Leading in a Self-Organizing World: An Operating System for Agile Leaders

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Speaker

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Author:

Great Big Agile: An OS for Agile Leaders
And
The Guide to CMMI and Scrum
PART I: Leading in a Self-Organizing World
Gallup polls of U.S. adults over that period asked “how much confidence you, yourself, have in each” of the following. The results below were the combined percentage of those answering a “great deal” or “quite a lot”.

**COMMUNITY**

**The church or organized religion**

- Organized religion was once one of the most trusted institutions.
- Now fewer than half of adults trust organized religion.

**ECONOMY**

**Banks**

- Banks had a **27 percentage-point drop** from 2006 to 2009, as the economy was hit by a recession and struggled to recover.

- 60%
- 27%
Survey methods varied over time, with the latest poll conducted June 1-5, 2016, among 1,027 adults reached through a random national sample of cellular and landline phones. The margin of sampling error is plus or minus four percentage points. Surveys from 1989 through 2015 were conducted by telephone, while surveys from 1973 through 1988 were conducted face to face.

Source: Gallup Organization
Survey methods varied over time, with the latest poll conducted June 1-5, 2016, among 1,027 adults reached through a random national sample of cellular and landline phones. The margin of sampling error is plus or minus four percentage points. Surveys from 1989 through 2015 were conducted by telephone, while surveys from 1973 through 1988 were conducted face to face.

Source: Gallup Organization
My Own Journey to **Agility** and **Self-Organization**

The “burning platform” wasn’t wanting to be AGILE,

It was TIME!

I needed to focus on strategy, but I was buried in operations
Rule #1:

Everyone is asking how to scale Agile

It’s the wrong question

We should be asking how to scale Self-Organization
Rule #2:

Successful self-organization requires strong Leadership

Just not the kind we’re used to
We Started with Open Spaces
Roles and Accountabilities*

- Self-organized organizational chart!
- Each role is identified by the team
- Roles are clustered around "Circles"

*Holacracy © 2005 Brian Robertson
Roles and Accountabilities

- Self-organized organizational chart!
- Team members self-subscribe to roles
- Dedicated governance roles
Workshop Facilitator

Purpose

To deliver specific content in a workshop format

Accountabilities

- Learning Workshop Content
- Planning Workshops
- Contacting client in advance to explain the workshop
- Communicating to Account Consultant on prep, intro, and follow-up
- Scheduling workshop with client and Consulting Coordinator
- Preparing Workshop materials
- Delivering workshop materials
- Conducting workshops
- Submitting attendee information to Bitrix task
- Updating and closing tasks in Bitrix
- Storing delivered content in Bitrix
- Maintaining health of Bitrix folder for each account by ensuring that all Workshop files are complete and align with naming standard listed in register
The Ability Models 1: Why-Ability

Management Policies (including Agile Values) tell us “WHY”

- To work here you must follow the process
- To ensure on-time delivery, all team members will conform to plans
- To order to have high-quality, 100% of code is unit tested
- Teams will adopt methods that support transparency, collaboration, and fail fast” so we can be more agile.

These are “Why-Ability” Models. They masquerade as a total solution, but they’re not enough.
The Ability Models 2: What-Ability

Methods, Processes, and Frameworks tell us “WHAT”

- Capability Maturity Model Integration (CMMI) and its 356 practices
- PMBOK
- ISO 9001
- ITIL
- Test Maturity Model Integration (TMMI)
- SAFe

These are “What-Ability” Models. They also masquerade as a solution, and they’re not enough.
The Ability Models 3: How-Ability

Behavioral Models tell us HOW:

- Holacracy
- Agile values + Scrum
- Agile values + XP

These are “How-Ability” Models. These describe how we want people to behave – and are a large part of the solution.

WE NEEDED ALL THREE!
All-Ability: The Agile Performance Holarchy
Leading

- Enabling
- Valuing
- Visioning
- Engaging
As an agile leader

I will project agile values, provide the environment, and establish a vision so that my teams can be agile and successful in everything they do.
Making Self-Organization Real: Values

Select and Define
Communicate
Deploy
Align
Maintain
Values: Select and Define

**CEREMONIES // TECHNIQUES**

**OPEN SPACE TECHNOLOGY**
Use the Open Spaces event for purpose-driven visioning and involve as many team members as possible in the selection and definition of agile values.

**BRAINSTORMING**
Structured Brainstorming sessions can be used as a simplified alternative to Open Spaces events to collaborate with team members in the selection and definition of agile values.

**MINDMAPPING**
MindMapping can be used as part of an Open Spaces event, or during Structured Brainstorming to help facilitate complex interdependencies.

**VALUE TRACING**
Value Tracing ensures that each value is traced directly to the set of frameworks, techniques, and behaviors that are adopted by teams.
Values: Communicate

CEREMONIES // TECHNIQUES

OBEYA ROOMS
Set up an Obeya Room to visually anchor and communicate agile values in a visible and transparent way. More than one Values Obeya Room can exist if multiple sites are being used, or if there are slight variations in values by location, function, or product line.

VISUAL INFORMATION MANAGEMENT
Visual Information Management techniques, which involve the use of outsized signs, boards, and digital medium through each facility, can be used as a constant reminder of the most important values.

GEMBA WALKS
Engage with team to reinforce leadership’s understanding of, and passion for, agile values by conducting regular Gemba Walks. Leaders can see for themselves how well agile teams understand the selected values, and can discuss their importance in real-time, providing coaching where needed. The regular presence of leaders in the area where work gets done will lead to a significant change in behavior.
Values: Deploy

CEREMONIES // TECHNIQUES

OBEYA ROOMS
Use an Agile Values Obeya Room to deploy agile values in a visible and transparent way. More than one Values Obeya Room can exist if multiple sites are used to do work.

CEMBA WALKS
Engage with teams to understand how well they understand the agile values. Ask questions and give feedback and coaching where needed to foster learning, but do not focus on compliance.

TEAM CHARTERING/TEAM AGREEMENTS
Agile values should be defined at the beginning of all Team Charters/Agreements, to encourage team members to self-subscribe to them, and understand how they relate to everyday work.
Values: Align

**CEREMONIES // TECHNIQUES**

**Gemba Walks**
Leaders should see for themselves how aligned teams are to the established set of values. They can ask questions and give real-time feedback and coaching where needed to foster alignment.

**Enterprise Retrospectives**
Conduct values-based Retrospectives in the Obeya Room, or with individual teams, to gather feedback on what is working well, what is not working well, and what could be improved related to agile values.

**MindMapping**
MindMapping can be used as part of an Open Spaces event, or during Structured Brainstorming to help facilitate complex interdependencies.

**Enterprise Impediment Backlog**
Place impediments and improvements generated by values Retrospectives on the Enterprise Impediment Backlog Board to ensure visibility and transparency.
Values: Maintain

CEREMONIES // TECHNIQUES

CEMBA WALKS
Periodic observations, done on a regular schedule, will help encourage maintenance of values, and will allow leaders to see for themselves how aligned teams are to the established set. Questions can be posed to the teams, and real-time feedback and coaching can be provided.

ENTERPRISE RETROSPECTIVES
Conduct values-based Retrospectives directly with each team to gather feedback on what is working well, what is not working well, and what could be improved related to agile values.

ENTERPRISE IMPEDIMENT BACKLOG
Place impediments and improvements generated by Retrospectives on the Enterprise Impediment Backlog to ensure visibility and transparency.

LEAN COFFEE
Maintenance and strengthening of Agile values are best conducted informally, rather than “top down.” Lean Coffee events are an excellent tool for sharing, receiving, and transmitting information.
### Values: Evaluate and Improve Capability

<table>
<thead>
<tr>
<th>Adopting Level Outcomes</th>
<th>Transforming Level Outcomes</th>
<th>Mastering Level Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>✗ Agile values are selected and defined.</td>
<td>✗ Essential stakeholders are engaged and demonstrate agile values.</td>
<td>✗ Agile leaders at all levels are engaged in support of agile values.</td>
</tr>
<tr>
<td>✗ Agile roles and accountabilities are defined.</td>
<td>✗ Agile leaders are trained to live and project agile values.</td>
<td>✗ Visual Information Management techniques are used to display project agile values.</td>
</tr>
<tr>
<td>✗ Agile ceremonies and techniques are defined.</td>
<td>✗ Agile values are prominently displayed throughout each facility.</td>
<td>✗ Agile values are reevaluated, adjusted, and improved over time.</td>
</tr>
<tr>
<td>✗ Agile teams are trained.</td>
<td></td>
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<tr>
<td>✗ Agile teams self-subscribe to established values.</td>
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</tr>
</tbody>
</table>
Values

- Openness
- Focus
- Commitment
- Respect
- Visibility
- Sense of Humor
- Courage
- Fail Fast
Value Tracing

Openness

SCRUM

DAILY STANDUP, SPRINT DEMO,
INFORMATION RADIATORS, SPRINTS
All-ability: The Agile Performance Holarchy
All is not well in the land of Agile...

- 80% of teams are at or below "still maturing" with Agile
- 63% of corporate leaders have a philosophy that conflicts with core Agile values
- 60% of IT organizations have less than half of their teams practicing Agile
- 47% of teams lack experience with Agile methods and techniques
- 51% of tech leaders do not have leadership skills needed for large-scale agility
- 45% of teams lack management support

Source: 2017 State of Agile Survey: VersionOne
Big Agile Retrospective – Sept 27 in DC!

Free for NASCIO members: agilecxo.org
AgileCxO.org

- Agile Leadership Podcast series
- The Agile Performance Holarchy and Assessment Method
- Agile leadership blog
- Agile leadership lightning lessons
- Performance models, training, and certifications for agile organizations
Join me for Part’s Two and Three!
Dates TBD

**Webinar Part Two**
We’ll share lessons learned from over 200 organizational agile assessments at commercial companies and Introduce six interdependent Performance Circles that provide leaders with objectives, outcomes, and actions for successfully leading large-scale, self-organizing teams.

**Webinar Part Three**
We’ll share an assessment method that you can use to evaluate and validate organizational performance against an established level of agility and self-organization using evidence-based methods, categorized as either Adopting, Transforming, or Mastering.
Questions?
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