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 area

- **Ri**
  - Expert; perfecting to creating your own practices
  - Coaching; mentoring
  - ‘Sticky’ practices
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
Level A Leadership
SHU

✓ 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
Level A Leadership
SHU

- 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
Level B Leadership

HA

✓ 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
Level B Leadership
HA

✓ 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
Level C Leadership

RI

✓ 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
Level C Leadership

RI

✓ 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
Leadership Maturation

- My contention is that each functional organization in an agile adoption needs at least one Level C 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

- Considering the ‘right’ things
  - Flow, dependencies / decoupling, team skills, collaboration, co-location, technical debt, JIT architecture & design.
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.
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
Asking the ‘Right’ Questions
in terms of A, B, or C

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)
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
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
- Co-located; collaborative
- Team investment (hiring & training)
- Flow
- Empowered and committed self-directed teams
- Innovation & creativity
- Sustainable pace
Agile Leadership Evolution Workshop

Breakouts

1. What were (are) your organizational motivations, goals and expectations surrounding the move towards agility?

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

3. Identify your leadership types in each organization or group
   - Level A = **Red**, Level B = **Yellow**, and Level C = **Green**
   - Look for patterns of strength & weakness
Agile Leadership Evolution Workshop
Breakouts

4. Discussion in your group aligned with maturing your leadership organization
   - Strategies targeted towards strengths—strengthening...
   - Strategies targeted towards weaknesses—improving…
   - Prepare to share some strategies / approaches with the overall group

5. Re-align your efforts back to your goals
   - Do you need to change or refine your goals?
   - How?
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
  - Before contrasted with after

- A color coded organizational chart that illustrates your ‘levels’ of agile leadership maturity across your organizational
  - A heat map of strength vs. weakness in understanding

- A brainstormed list of strategic actions to improve leadership maturity
  - Prioritized for action; focused on functional ‘balance’
Thank you! What’s Next?

- I’m going to collect:
  - Patterns of organizational maturity across the attendees
  - Maturation strategies – tied to the patterns
  - Agile goals that are driving adoption across the attendees

- And then send back out to folks who sign-up for redistribution of results...
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