

Coaching Agile Transitions Learning Outcomes



LICENSING INFORMATION

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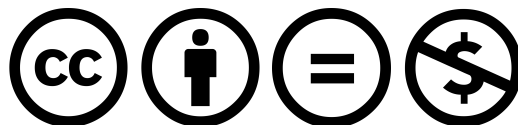
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HOW TO READ THIS DOCUMENT

This document outlines the Learning Outcomes that must be addressed by accredited training organizations intending to offer ICAgile certifications for each step in the Enterprise Agile Coaching Track.

Each LO follows a particular pattern, described below.

0.0.0. Learning Objective 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 COACHING SKILLS AND SCOPE

1.1. THE FIELD OF ENTERPRISE COACHING FOR AGILITY

1.1.1. What is the field of ECA?

Enterprise Coaching for Agility (ECA) is a field that has emerged as Agile implementations have expanded beyond the individual team level to include all manner of organizational challenges. ECA is a 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.

Classify and explain the ECA discipline. ECA 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, ECA 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. 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. ECA skills can contribute to practitioners in roles such as Agile Leader, Agile Coach, Agile Sponsor or Agile Champion.

1.1.2. Understanding ECA Competencies

ECA 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.

Identify the breadth of the ECA 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 ECA definition provides only a “general practitioner” the breadth of ECA, 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. SELF-MASTERY, PROFESSIONAL DEVELOPMENT AND ETHICS

1.2.1. Striving for Personal and Professional Mastery

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

Show that the discipline of ECA constantly evolves. ECA practitioners must also 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. ECA 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.)

1.2.2. Ethical Considerations of ECA

ECA 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.

Understand and explain the need for ethical behavior in the development path for ECA. ECA 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).

1.2.3. Knowing Your Own Limits and Boundaries

ECA practitioners work across an enterprise system as a model and guide for harnessing change; as such, it is 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.

Identify and explain 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.

2. CHANGE AND AGILE TRANSITIONS

2.1. ORGANIZATION AND HUMAN CHANGE PROCESSES

2.1.1. 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.

Explain 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).

2.1.2. 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.

Explain 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.

2.1.3. 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.

Explain one or more models for organizational change (i.e., 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.).

2.1.4. 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.

Demonstrate ensure that the change process(es) employed should 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.

2.2. AGILE TRANSITION AND TRANSFORMATION CHANGE STRATEGIES

2.2.1. Understanding Organization Systems Entry

ECA 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.

Explain 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.).

2.2.2. 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.

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, 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.

2.2.3. 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.

Explain a variety of 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.

2.2.4. 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) 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) Practice designing a 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) 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.

2.3. WORKING WITH ORGANIZATIONAL IMPEDIMENTS

2.3.1. Understanding, Identifying and Addressing 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.

Recognize and explain 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.

2.4. COMMUNICATING, EDUCATING AND FACILITATING FOR ORGANIZATIONAL CHANGE

2.4.1. 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.

Explain how the ECA practitioner can connect 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.

2.4.2. 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.

Apply and encourage 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 ECA 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.

2.4.3. 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.

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.

2.4.4. 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.

Explain 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.