Agility in the Enterprise Learning Outcomes

IC Agile ®
International Consortium for Agile

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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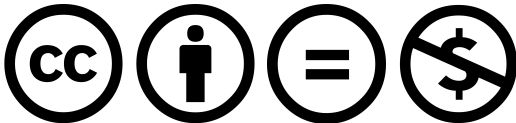
SPECIAL THANKS

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CONTENTS

HOW TO READ THIS DOCUMENT

This document outlines the Learning Outcomes that must be addressed by accredited training organizations intending to offer ICAgile's Agility in the Enterprise 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. ENTERPRISE AND BUSINESS AGILITY

1.1. UNDERSTANDING THE WHOLE VALUE STREAM

1.1.1. 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.

Explain 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.

1.1.2. 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.

Explain the basics of 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 and design factory processes should be addressed.

1.2. BUSINESS AGILITY

1.2.1. Understanding Business Agility

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

Explain the importance for the business to be able to adapt its strategy, goods and services to changing market conditions in order 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.

1.2.2. Extending Agility to the Enterprise

While agility is often thought of as 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.)

Analyze, categorize, 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 (ECA) 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. Explain the limitations of existing systems like software capitalization, performance reviews, budgeting and finance, portfolio management, release management, production support, etc.

1.2.3. 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.

Appraise 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).

2. ORGANIZATIONAL STRUCTURES AND PROCESSES

2.1. ORGANIZATION DESIGN AND STRUCTURE

2.1.1. 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. It impacts how and whether the organization can improve their agility.

Explain 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). Show how the explicit organizational structures may be different from the implicit or informal structure that defines the way work really gets done.

2.1.2. 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.

Identify and categorize 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).

2.1.3. 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, there is a risk of creating processes that are overly bureaucratic or cumbersome and no longer Agile.

Explain 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 Scrums and other large-scale patterns. All models have advantages and risks, which need to be considered when applying in an organizational context.

2.2. ORGANIZATIONAL PROCESSES AND IMPROVEMENT

2.2.1. Understanding Business Processes and Their Impact

Business processes run organizations and they 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.

Explain 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.

2.2.2. 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.

Show how to infuse 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 (e.g., 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).

3. LEADERSHIP AND CULTURE

3.1. WORKING WITH LEADERS

3.1.1. Understanding and Working with Executive Teams

Practitioners of ECA 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.

Explain 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 and more.

ECA, 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.

3.1.2. Understanding Executive Coaching vs. Advising

Effective ECA balances expertise as a teacher/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 ECA.

Categorize and contrast the different approaches to coaching 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. Discuss 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.

3.1.3. 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.)

Introduce 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.

3.2. ORGANIZATIONAL CULTURE AND ALIGNMENT

3.2.1. 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.

Explain one or more models of organizational culture (i.e., 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.

ECA 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.

3.2.2. Engaging Leadership in Conversation about Culture

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

Explain leadership's impact on culture and engage 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.

3.3. DEVELOPING AN AGILE TEAM CULTURE

3.3.1. 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.

Explain practices for 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. Given the constantly changing and complex organizational environment, it should be a frequent and regular focus.

ECA guides the organization in healthy team culture development through developing and executing various ceremonies, practices and events. These include Agile practice and team assessments ("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 value or purpose-driven approach. The learner should bias toward team self-analysis and learning over comparing team performance.

3.3.2. 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.

Explain 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).

ECA 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.]