growth.*
- *Recognize personal needs and desires and, when they conflict with other responsibilities, seek win-win solutions to those conflicts.*

**Responsibility for Professional Development and Competence**

- *Strive to achieve and maintain a professional level of competence for both myself and my profession by developing the full range of my own competence and by establishing collegial and cooperative relations with other professionals.*
• Practice within the limits of my competence, culture, and experience in providing services and in using techniques.
• Accept responsibility for the consequences of my acts and make reasonable efforts to ensure that my services are properly used; terminate my services if they are not properly used and do what I can to see that any abuses are corrected.

Responsibility to Client / Sponsor
• Serve the long-term well-being, interests and development of the client system and all its stakeholders, even when the work being done has a short-term focus.
• Deal with conflicts constructively and avoid conflicts of interest as much as possible.
• Define and protect the confidentiality of my client-professional relationships.
• Assert own economic and financial interests in ways that are fair and equitable to me as well as to my client/sponsor and their stakeholders.

Responsibility to People
• Act with sensitivity to the fact that my recommendations and actions may alter the lives and well-being of people within the organizations’ system.
• Act with awareness of the cultural filters which affect my view of the world, respect cultures different from my own, and be sensitive to cross-cultural and multicultural differences and their implications.
• Conduct any professional activity, program or relationship in ways that are honest, responsible, and appropriately open.

LO: Knowing your Own Limits and Boundaries

Enterprise Agile Coaching practitioners work across an enterprise system as a model and guide for harnessing change; as such it’s important for the coach to know their own limits, when to call for support outside their area of expertise, and when to take a stand.

The purpose of this LO is to expose the learner to the need to know not only the limits of their current skills and leadership maturity, but also the boundaries of what they will and will not tolerate and where they will stick to their convictions with regards to agile and other personal values. Knowing one’s own limits leads to opportunities to pair or collaborate with other coaches, which is often essential when working at the enterprise level to adequately (and ethically) serve the client organization. Knowing what you will and will not tolerate in terms of what you consider “good agile” gives the coach a firm ground to stand on in the midst of normal chaos.

To be acceptable, the learning experience should include time for the learner to reflect on these limits and boundaries through an informal self-assessment process.
• Given a scenario in which a coach is challenged beyond their leadership competency, the learner should be able to briefly describe three possible actions that are consistent with emerging ethical considerations within the profession.
• Given a scenario in which Agile principles are being violated, the learner should be able to briefly describe three possible approaches to remedy the situation that are consistent with emerging ethical considerations within the profession.
2. Enterprise & Business Agility

2.1 Theme: Understanding the Whole Value Stream

Duration: 2-3 hours

**LO: Understanding Systems and Complexity Theory**

*Systems thinking, complexity theory and complex adaptive systems are key source sciences underlying Agile process concepts (e.g., self-organization, empirical processes). Understanding systems dynamics within organizations is critical for coaches working at an enterprise level.*

The purpose of this LO is to expose the learner to the field of systems and complexity theory and provide the learner with an awareness of one or more models (e.g. System Dynamics - Peter Senge & Jay Forrester; Complex Adaptive Systems - Glenda Eoyang, Ralph Stacey, et al.; Cynefin - Dave Snowden; Relationship Systems Coaching - CRR Global; Plexus Institute; Eli Goldratt; et al.) and how they help us understand what happens in organizational and human systems. This includes how complex processes work, how agile implementations are aided by such models, and what implications there are for scaling and organizational change.

To be acceptable, the learning experience should include exposure to systems thinking in general and specifically to one or more models of these systems approaches and how it can be leveraged in a enterprise coaching engagement, including applying one or more models in a case study.

**LO: Lean Underpinnings & Mindset**

*Lean thinking is behind the evolution of most Agile processes and provides a context for thinking about customer value and process efficiency across the business. Having a background in basic Lean principles provides a needed context to relate to the business goals and engage at the organizational level.*

The purpose of this LO is to provide the learner with a basic background in Lean thinking, including the Lean philosophy of management (e.g., The Toyota Way), Lean principles (e.g., Poppendieck, Larman, Womack, Reinertsen, etc.) and Lean tools such as value stream mapping, pareto charts, root cause analysis, etc. In addition, differences between product manufacturing vs. design factory processes should be addressed.

To be acceptable, the learning experience should include presentation of Lean principles, practices and philosophy, as well as specific use of such tools in class within an organizational context.
2.2 Theme: Business Agility

Duration: 3-4 hours

**LO: Understanding Business Agility**

*Business agility has become imperative to business success. Current agile product development approaches (e.g., Scrum, XP, and Kanban) cover primarily the technical delivery process and do not provide a sufficient business strategy context and process.*

The purpose of this LO is to provide the learner with an understanding of the importance for the business to be able to adapt its strategy, goods and services to changing market conditions to stay current and meet future performance goals. Applying delivery-focused agile approaches (e.g. Scrum, XP, and Kanban) often fall short of meeting the business needs. Applying current and emerging business agility thinking and models is necessary for coaches engaged at an enterprise level. While many are still emerging, they include; Don Reinertsen’s *Principles of Development Product Flow*, Eric Ries’ *Lean Startup*, and Steve Blank’s customer development. The move to business agility is aided by the successful application of such emerging thinking and models of agility that help with rapid and efficient adaptation to business change.

To be acceptable, the learning experience must include exposure to one or more of these models (or other models yet to come) and how they have been applied in a business environment to more fully realize adaptability in delivering goods and/or services.

**LO: Extending Agility to the Enterprise**

*While agility is often thought of, and applied to, the process of systems application development, agility is most beneficial when applied to the whole enterprise system - including business strategy, product and customer discovery, and end-to-end business flow (i.e., all processes such as sales and marketing, budgeting and finance, operations, delivery and support, etc.)*

The purpose of this LO is to help the practitioner connect and extend business and organizational agility thinking, mindsets, practices, and values to the complex and uncertain enterprise environment. Moving beyond the technical domain and terminology, Enterprise Agile Coaching practitioners need to be able to both apply such thinking to business problems, as well as to craft messages that effectively communicate these approaches to an executive and business audience. The learning experience should include limitations of existing systems like software capitalization, performance reviews, budgeting and finance, portfolio management, release management, production support, etc.

To be acceptable, the learning experience should include a discussion of real-world enterprise processes and structures that support and/or hinder agility, such as finance, customer support, sales, performance management, etc.

Note: Consider this LO to be an overview of whole enterprise agility and the context of the Enterprise Agile Coaching practitioner in working in this whole system. Subsequent learning
objectives address the components of the enterprise system including organizational structures and processes, leadership and culture, and transition.

**LO: Measuring Business Performance with Agility in Mind**

*Traditional performance management metrics may not provide the actionable information that drives adaptive behavior. A critical component when introducing Agile is to help the organization think about how to measure success in a transparent and adaptive way.*

The purpose of this LO is to help the practitioner understand concepts in adaptive measurement, such as focusing on value rather than cost, measuring what’s important to customers (not managers), measuring outcomes rather than activities or outputs, involving the entire team in goal construction and measurement, and preferring leading indicators over lagging ones (see the *Agile Leadership Track* and *Beyond Budgeting* for more details).

To be acceptable, the learning experience should include understanding and applying adaptive measures of business performance to real world situations.

### 3. Organizational Structures and Processes

#### 3.1 Theme: Organization Design and Structure

*Duration: 3-4 hours*

**LO: Awareness of Organizational Structure**

*Organizational structure has a significant impact on organizational performance. It is not merely the layout of the boxes on an org chart, but also everything from job design to the way teams are staffed and impacts how and whether the organization can improve their agility.*

The purpose of this LO is to understand organizational structure variations (e.g. horizontal, vertical, matrix, functional, hierarchy, network) and the different components that comprise them (e.g. reporting relationships/org chart, span of control, job descriptions, team staffing, roles and responsibilities, department structure, governance, and physical and technical office infrastructure). In addition, the learner should understand that the explicit organizational structures may be different from the implicit or informal structure that defines the way work really gets done.

To be acceptable, the learning experience should include analysis and comparison of multiple structures and components and their impact on business performance and agile adoption.
LO: Adaptive Principles and Patterns for Organizational Design

Adaptive/flexible structures can more easily enable organizational agility and can positively impact business performance. Traditional structures prevalent in organizations today often compete with agility. Optimizing the newer, adaptive ways of thinking (including Agile) may require implementing such new structures.

The purpose of the LO is to be exposed to and able to recognize more adaptive organizational design principles and patterns that better handle complexity and enable organizational goals. Adaptive patterns and principles can be applied to any existing organizational design including engaging customers, distributing work evenly to reduce bottlenecks, aligning locations, component vs. feature-based teams, decision making at the lowest possible level, greater degree integration (e.g., across customers, workers, locations, etc.), job descriptions as flexible as possible, definition of policies which enable flexibility, etc. Additionally, some full scale adaptive approaches to organizational structure have emerged including complex adaptive systems (Glenda Eoyang), holacracy, balanced matrix (Robert Cooper), lattice and meshwork organizational structures.

These new, more agile structures require finesse in implementing as they often conflict with the embedded organizational culture. Agile team practices naturally push against traditional structures, making them a key source of organizational structure conflicts. Resolving this conflict effectively requires an agile change management approach (see section 4.2).

To be acceptable, the learning experience should include case study/discussion/shared experiences in successes and failures of applying a few of these principles and patterns across a number of structural elements.

LO: Agile Frameworks for Enterprise Scaling

Applying Agile processes within an enterprise typically requires scaling such processes and structures beyond the individual team or departmental level. At the same time, the risk is creating processes that are overly bureaucratic or cumbersome and no longer agile. (Team Reviewed 5/28/13)

The purpose of this LO is to help the learner understand models for scaling agile processes in a realistic context. Such models include the Scaled Agile Framework (Leffingwell), Larman & Vodde’s patterns for scaling Scrum (LESS), Jutta Eckstein’s work, Disciplined Agile Delivery (Ambler), Alan Shalloway’s work, Scrum of Scrum, and other large-scale patterns. All models have advantages and risks, which need to be considered when applying in an organizational context. To be acceptable, this LO will include a case study of the teacher’s and/or learner’s choosing to which they apply a scaling model, based on appropriate circumstances, organizational characteristics, goals and culture. (Team Reviewed 5/28/13)
3.2 Theme: Organizational Processes and Improvement

Duration: 2-4 hours

**LO: Understanding Business Processes and their Impact**

*Business processes run organizations and have a significant impact on business performance. Business processes aligned with agile principles generally create greater value flow, higher job satisfaction, clearer roles and more satisfying relationships between people.*

The purpose of this LO is to understand what business processes are (e.g., Product Development, Customer Fulfillment, Performance Management, Finance, Software Capitalization, SDLC, etc.) and how to work with them. Business processes have a large impact on business performance, and can be neutral, enable or hinder overall organizational agility. More adaptive business processes express agile principles such as end-to-end value flow, having a clear customer, and eliminating waste. Less adaptive business processes often have many handoffs, steps or products with no downstream customer, high degree of waste, and big design up front.

To be acceptable, the learner can analyze components of a business process, discern their adherence to the principles of agility, and identify their impacts on the business.

**LO: Agile Business Process Improvement**

*Traditional process improvement tended to leverage a mechanical approach with top-down decision making. Agile process improvement expresses the principles of agility through engaging people, visualizing work and making improvements adaptively and incrementally.*

The purpose of this LO is to ensure that the learner infuses business process improvement with agile approaches and supporting tools. An agile approach is a collaborative, iterative and feedback-rich style of process improvement, where the people closest to the process are engaged in the improvement and continued refinement. Supporting tools for visualizing, assessing, and prioritizing which business processes to change include Lean Tools (ex. Value Stream Mapping, Theory of Constraints, Kanban), Six Sigma Tools (ex. SIPOC), business process mapping and simulation and many more that are constantly being invented (ex. Mikado).

To be acceptable, the learner can identify the key agile principles that apply to process improvement and understand how to use one tool that aids process improvement discovery
4. Leadership and Culture

4.1 Theme: Working with Leaders
Duration: 4-6 hours

**LO: Understanding and Working with Executive Teams**

Practitioners of Enterprise Agile Coaching need to engage executive teams, whether as coach, adviser, facilitator or teacher. The term “executive team” is sometimes an oxymoron, yet most organizational issues are complex, cross-departmental and require collaborative team methods to resolve.

The purpose of this LO is to introduce the learner to ways of helping leadership teams be more effective, enabling a culture consistent with agile principles. First, it is important to understand that executives are short on time and long on power. Special considerations in working with them include understanding and addressing the power dynamic between you and them, consciously designing the physical and emotional space of sessions to maximize engagement, and working with the executive mindset (e.g. an intense focus on results leading to impatience, short attention span, going off on tangents, their need to be heard, and a potential sensitivity with vulnerability).

It is also important to understand the executive team context and the group’s status either as a team or as a collection of individuals. Executive teams often use assessments (Five Dysfunctions of a Team, Team Diagnostic Assessment (TDA), Myers-Briggs (MBTI), or DISC) that reveal team dynamics and collaboration issues. These models can be helpful in engaging leaders through change. In addition, introducing certain collaborative practices to help them solve problems can also be useful, for instance leveraging agile principles and practices (e.g. timeboxing conversations, short iteration-length goals, pairing, addressing topics in business value order, etc.).

**LO: Understanding Executive Coaching vs Advising**

Effective enterprise agile coaching balances expertise as a teacher and mentor with guiding client self-discovery as a professional coach and facilitator. Understanding this difference, and assessing which is most useful, is essential for effective enterprise agile coaching.

The purpose of this LO is to expose the learner to two approaches to working with executives: coaching and advising. The field of professional executive coaching (e.g. Newfield, Co-Active, NeuroLeadership, etc.) can support an executive as they make the personal and professional changes needed to truly support the agile change initiative. Alternately, advising executives can also be effective in areas where one has expertise, and where the client is open to such information. To be acceptable, the learning experience should include discussion of the differences, uses and limits of both executive coaching and advising approaches. 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 skill.

An exercise should engage the learner through such things as having experience in creating a development plan for a real leader and/or practice a 1-on-1 conversation with a leader (real or role-play) that takes an advisory, coaching, or mixed approach.

**LO: Understanding Leadership Development**

*Organizational agility is limited by the maturity level of leadership at all levels within the organization. When organizational 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. (The same is true on a micro-level within a team’s leadership, though that is not the primary focus of this LO.)*

The purpose of this LO is for the learner to understand one or more research-based approaches to how leaders develop or become more mature (i.e., the field of leadership development). Example approaches include the research-based approaches of Joiner & Josephs’ *Leadership Agility*; Bob Anderson’s *The Leadership Circle 360*; various EQ Assessment tools; as well as others.

Enterprise Agile Coaching, in the context of working with leaders, is highly informed by an awareness of the impact leadership maturity has on organizational agility. Like culture, the level of maturity in the leadership environment provides an enabler or constraint on the degree of organizational agility possible. To be acceptable, the learner can describe a scenario in which leadership development impacted the success of an agile transformation, applying a model of leadership development to help support their conclusion and inform what action could be taken (e.g., a leadership development plan, adjusting expectations for what is possible, etc.). As an optional but recommended practice, the learner could take a leadership assessment for themselves (e.g, a 360 assessment) to understand their own leadership maturity.

**4.2 Theme: Organizational Culture and Alignment**

*Duration: 3-4 hours*

**LO: Understanding Organizational Culture**

*Organizational culture can be described as “the way things are done in order to succeed” (William Schneider). It has an overriding impact on agile’s ability to survive or thrive throughout an enterprise.*

The purpose of this LO is to introduce the learner to one or more models of organizational culture (ie. William Schneider’s CultureTEK, Edgar Schein’s Model, Tribal Leadership, Spiral Dynamics, Competing Values Framework) and be able to use a model to help the organization assess its culture, its alignment to agile values, and the desired future-state culture.

Enterprise Agile Coaching serves agile AND the organization in a dynamic tension. In doing so,
it requires attention to both the organizational culture and its alignment with agility. One should be wary of cultural change through agile as an end-goal, as research indicates culture change is difficult and takes years. For this reason, the agile transformation strategy should work with the current culture while informing/evoking the desired culture.

To be acceptable, the learning experience should include how to assess an organization’s culture, assess the degree of alignment of that culture to the agile principles and values, and to reveal the implications.

**LO: Engaging Leadership in Conversation about Culture**

*Culture is often hidden. Being deliberate about the culture and agile and how they mutually impact each other is crucial.*

The purpose of this LO is to understand leadership’s impact on culture and engaging them in making organization culture-aware decisions that guide the agile transformation. The organization’s culture should be revealed and considered, 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.

Given the above, responsible leaders will want to make informed decisions when installing the “agile culture” in an organization given their organization’s culture, while understanding the implications in doing so. There is not one answer or clear path, per se, just choices that ought to be made deliberately. Tools in helping make these choices include Argyris’ Double/Triple-Loop Learning and Senge’s Learning Organization. To be acceptable, the learning experience should include examples or shared experiences of how culture impacted an agile transformation.

### 4.3 Theme: Developing an Agile Team Culture

**Duration: 4-6 hours**

**LO: Health and Sustainability of Agile Teams and Agile Processes**

*An agile ecosystem is in constant flux. Being “good” one day does not imply that it will be “good” in the future. In addition, one team’s successes and health does not guarantee another’s. Agile teams are constantly assessing their own health, working across the organization to leverage learning from other teams and adapting to sustain their health over time.*

The purpose of this LO is to help the learner understand the practices to developing and sustaining a healthy team culture across the organization. A healthy team culture is an internal measure of performance which should lead to external business results - it is a means to an end. And given the constantly changing and complex organizational environment, it should be a frequent and regular focus.
Enterprise Agile Coaching guides the organization in healthy team culture development through developing and executing various ceremonies, practices and events. These include Agile practice and team assessments (e.g., “health checks”), sprint and project retrospectives, communities of practice and shared learning events. The learner should also be aware of the impact that other organizational variables can have on team performance like shared team goals, performance reviews, 360 assessments, etc.

The importance is not any one approach, but rather the integration and diversity of approaches built into the organizational structure and culture which drive sustained health. Regarding the use of any of the approaches, it is helpful to differentiate between a checklist mentality (“empty rituals”) vs. a deeper, more values- or purpose-driven approach. The learner should bias toward team self-analysis and learning over comparing team performance.

To be acceptable, the learner should be able to identify the approaches to sustaining a healthy team culture and know the pitfalls that could emerge from their misuse.

**LO: Enabling Technical Craftsmanship in the Team Culture**

*Mastering technical and quality practices -- as exemplified by the software craftsmanship movement -- are a central method to elevate agile team performance and overall organizational performance.*

The purpose of this LO to expose the learner to software craftsmanship and other related practices (e.g. Extreme Programming, Lean) so that they can help the organization with their technical maturity and use of practices, and elevate these practices enterprise-wide to foster a mindset of consistent delivery, quality and flow. Technical practices are fairly well known, understood and documented elsewhere (thus not to be repeated here).

Enterprise Agile Coaching does not require the coach to be an expert in software craftsmanship per se, but they need to know enough to help the organization achieve greater business performance through successfully using technical practices, to understand what drives management to value such a craftsmanship culture, and to recognize that technical agility can be a doorway to agile transformation in some organizational cultures.

This LO is written from a software development perspective. The learner should be aware that technical craftsmanship is simply a form of mastery for their discipline and can be applied to other domains across the organization.

**LO: Application: Integrating Leadership, Culture and Teams**

*Having models helps us understand leadership maturity, organizational culture and ways to assess the health of teams. It is essential to apply these insights for diagnosis, strategy and action in realistic organizational settings.*

The purpose of this LO is to help learners apply the understanding they have gained about leadership development models, organizational culture models and team health assessments.
The learner should be provided a case study of an organization transforming to an agile organization. The case study should expose challenges the organization is facing at the team, leadership and cultural level. Specifically, the case should:

- provide examples of a specific type (or a mixed type) of organization culture, that is classifiable in terms of the culture model that has been taught
- provide examples of specific leadership behaviors from various leaders, classifiable in terms of the leadership development model that has been taught
- describe a situation that covers the state of team health (e.g., agile adoption level, team dynamics, technical craftsmanship, etc.) in a way that leaves a gap or something to aspire towards

The learner should then be asked to analyze the case study and answer two fundamental questions:

- What is your analysis of the kind of culture, the level of leadership development and the nature of healthy teams in this case?
- What strategies or actions would you take to help the client: a) be realistic about their adoption or transformation goals given their reality, b) strive for the highest level of functioning consistent with what the organization needs, and c) identify structures or mechanisms (e.g. change team, leadership coaching, coaching circles, cultural and/or leadership assessments, team assessments) that would support their needs at a pace they can sustain.

5. Change and Agile Transitions

5.1 Theme: Organization and Human Change Processes

Duration: 6-8 hours

**LO: Creating a Business Case for Change**

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

The purpose of this LO is to expose the learner to the importance of the 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 business people can understand. Even the most purely technical initiatives (i.e. upgrading data centers) have business benefits that can be articulated. Further, 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 “customer satisfaction will go up on agile teams”), so that the overall change sponsor understands what they will achieve through agility and that it justifies the organization’s investment. As we know the future cannot be predicted, the business case needs to be updated
frequently to match the new reality, and reported transparently as to results achieved (or not achieved).

To be acceptable, the learning experience should include discussions of case studies where a business case was IT-driven vs. when it was a partnership with business people and made in business terms.

**LO: Understanding the Human Change Process**

Any change within an organization has at least two aspects, the tangible change (whether technical, business or organizational), and the human reaction to that change. To effect real change requires more than driving through a list of “change management” to-do’s, but also helping people understand what it means to them and move through their own internal change process to successfully adapt to the change.

The purpose of this LO is to introduce the learner to one or more models of the human change process (e.g., Arnold Mindell’s Edge Theory, Kubler-Ross, Virginia Satir Change Model, David Rock’s SCARF Model and Neuroleadership) and be able to use model(s) to help people know that what they’re experiencing is normal and to work through the changes in themselves that agile instigates.

**LO: Understanding the 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 transition.

The purpose of this LO is to introduce the learner to one or more models for organizational change (ie. John Kotter - Leading Change, Appreciative Inquiry, Arnold Mindell’s Edge Theory, Prosci’s ADKAR, Darryl Conner, William Bridges) and to be able to develop a tailored and intentional process that engages the whole system in the change (e.g., process, business, technology, culture, leadership capabilities, power relationships, etc.).

To be acceptable, the learning experience should include a case study of organizational change and how one or more of the model(s) applies (e.g. team structures, departmental, technology “only”, perceived positive and negative change, etc.)

**LO: Bringing the Agile Mindset to Change**

Agile brings about a mindset shift from “change as an exception” to “change as a norm”. This 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.

The purpose of this LO is to ensure that the change process(es) employed do not get used in a traditional top-down, phase-gate, or check-off-the-Gantt-chart way. Instead, the agile values and
mindset are instilled throughout the entire change process, at both an individual and organizational level. Examples of this agile mindset include: incorporating inspect-and-adapt throughout, creation through collaboration, working with “what’s trying to happen” in the whole organization rather than forcing “what I want to happen”, and the belief that change is a continuous process rather than an event.

To be acceptable, the course would include an engagement of the learner in a thought process or discussion about how to apply individual and organizational change processes while upholding the agile mindset. The discussion should highlight the natural tension between what the coach wants and what the organization can “metabolize.”

5.2 Theme: Agile Transition and Transformation Change Strategies

Duration: 8-12 hours

**LO: Understanding Organization Systems Entry**

*Enterprise agile coaching has roots in organization development (OD) interventions. Borrowing from OD, the first step in such an engagement is systems entry, which culminates when there is a shared understanding of the goals and objectives of an engagement and agreement on how to proceed.*

The purpose of this LO is to understand the importance and characteristics of systems entry in establishing an effective agile coaching relationship with an organization. Systems entry includes understanding what the client is trying to accomplish, who the client is, what the scope of the work entails, identifying the target system elements through conducting an organizational assessment (see related LO below), creating a positive relationship with the system as a whole through mutually trusting relationships between the coach and the individuals and groups that will be part of the coaching; all eventuating in a coaching contract or alliance (which includes boundaries, roles, durations, expectations, goals, etc.).

To be acceptable, the learning experience should include one or more examples of a complete systems entry process from initial contact to coaching agreement.

**LO: Components and Considerations of Organizational Assessments**

*Assessments are an early step in any change program. They support increased awareness and understanding of the current state and are used to inform a realistic change intervention.*

The purpose of this LO is to understand 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, change readiness, and business goals of the change. The *modalities* may include interviews (individual or team), surveys, large group methods, observation, orientation training, etc. Finally, the overall assessment process typically includes a kickoff, conducting the assessment, and the recommendations and debrief (written and/or oral) of the results, balancing
organizational self-assessment with expert opinion. This process is an input to the eventual change strategy chosen, and may inform or update the results of systems entry.

**LO: Co-Creating an Organizational Change Strategy**

Successfully increasing organizational agility requires some degree of organization change, and a well-thought-out change strategy. The change may be seen as an adoption, a transition, or a transformation. Guiding leaders, from both technical and business/product management functions, in developing their change strategy is critical for a change process to be effective.

The purpose of this LO is to expose the learner to approaches for creating an organizational change strategy, in part based on the assessment. An effective approach should leverage agile principles such as co-creation through collaboration, incremental change, transparency, fast feedback, and frequent inspect and adapt cycles. In addition, it should take into consideration that psychological transition happens at different paces for different people and groups, and an overall change process in an organization may take many years.

The change strategy should answer process-related questions such as: How do we approach different target “systems” (technical, process, business or organizational)? What is the internal capacity and capability to absorb the change? How will the change goals be measured and what constitutes success? What education and/or coaching is needed and where? Who owns the change process? Who will be on the change team (both technical and business stakeholders are crucial)? How will the change team prioritize change opportunities make decisions? How will the change be sustained?

The elements of a change strategy should include an approach to communication, to training, to understanding and influencing stakeholders, and a rollout and execution strategy. The strategy should be informed by known adoption and scalability patterns for Agile transitions.

To be acceptable, the learning experience should include review and discussion of multiple change strategies based on differing organizational contexts, needs and readiness.

**LO: Application: Conducting Assessments, Designing Strategy and Contracting for Change**

The change strategy and its various components, including organizational assessment, strategy development and coaching alliance with the organization to implement the strategy, provide a necessary foundation to the success of an agile transition initiative. The organizational assessment sets the stage for a productive agile engagement, the change strategy (informed by the assessment) defines a structured and intentional implementation approach, while the coaching alliance defines a clear set of expectations for the change process and the relationship between the agile coach and the various stakeholders in the organization. All three of these inform each other.
This LO is broken into three sub-learning objectives to provide practice for each of the components of a strategy including: a) the organizational assessment, b) the change strategy itself and c) a coaching alliance. (Note to course designers: you may wish to design this as one case study combined, or conduct each exercise separately as the material is covered during your course.)

a) The purpose of this portion of the LO is to provide the learner with an opportunity to tailor the components of an organizational assessment to a real-life scenario, using either a course case study or a student’s organizational situation, then getting feedback from others on the design. The exercise should include defining the dimensions to be assessed and the specific questions to be addressed, the modalities to be used, and how the assessment debrief will be handled.

b) The purpose of this portion of the LO is to give the learner practice in designing the change strategy based on information gathered from the assessment. The exercise should be structured so the learner completes at least a portion of all elements of a change strategy, including: a stakeholder analysis, communications approach, training approach, stakeholder influence strategies, adoption/rollout strategy and overall coaching approach. The output of this activity may take multiple forms including an agility backlog, a roadmap, vision documents, written plans, etc.

c) The purpose of this portion of the LO is to give the learner practice creating a coaching alliance within a particular set of real-life circumstances. This application builds on the learning at the Agile Coach level, specifically the LOs: What is a coaching “contract” and How to Design a Coaching Alliance. The exercise should be structured so the learner completes all elements of either a coaching alliance, including boundaries, roles, durations, expectations, goals.

To be acceptable, the learner will determine the target system to create an alliance with, keeping in mind that this may entail multiple levels, multiple teams or departments and stakeholders representing different aspects of the organizational transformation.

5.3 Theme: Working with Organizational Impediments
Duration: 1-2 hours

LO: Understanding Organizational Impediments
Organizational impediments are often revealed during change. At an enterprise level, impediments are magnified in the cost and scope of their impact. Frequent complaints, challenges or less than desired outcomes are often indications of larger/deeper organizational impediments that need to be exposed and addressed in the change strategy over compromising agility.

The purpose of this LO is to raise awareness that organizational impediments are often deep within the organization itself and impact the organization across many dimensions. Awareness
of the 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, or business drivers for change, lack of product visioning, or organizational visioning, etc. Structural impediments may include roles and responsibilities, departments, locations, physical or technical infrastructure, performance measures and rewards, compliance and financial controls. Cultural impediments may include leadership values and principles, collaboration and competition, team vs. individual drivers, process richness, focus on deadlines over all else, etc. Educational impediments may include understanding of new roles, processes, structures and leadership competencies to drive an effective agile approach.

Scaling agile impacts organizations in a non-linear fashion, increasing the number of and magnitude of the impediments. Therefore, it is important to separate the symptoms exposed by such impediments from underlying root causes and more fundamental issues. An Enterprise Agile Coach must be well versed across these dimensions to be an effective change agent.

**LO: Identifying and Addressing Organizational Impediments**

Agile is not a one-time change, rather it is an ongoing process requiring continuous inspection and adaptation. Any process of dealing with impediments must accommodate a regular reflection and action approach, with a realistic assessment of the organizational change capacity.

The purpose of this LO is to introduce the learner to effective and sustainable approaches to dealing with organizational impediments and change. It is important to know when it is appropriate to adapt the agile implementation to move forward vs. when to “stop the line” and address the impediment.

One approach for dealing with impediments is to create an organizational agility team which uses agile to be agile. This team collects a backlog of organizational impediments and uses an iterative approach to focus on and address the most pressing ones. Regardless of the method used, Agile principles of cross-functional team-based problem solving, visualizing work and results, close engagement with stakeholders, incremental change, measuring results, and constant feedback are critical in sustaining the pace of change.

To be acceptable, the learner should be exposed to realistic examples of organizational impediments in a wide variety of contexts and discuss approaches to addressing them with other learners. Key points should be that these impediments are typically complex, take time and require multiple stakeholders to address the needed changes to overcome the impediment, which might include tweaking a process or structure, creating wholesale change, or living with the impediment as is.
5.4 Theme: Communicating, Educating and Facilitating for Organizational Change

Time: 6-8 hours

**LO: 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 to it to their work lives. In addition, the goal of communicating across the organization should be to establish a two-way communication process.

The purpose of this LO is to connect the Enterprise Agile Coaching practitioner to the communications aspects of the change management process. A communication strategy and execution plan provides a clear pathway for people in the organization to know what is expected, what to do, and a way to provide feedback. While the coach may not lead the communication strategy, or execute the communication plan, per se, they need to help the client with this process, including providing input. Any communication approach should consider the target audiences, key talking points/messages, and delivery mechanisms (e.g. all hands, newsletters, internal social networking, etc.). In keeping with Agile principles, transparency of communication and frequent updating of any communication “plan” and progress is recommended.

To be acceptable, the learning experience should include a sample communication plan and should emphasize the complexity of change and human transition and the importance of frequent and bite-sized communication to guide groups of people towards a new normal.

**LO: Educating at an Organizational Level**

Given the fundamental mindset shifts Agile provokes, education is essential to empower people to do their work differently and allows them to meaningfully contribute throughout the agile change process. A broad-based education strategy also magnifies the impact of coaching.

The purpose of this LO is to foster a collaborative and cohesive approach to cross-functional agile learning to aid the agile transition. While the coach may or may not be the primary educator for the organization, they at a minimum need to be able to help design and coordinate the execution of education across the organization. Creating an organizational education approach requires understanding the different audiences to be trained, the skill gaps that are exposed by the change, the training options available, and the measure of success. Training typically includes general agile training, business agile training, specific technical training, and agile leadership training (team and organizational leadership). The Enterprise Agile Coaching practitioner should be aware of the importance of using agile principles in the training, such as collaborative learning approaches that bring together multiple parts of the organization (rather than merely one function). In addition, such learning does not only occur in formal classroom settings, but is also enabled through a regular reflective agile process and should be reinforced through coaching.
To be acceptable, the learning experience should include a discussion of various organizational education approaches, or the lack thereof, and how they impacted the organization as a whole, both positively and negatively.

**LO: Awareness of Large Group Facilitation Methods**

*Change is more sustainable when people are engaged in the change process, including across organizational boundaries. This requires work be done in large groups, where people can share ownership in the change and become advocates.*

The purpose of this LO is to expose the learner to multiple large group facilitation methods (e.g. Open Space, Deep Democracy Process, Future Search, World Cafe, GE Workout, Rod Collins' Work-thru, etc.) and other advanced facilitation techniques such as visual facilitation, games, and simulations. These methods provide groups with access to alternative modalities and channels (e.g., visual rather than verbal, silent work, etc.) to elicit new ways of thinking about an idea or topic. The advantage of large group methods is to fully engage people in the change process, through revealing diverse viewpoints, exposing and working with conflict, and helping people rise to the challenge through peer-to-peer working relationships rather than manager-to-employee.

To be acceptable, the learning session should utilize at least one of these methods.

**LO: Facilitating at an Organizational Level**

*Engaging varied large groups and people at an executive level within an enterprise context requires more consideration and planning than team-level facilitation due both to the time and dollars invested, as well as the more complex group dynamics involved.*

The purpose of this LO is to expose the learner to the depth and breadth required in designing, constructing and facilitating a large group method in an enterprise context. Designing effective large group processes will often require working with a design team that includes organizational stakeholders that share ownership. Design considerations include methods for getting the whole system in the room, the need to evaluate tradeoffs of many small sessions vs. one or two large ones, and when to use a small number of representatives for each function/level vs. a general invitation to anyone who wishes to come. When facilitating larger groups across multiple sessions, additional considerations may include how to work across various leadership levels, determining the scope of conversation and decision making for each session, the relationship of outputs from earlier sessions to later sessions as inputs, etc.

Engaging and facilitating executive and management groups requires additional considerations related to their mindset and short attention span. Much of this was covered in the Working with Executive Teams LO.

To be acceptable, the learner would create a facilitator guide for a real-life example event(s) that applies some of the methods covered previously into an effective design. The learner should receive feedback on the strengths and challenges of their design.