AT20

Agile Product Management
Thursday, November 8th, 2018 3:00 PM

Shu-Ha-Ri Applied to Agile Leadership

Presented by:

Bob Galen

Zenergy Technologies

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Bob Galen

An agile methodologist, practitioner, and coach, Bob Galen helps guide leaders and teams in their pragmatic adoption and organizational shift toward Scrum and other agile methods. Bob is often called â€œa Coach of Coachesâ€ because of his deep and broad experience in the agile arena. He is director, agile practices at Zenergy Technologies; president of RGCG, LLC; and a frequent speaker at international conferences and professional groups on topics of agile software development. Bob authoredÂ Three Pillars of Agile Quality and Testing, Scrum Product Ownership, andÂ Agile Reflections. A prolific writer, blogger, and podcaster, Bob can be reachedÂ at bob@rgalen.com or at LinkedIn.

Shu-Ha-Ri
Applied to Agile Leadership

Bob Galen
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RGCG, LLC
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Introduction
Bob Galen

- Independent Agile Trainer & Coach at RGCG, LLC
- Director, Agile Practices at **zenergy** TECHNOLOGIES

- Somewhere "north" of 30 years overall experience ☺
- Wide variety of technical stacks and business domains
- Roots of a software developer
- Senior/Executive software development leadership for 20+ years
- Agile "Coach of Coaches" and Leaders
- Deep XP, Lean, Scrum, and Kanban experience since 2000
- From Cary, North Carolina, dog lover, grandfather, husband

Bias Disclaimer:
Agile is THE BEST Methodology
for Software Development…
However, NOT a Silver Bullet!

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CAL
EDUCATOR

ScrumAlliance®
Certified Enterprise Coach

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Shu Ha Ri

Aikido – first learn, then detach, finally transcend

- **Shu**
  - Novice or beginner; narrowly following given practices
- **Ha**
  - Journeyman; following, but extending, perfecting, occasionally breaking the rules
  - Mentoring in specific strength areas
- **Ri**
  - Expert; perfecting to creating your own practices
  - Coaching; mentoring; 'Sticky' practices

3 Phase, Agile Leadership model

- **Shu – Inexperienced agile leadership**
  - ❑ Most agile-entry companies; early adopter
  - ❑ Youthful enthusiasm; fad

- **Ha – Generally experienced agile leadership**
  - ❑ Ex: Google & Fidelity; vertical pockets of agility

- **Ri – Thought Leadership in agile practices; extreme maturity**
  - ❑ Ex: SalesForce or Spotify; across organization

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Shu – Level Leadership

✓ Read a few books, attended a few workshops; truly only a book-oriented view to agile

✓ Perhaps participated in a sprint or two; but with superficial knowledge and limited results

✓ Youthful enthusiasm of agile, not seeing or understanding the fundamental shift in thinking or the requisite discipline and effort

✓ See's agile as mostly a 'speed' play to get more faster; truly doesn't 'get' the other aspects

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Shu – Level Leadership

- ✓ Still focused on traditional metrics and command-and-control project delivery dynamics

- ✓ If pushed, will easily revert to traditional thinking and mindset

- ✓ Will usually ask traditional questions of the team

- ✓ Freely skip sprint reviews; behind the scenes feedback

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Shu – Level Leadership

❑ At your tables, take 5 minutes and brainstorm a set of characteristics that you feel indicate a Shu leader in your companies

❑ Get a clear mental picture of their capabilities so you can "find them" in the wild…

❑ What would a (Shu-) look like? And a (Shu+) look like?

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Ha – Level Leadership

✓ More than transient experience on agile teams; real experience delivering solid products

✓ Starting to understand the notion of Servant Leadership; and, as Pollyanna Pixton speaks about
  - knows when to engage (Step In) and
  - not engage (Step Back) as a leader

✓ Comfortable allowing teams to incrementally fail and/or approach development in ways that are "uncomfortable" for them to observe

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Ha – Level Leadership

- ✓ **Continuous learner from an Agile perspective**
  - ▪ Moving into other areas for lessons: facilitation, business/personal coaching, requirements analysis, business leadership, etc.

- ✓ **Can attend a retrospective w/o creating an unsafe environment and influencing value-added discussions**

- ✓ **Aligned with metrics around core agile interests:**
  - ▪ Value
  - ▪ Quality
  - ▪ People

Ha – Level Leadership

- ❑ At your tables, take 5 minutes and brainstorm a set of characteristics that you feel indicate a Ha leader in your companies

- ❑ Get a clear mental picture of their capabilities so you can "find them" in the wild…

- ❑ What would a (Ha-) look like? And a (Ha+) look like?

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Ri – Level Leadership

✓ Some experience deploying Lean and Six Sigma at an organizational level

✓ Similarly, deployed CMM, TSP/PSP organizationally; understands the dynamics of top-down & bottom-up change

✓ Risk taking; high reward oriented; willing to fail and adept at guiding a Fail Forward posture

✓ Determined to follow through on agile; couldn't dissuade them from the path as they've seen agile successes in previous experience

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Ri – Level Leadership

✓ Would have to fire them rather than them throwing away agile

✓ Effective agile coach to coaches; strong sounding boards within the organization

✓ Can attend a team retrospective and add value w/o direct influence

✓ Operate as an internal agile trainer; mentor to other executives

✓ Facilitate truly crucial organizational steps—architectural roundtables, roadmap / strategy roundtables

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Ri – Level Leadership

❑ At your tables, take 5 minutes and brainstorm a set of characteristics that you feel indicate a Ri leader in your companies

❑ Get a clear mental picture of their capabilities so you can "find them" in the wild…

❑ What would a (Ri-) look like? And a (Ri+) look like?

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Leadership Maturation

- **My contention is that each functional organization in an agile adoption needs at least one Ha+ or Ri level individual**
  - ❑ Per functional organization, for example software development vs. software testing or quality

- **Quite often leadership is "left behind" in the training—having only a superficial understanding of agility**
  - ❑ And no practical experience!
  - ❑ So they're stuck using their traditional approaches & principles

- **They're not considering the 'right' things**
  - ❑ Flow, dependencies / decoupling, team skills, collaboration, co-location, technical debt, JIT architecture & design.

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Leadership Maturation Strategies

- **Recruiting these folks**
  - ❑ Challenge in amplifying agile skills and still have a match for your domain and other needs

- **Bringing in external coaches to serve as these individuals internally while they mentor your staff .**
  - ❑ Trade-off here is cost and finding the 'right' coach
  - ❑ Challenge of finding similarity of coaches at-scale

- **Growing them organically from within your organization.**
  - ❑ Primary trade-off here is time AND getting a parochial view that isn't offset with broader experience.

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Leadership Maturation Strategies

- **Creating x-team focus or collaboration groups to serve as a sort of "board" to fill these roles.**
  - ❑ Can be effective. Often done as an adjunct activity.

- **Creating an Agile COE**
  - ❑ Establish guidelines / guard-rails, checklists, norms for agile ceremonies, tools recommendations, and models.
  - ❑ Centralized expertise.
  - ❑ Driving internal training

Other Factors

- Don't simply trust what folks' say their understanding is…observe their behavior…

- Under normal circumstances and particularly…under stress…

- What do they do when pressured?

Asking the 'Right' Questions
in terms of Shu, Ha, and Ri

- **Don't ask your traditional (fixed scope, cost, schedule) questions. Instead:**
  - ❑ Ask defect backlog questions…………….….…………………(quality)
  - ❑ Ask if the team has failed recently……………..………(risk taking, trust)
  - ❑ Ask collaboration questions……………..….………(getting it 'right')
  - ❑ Ask customer interaction questions……...…..…………(getting it 'right')
  - ❑ Ask velocity questions………………(are you improving, can you plan)
  - ❑ Ask burndown (or burnup) questions……………(do you pay attention)
  - ❑ Ask about varying scope………………..(are you a healthy agile team)
  - ❑ Ask about prioritization and trade-offs………(again, healthy tradeoffs)
  - ❑ Ask customer found defect questions…………(customer first, quality)
  - ❑ Ask if the team needs your help………………..(vulnerability, maturity)
  - ❑ Ask about their last retrospective actions....(continuous improvement)

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What are the 'Wrong' Questions or Positions?

- Are we done yet? Are we there yet? Over and over…
- We can't de-scope that feature?
- To heck with a Sprint #0, I want to hear keys typing on Monday morning
- We can't re-plan the sprint, let's work through it; and don't tell anyone we're in trouble
- Are we working hard enough? Is the team committed to the project?
- Expecting the Iron Triangle to hold (Cost, Scope, Time) without compromise
- Not trusting the teams' estimates…or asking for second opinions
- Or asking over and over until they get the answer they want
- Quality is assumed free—without the hard work

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Adopting the 'Right' Behaviors
in terms of A, B, or C

- Servant-Leadership
- Continuous improvement
- Quality…built-in; Build it right
- Craftsmanship
- Customer—value focused
- Collaborative; fostering team behavior & performance
- Co-located; collaborative
- Team investment (hiring & training)
- Flow
- Empowered and committed self-directed teams
- Innovation & creativity
- Sustainable pace

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Assessment Dynamics

- **Keep it lightweight and not too serious**
  - ❑ Reassess often
  - ❑ Don't get "hung up" on colors or levels. This is a rough view and feedback will vary

- **Who can assess leadership?**
  - ❑ Agile pilot teams and/or team leaders
  - ❑ Scrum Masters, Product Owners
  - ❑ Internal or External coaches
  - ❑ X-team perspectives; observers & interactions

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Assessment Dynamics

- **The key points**
  - ❑ Gain a _landscape view_ of leadership agile skill competency and capabilities
  - ❑ Know where to go for help; and who needs help
  - ❑ Assess your continuous improvement progress
  - ❑ Drive your agile adoption strategies from pattern observations of your strengths & weaknesses

- **No direct leadership participation or influence**

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Agile Leadership Evolution Workshop Breakouts

1. **Lay-out your organizational structure (10 Min)**
   - Both the local structure(s) focused on agile (Development, Testing, BA, etc.)
   - And the more global organizational structures (Marketing, Support, Accounting)

2. **Identify your leadership types in each organization or group (5 Min)**
   - Shu Level = **Red**, Ha Level = **Yellow**, and Ri Level = **Green**
   - Look for patterns of strength & weakness

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Agile Leadership Evolution Workshop Breakouts

3. Discussion in your group aligned with maturing your leadership organization (15 Min)

   - Explore strategies targeted towards strengths—strengthening & amplification…
   - Explore strategies targeted towards weaknesses—improving…
   - Prepare to share some strategies / approaches with the overall group
   - Read-out

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Org Chart View
Low Level Teams
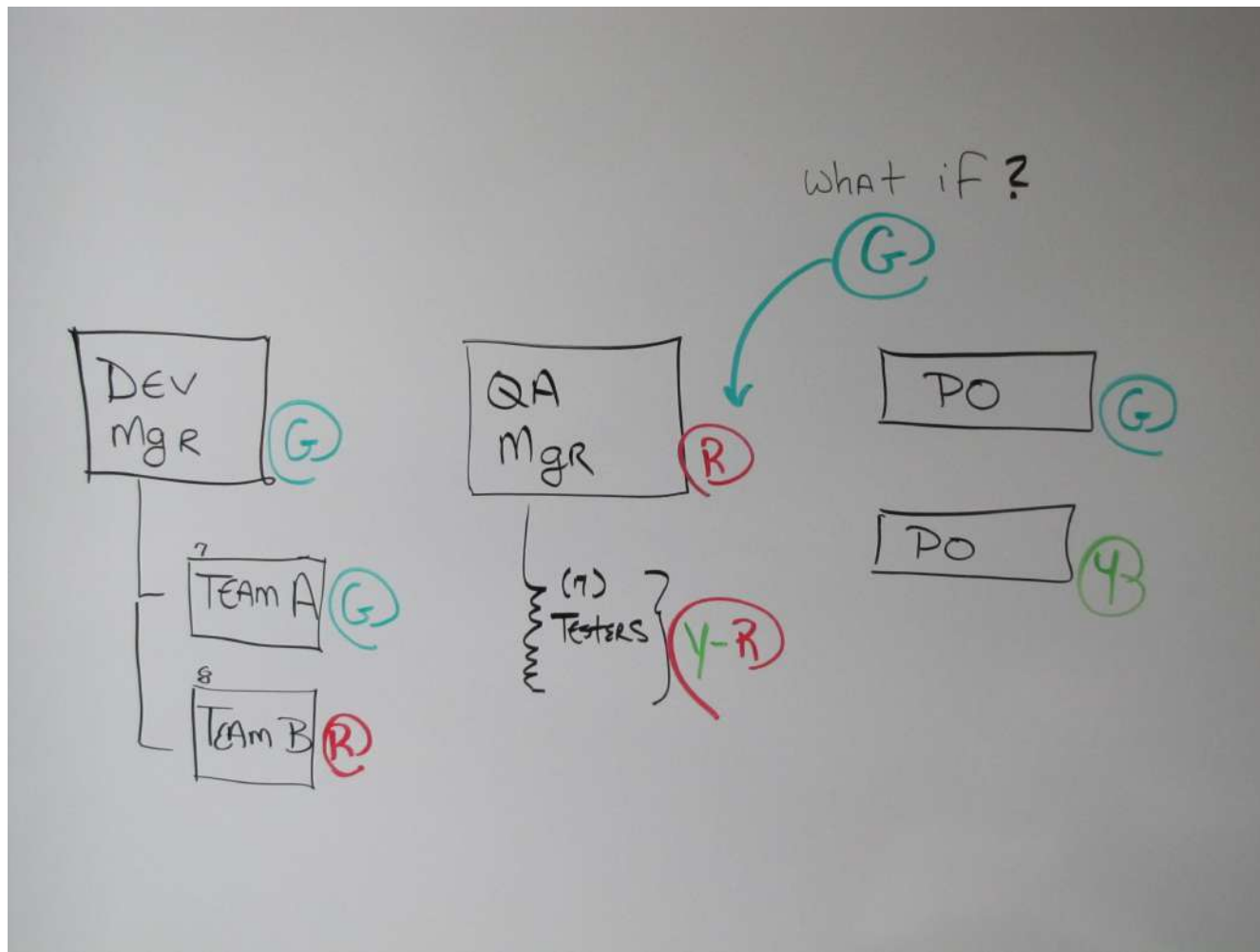
Org Chart View
Dev vs. Product
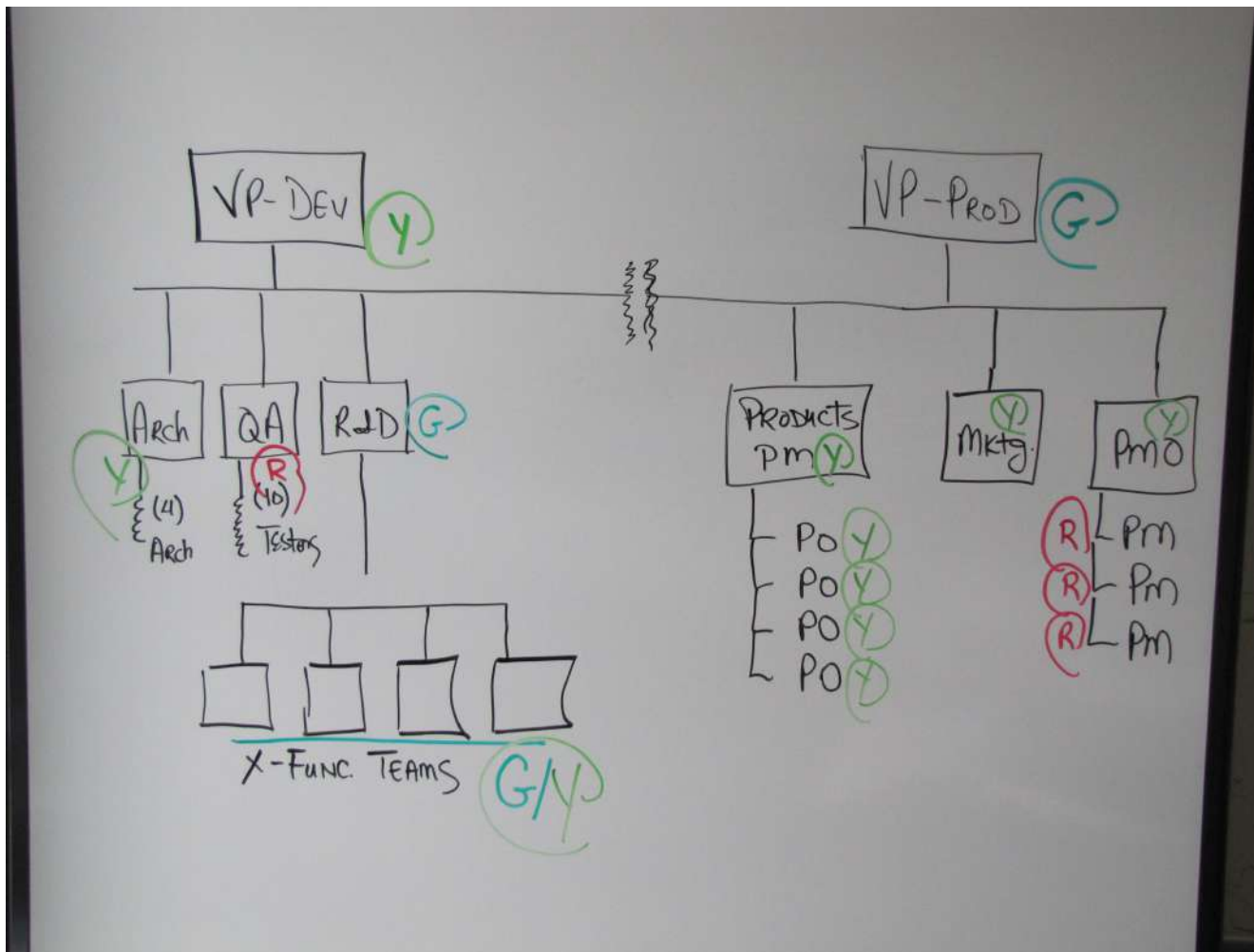
Org Chart View
Global Organization

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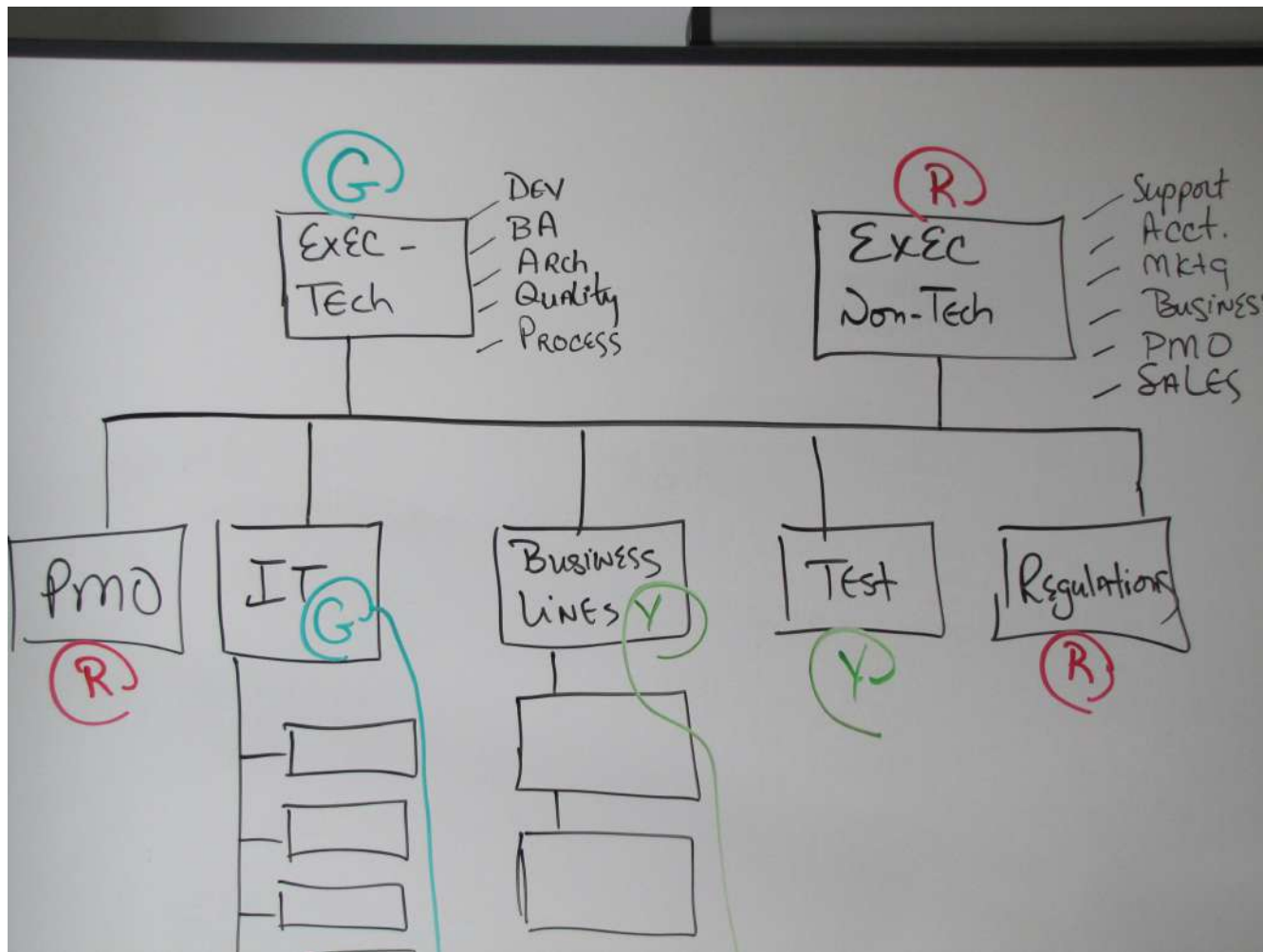
Kiviat View
R&D Organization
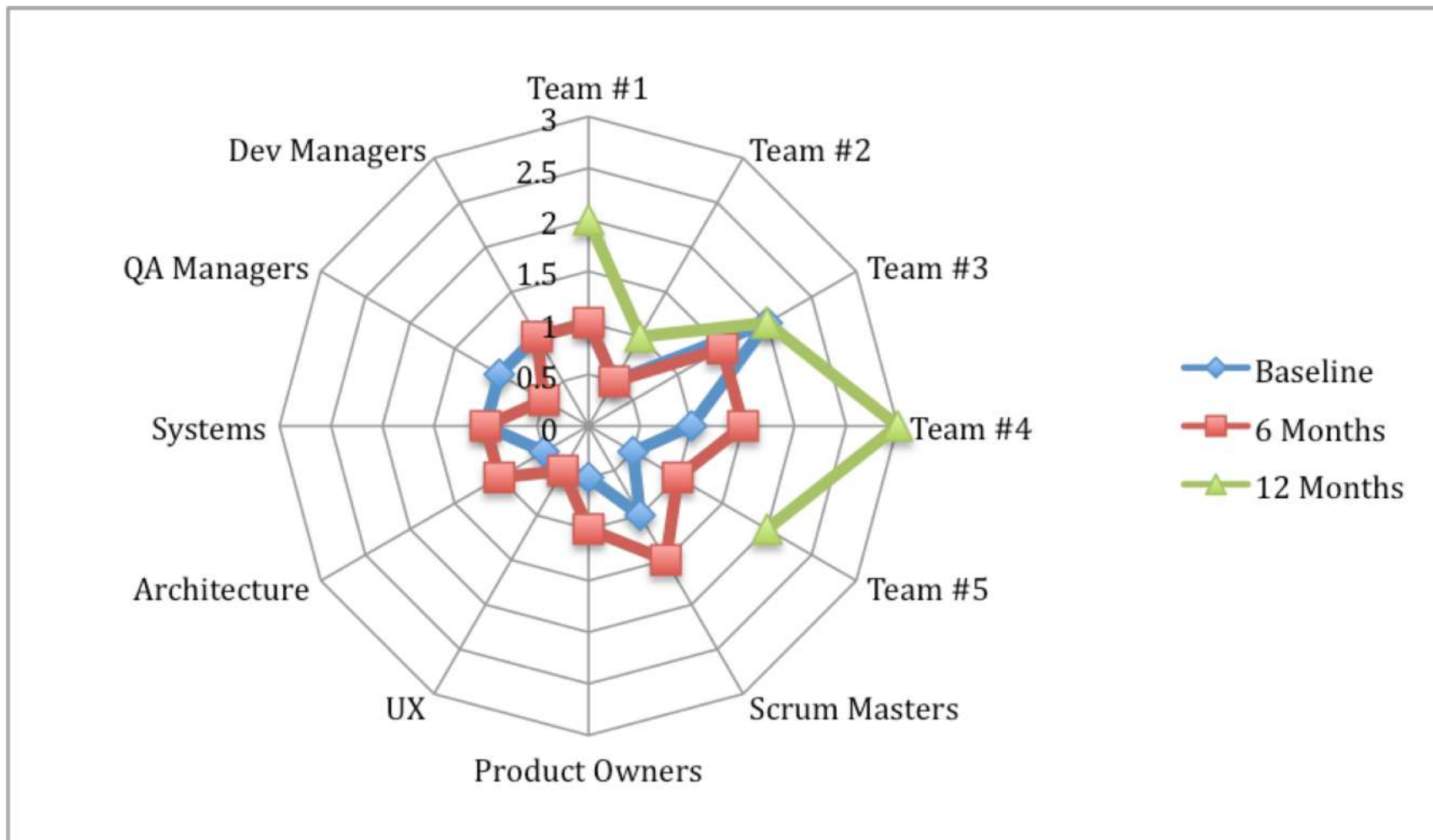
Kiviat View
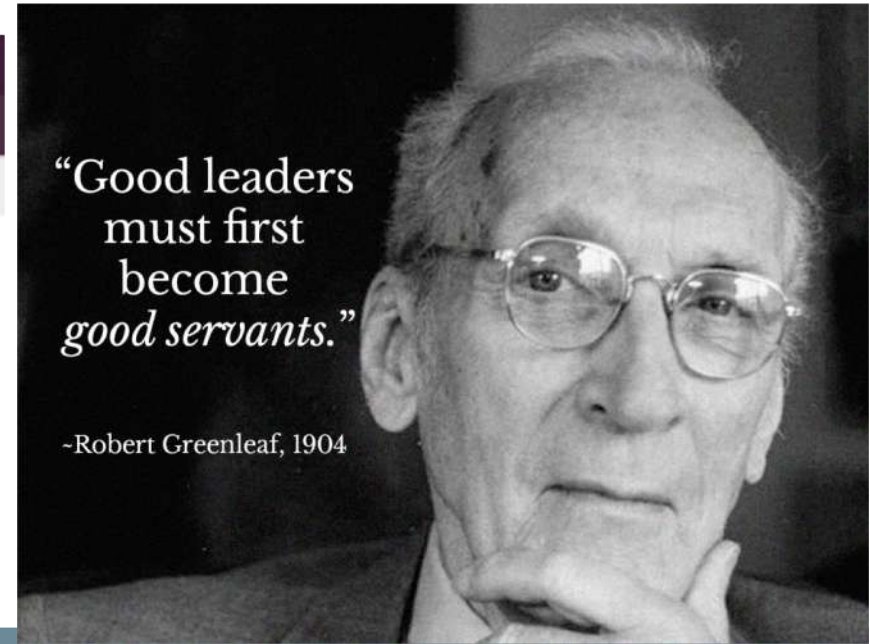# Technology Organization
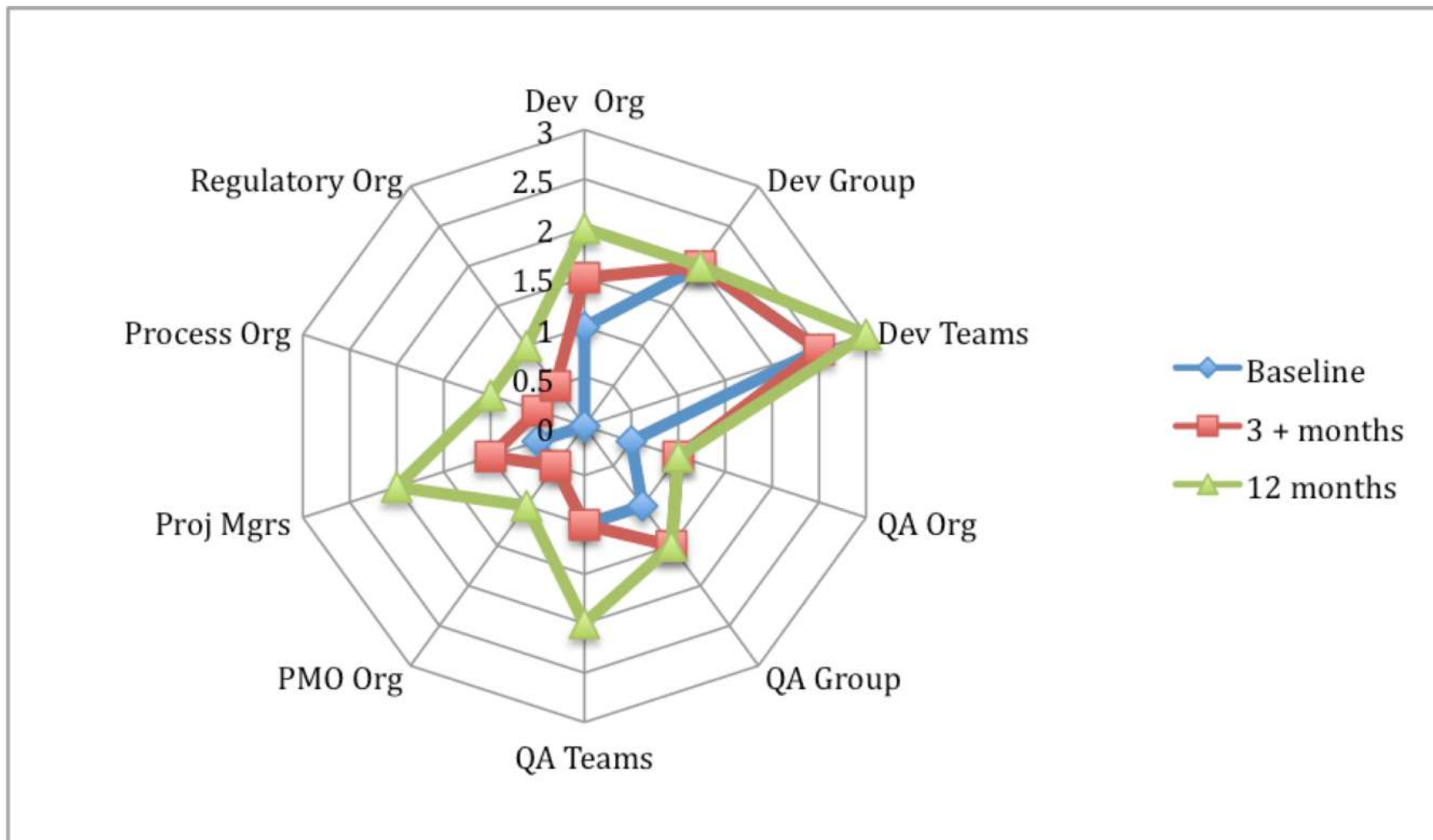
Kiviat View
Global Organization
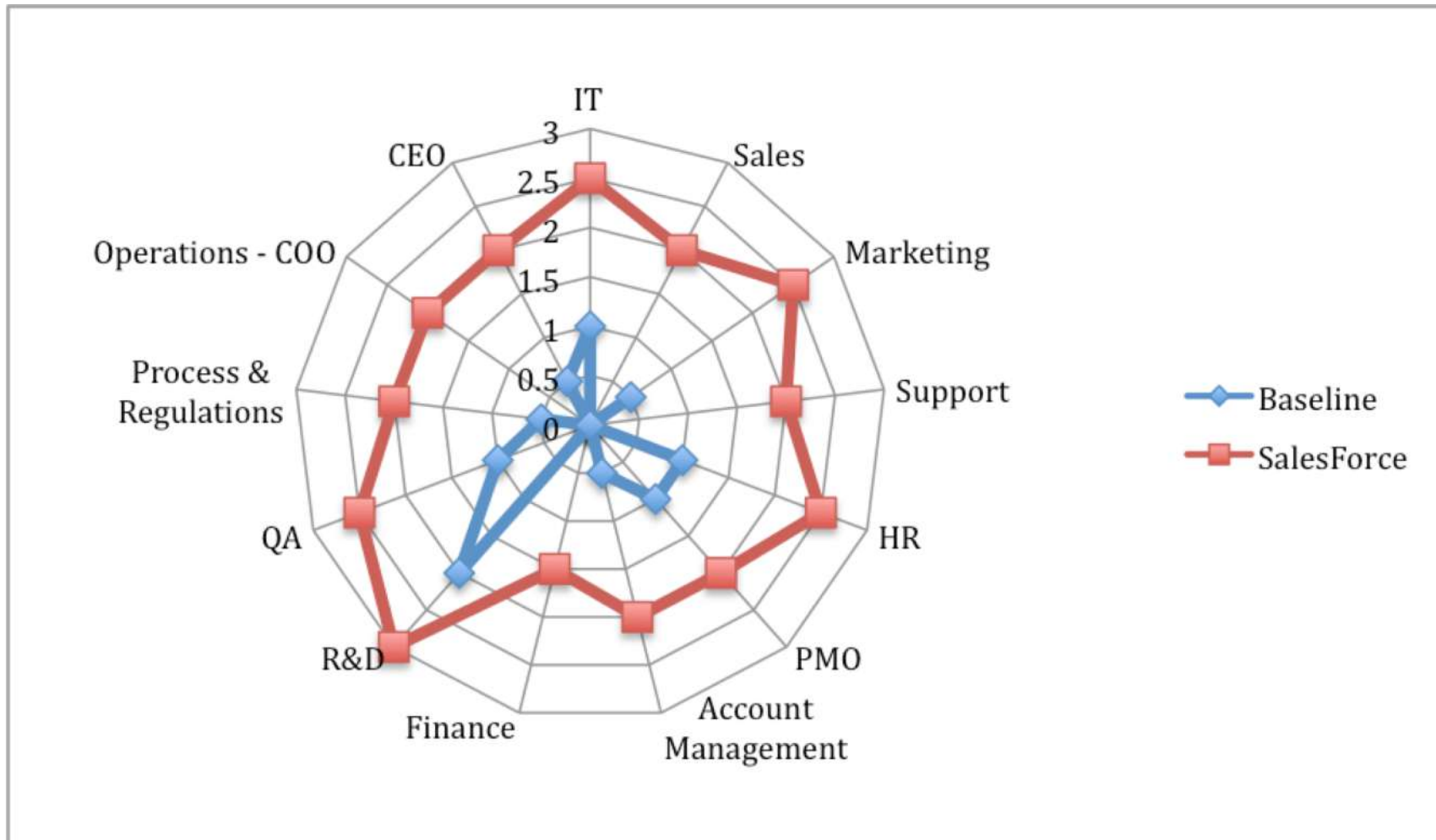
It matters what leaders do or don't do

"The culture of any organization is shaped by the worst behavior the leader is willing to tolerate."

Gruenert and Whitaker

"Good leaders must first become *good servants*."

~Robert Greenleaf, 1904

Values

Comparing documented values with stories of actual behaviors helps you reinforce and redefine the culture, iteratively.

Culture is shaped by the best behaviour the leader is willing to amplify.

Jurgen Appelo

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Exit the Workshop with…

- A list of clear goals for why your organization is "going agile" and what you hope to achieve by leveraging it
  - ❑ Contrast before & after states. Any adjustments?

- A color coded organizational chart that illustrates your 'levels' of agile leadership maturity across your organizational
  - ❑ A <u>heat map</u> of strength vs. weakness in understanding & competency

- A brainstormed list of strategic actions to improve leadership maturity aligned towards your goals.
  - ❑ Prioritized for action; focused on functional 'balance'
  - ❑ Leveraging "Greens" to help "Reds"

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Wrap-up

- Does leadership maturity matter?
- How will you begin to re-assess your maturity levels?
- Strategies for increasing it?
- What ideas did I miss?

- Final questions or discussion?

Thank you!

Contact Info

Bob Galen
President, RGCG

Experience-driven agile focused training, coaching & consulting
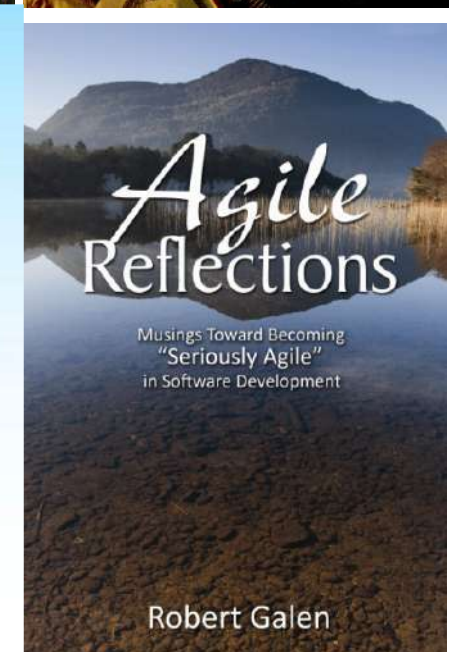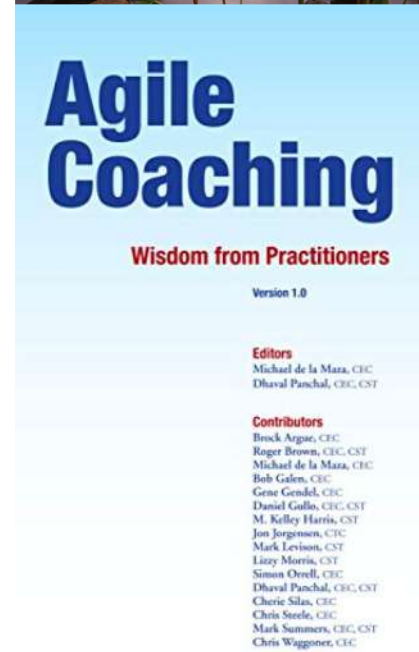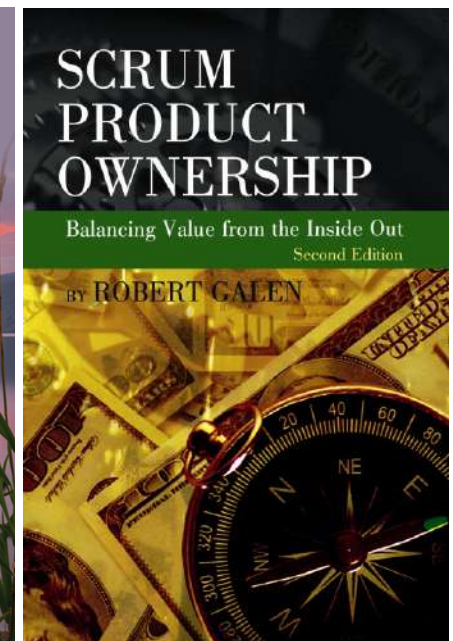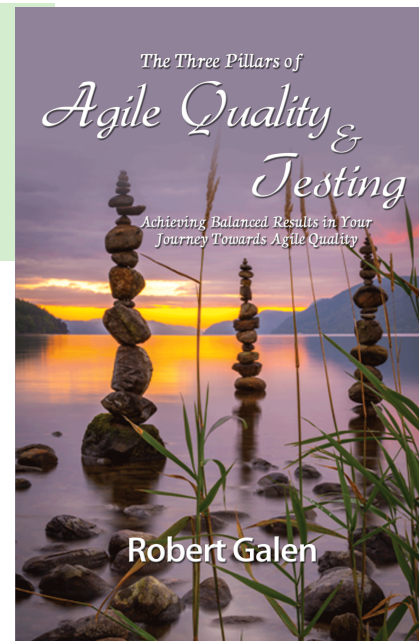
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Podcast on all things 'agile' –
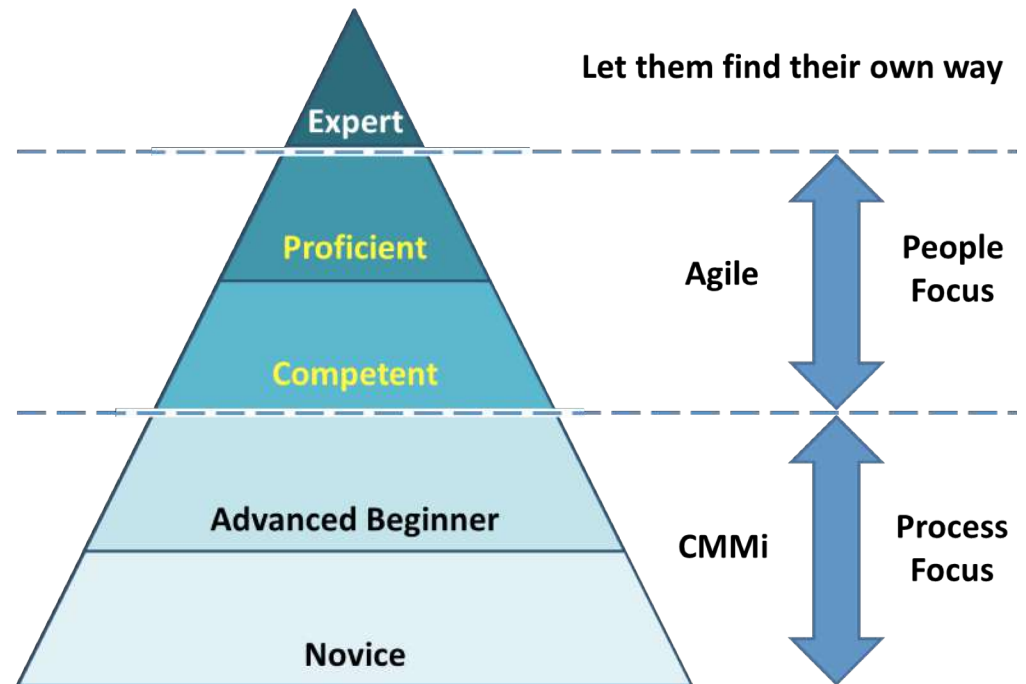http://www.meta-cast.com/

Dreyfus Model of Skill Acquisition

- 5 stage model for skills acquisition:

  1. Novice – rigid adherence
  2. Advanced Beginner – limited situational perception
  3. Competent – some perception of actions in relation to goals
  4. Proficient – holistic view of situation; prioritizes importance of aspects
  5. Expert – transcends reliance on rules; intuitive grasp of situations based on deep understanding
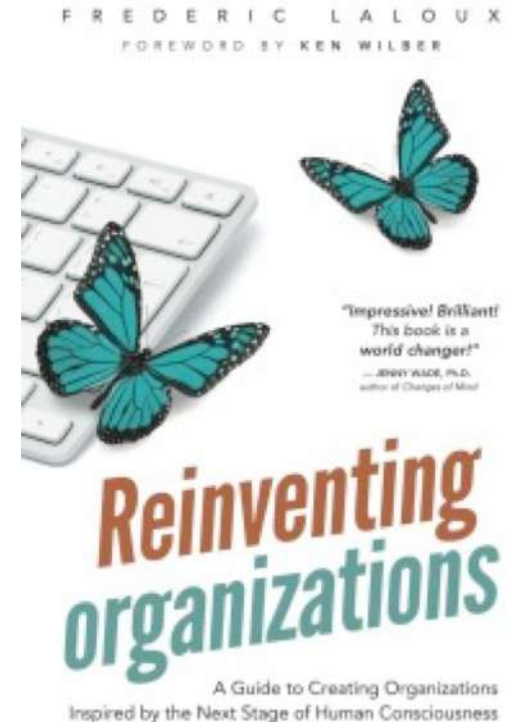 6. New stage – Innovation

Let them find their own way

Expert

Proficient

Competent

Advanced Beginner

Novice

Agile — People Focus

CMMi — Process Focus

Agile, Offshore and Dreyfus Model of Skill Acquisition

While a three phase model is simple, you could easily replace it with a Dreyfus derived model…

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Laloux Culture Model

FREDERIC LALOUX
FOREWORD BY KEN WILBER

- **RED – Powerful Leader**
  - ❑ Compliance, fighting chaos
  - ❑ Command Authority, Division of Labor
  - ❑ Mafia, Gangs, Militia

- **AMBER – Army**
  - ❑ Hierarchy, Stability, Strong Control
  - ❑ Taking a long term, Processes, Roles
  - ❑ Public schools, Churches, Governments

- **ORANGE – Machine**
  - ❑ Competition in/across, Profit and Growth, Leaders goals
  - ❑ Innovation, accountability, meritocracy
  - ❑ Most corporations today

"Impressive! Brilliant! This book is a world changer!"
— JENNY WADE, Ph.D., author of Changes of Mind

Reinventing organizations

A Guide to Creating Organizations
Inspired by the Next Stage of Human Consciousness

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Laloux Culture Model

■ **GREEN – Family**
  - ❑ Customer, shared values, High Employee engagement
  - ❑ Balanced needs of stakeholders, focus on culture over strategy, empowerment
  - ❑ Southwest, Ben & Jerry's
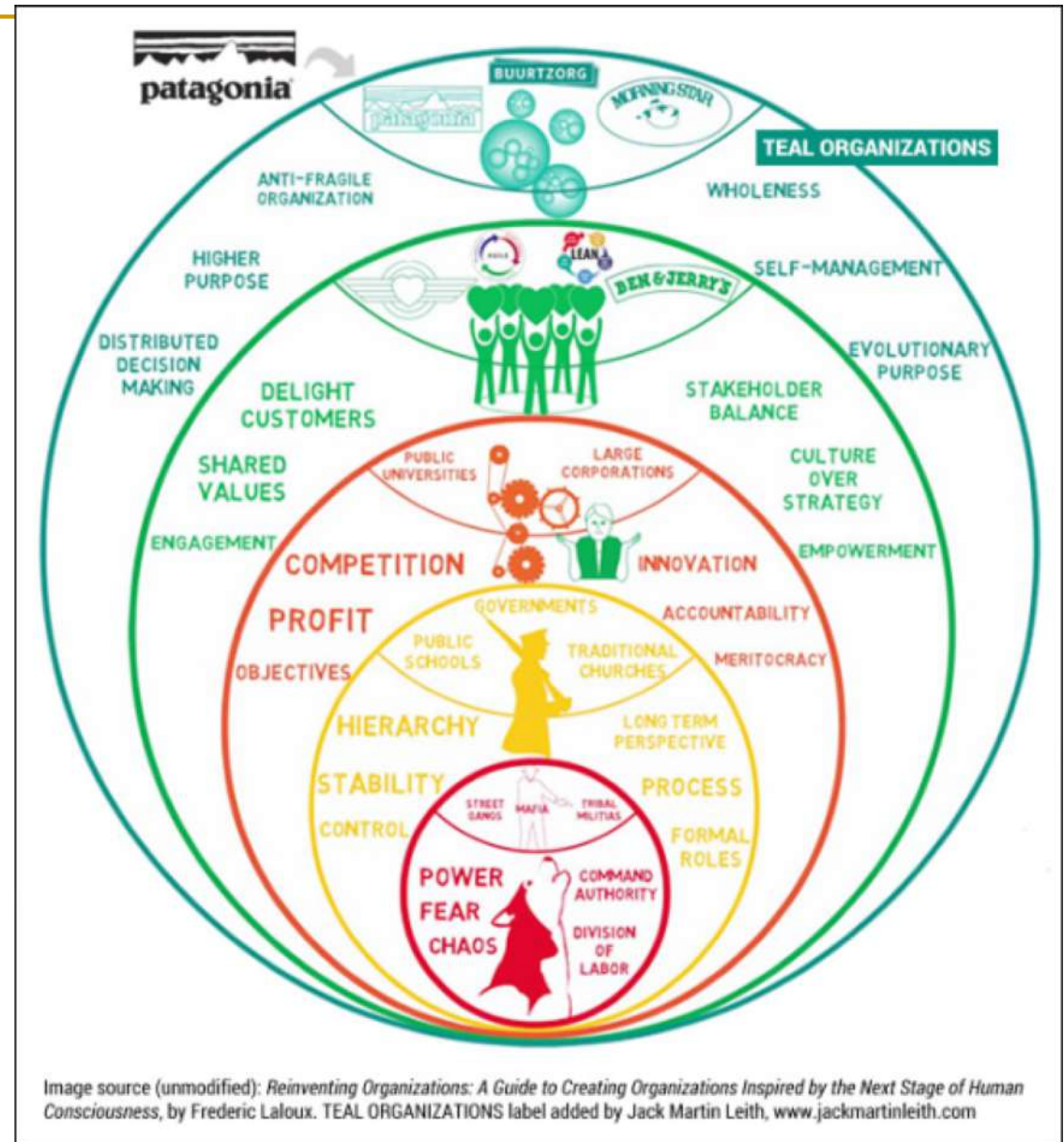
■ **TEAL – Living System**
  - ❑ Anti-fragile structure, flat roles, evolutionary purpose, distributed decision-making
  - ❑ Wholeness, self-management, evolutionary purpose
  - ❑ Patagonia, Morningstar,

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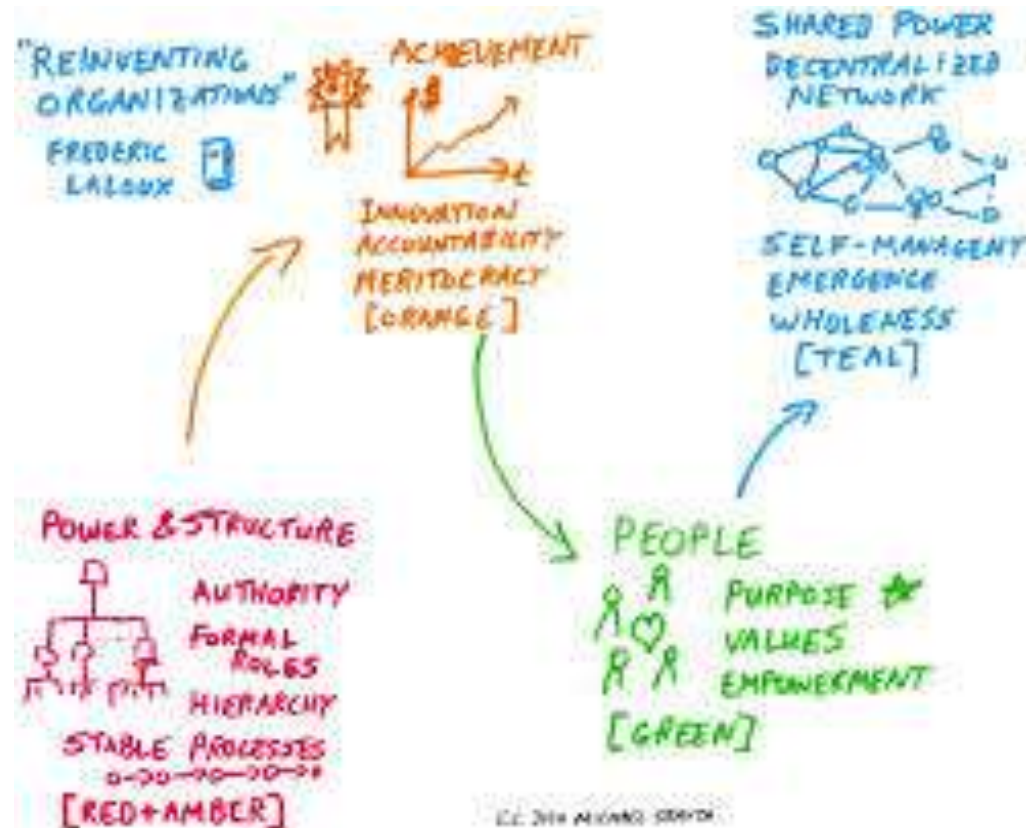
Cultural Maturity

Shu Ha Ri maturity aligns with the Laloux model.

So not simply agile knowledge and experienced, BUT also alignment to Green / Teal principles & behaviors

Image source (unmodified): *Reinventing Organizations: A Guide to Creating Organizations Inspired by the Next Stage of Human Consciousness*, by Frederic Laloux. TEAL ORGANIZATIONS label added by Jack Martin Leith, www.jackmartinleith.com