Agile & HR: Driving cultural change as one team

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Is your HR department slowing you down? Do you feel like they are a major impediment in your agile journey? Imagine a world where your HR team is a proactive driver of change for your cultural transformation. We will tell the story of how Vistaprint's HR team, now known as Talent + Experience Transformation Team (T+E), spent the past 2 years moving away from traditional HR to explore a more agile way of working that enables an exceptional employee experience.

1. INTRODUCTION

Vistaprint's Agile journey started in technology but has expanded across various parts of the organization including creative, marketing, and HR. This report tells the story of how the HR team, now known as Talent + Experience Transformation Team (T+E), transformed from a traditional HR team of office dwellers and privacy screens to a more Agile way of working. We'll discuss what propelled the transformation, the critical steps we took to make it happen and the lessons we learned along the way.

2. BACKGROUND

This is the story of how three Agile coaches helped Vistaprint's HR team adopt an Agile mindset. To learn more about us, see our biographies at the end of the report.

> Amy Jackson – Agile Coach with a background in HR
> Staci Dubovik –Agile Coach with a background in User Experience Design & Research
> Melissa Rockman – Agile Coach with a background in Online Marketing & Conversion Optimization

Vistaprint is a global e-commerce print company with a mission of helping small businesses live their dreams. To do this we provide custom printed products to over 16 million customers worldwide. While best known for business cards, Vistaprint has expanded its product portfolio to carry everything a microbusiness owner needs to market their business. This means hundreds of customizable products ranging from postcards and banners to T-shirts and water bottles. Accelerating this product growth is one of the goals of our Vistaprint Agile transformation. Vistaprint was founded in 1995 by Robert Keane, now CEO of our parent company Cimpress. Since 1995 we have grown to over 7,000 employees across over 20 different offices covering marketing, technology, manufacturing, customer care, and general & administrative functions.

3. VISTAPRINT'S AGILE TRANSFORMATION

Before diving into the HR team's Agile journey, we want to set the stage with a quick summary of what was happening with Agile across Vistaprint.

Around 2013 Agile began to take roots in our technology organization. Teams were looking for a way to respond to the fast-changing market and added complexities in the technology world. Organically teams began to experiment with Agile with support from a few part-time coaches.

In 2014 our Marketing and Creative teams began to experiment with Agile. In response to the growing interest in Agile a Coaching Team was established. Early on the coaches decided to operate using a pull model, meaning that teams must ask (pull) for Agile support. The pull model was a key guiding principle for our Agile transformation from day 1 and still one of the factors to which we attribute our success.

To learn more about Vistaprint's Agile transformation, see the appendix.

4. HR TEAM'S FIRST EXPOSURE TO AGILE

In late 2015, there were two challenges the HR team wanted to address: 1) What to do about Performance Management – it wasn't working and 2) How to organize teams to deliver value to customers faster. Working through these challenges in a new way, as described below, led the HR team to think differently about how they approach their work and how they involved employees. It was through working on these challenges that the team saw value in this new way of thinking, with an agile mindset, and was ready to learn more about agile.

4.1   Challenge 1: Performance Management

In 2015 Vistaprint's HR leaders started looking at their performance management process because teams across the organization felt that it was slow and outdated. Additionally, the technology teams were reporting that the performance management process wasn't effective in their new Agile environment. At the same time, the HR team was keeping up with industry trends and learning that organizations were beginning to move away from their annual performance processes. Given the internal feedback and external trends, the HR team started discussing what they might do to solve for the problems they were facing, including:

- Employees and managers feeling disengaged with the annual performance review process.
- Feedback that made its way to employees at annual reviews often felt outdated and the opportunity to learn from it had long passed. It was also anonymous so people didn't know where the feedback was coming from which made it less valuable.
- The Performance Management tool forced ratings and feedback for a specific list of competencies. This meant managers were often getting creative to try and force-fit feedback into competency categories and, as a result, the feedback felt forced and didn't always resonate with the employee.

To address these issues, the HR team knew they needed a different approach, one that would be more meaningful for employees. Through conversations with some Agile-minded technologists, they learned about Open Space (Technology) and that is when their HR Agile journey began, in November of 2015.

An invitation was sent to all employees in the Waltham and Barcelona offices asking if they would like to participate in an Open Space to explore ideas for improving the performance management processes. About 80 employees across these two locations opted to participate in the open space. The statement and question that was presented to the participants was:

> *The organization is looking at our processes surrounding performance excellence, career pathing, and goals. We are looking to drive more impact while being bold, fast and nimble. Externally we are seeing trends that demonstrate organizations are making radical changes around the ways they grow and develop their talent. The question is: what should we do?*

4.2   Results of the Open Space on Performance Management

During the open space the groups self-organized and many great ideas were generated. Based on these ideas from the Open Space, the HR team announced changes to Performance Management that eliminated the annual performance review. These changes were in support of the feedback they heard and the culture Vistaprint was driving towards, one of agility, speed and simplicity.

Experiencing the Open Space helped set the HR team down a path of thinking differently. They realized the value in involving employees early on and asking employees what they needed to be successful.

4.3   Challenge 2: How to organize teams to deliver value to customers faster

In May of 2016, the Vistaprint leadership team and the HR leadership team started hearing from the organization: teams were facing challenges regarding the speed with which they were able to deliver customer value due to:

- Lack of clarity on the work they were trying to achieve
- Conflicting priorities across the organization
- Silos due to our functional operating structure

Rather than working on this challenge in isolation (which is a traditional HR practice), the HR team pulled together a global cross functional team to tackle the problem and co-create solutions with employees.

Eventually this led to a few organizational changes, the most notable being the introduction of our Enterprise Visibility Room.

5. OUR T+E STORY

The team discovered that co-creating and collaborating with employees to tackle these two problems was a better way of working. By engaging directly with employees, they created better solutions. The team was hungry for more opportunities to learn about Agile and how they could apply it to their work.

Up until this time, the HR team had always been a reactionary "support the business organization". These early exposures to Agile and new ways of working were a catalyst for change. The HR leadership team wanted to make a different kind of impact. They wanted to proactively create an environment where teams could be at their best to execute on Vistaprint's purpose: to help small business owners live their dreams.

HR, as a function, is often viewed as a blocker when it comes to Agile. HR is typically known for rigid processes and rules that are in favor of protecting the organization vs. supporting employee engagement. For this reason, the team decided to rebrand themselves with a new name. In June of 2016 they changed their team name from HR to Talent + Experience (T+E).

The name change reflected the desire to work differently, but change didn't happen overnight. For several months the T+E Leadership team continued to support the business in a traditional way while simultaneously working to figure out how to reposition their value to the organization. The T+E Leadership team started looking for inspiration from the outside. They researched what other companies were doing in HR and how they were adopting an Agile mindset. They were inspired by external companies such as Riot Games, Airbnb, Microsoft, Pandora, and The Future of Work Podcast with Jacob Morgan. The team was clear on the impact they wanted to have, but they needed support – how would they establish their strategy and begin to execute against it in a new and different way? That's where the Agile Coaches come in – about 9 months after their name change, they were ready to fundamentally change the way they worked.

5.1 Coaching T+E

Timing is everything. As the HR team was learning about Agile, so were more and more teams across Vistaprint. As a result, the Agile coaching team recognized a need to hire additional coaches to support the Agile transformation. This is where we: Amy, Staci, and Melissa, first came together. We joined the Agile coaching team which tripled in size to 12 coaches globally. Those of us new to coaching completed a 6-month Expert Coaching Pathway education.

As part of our coaching education, we needed to put what we had learned to practice by coaching a team. Given Amy's experience in Talent + Experience, she knew they needed support, and more importantly, she knew they would be open to coaching. Amy and Melissa paired on the engagement.

To start our coaching engagement with T+E we first spent time talking to the team to gauge where everyone was. We found most team members had little to no exposure to Agile, and some who were quite skeptical of the newest buzzword. Vistaprint has a culture of continuously looking to improve but not everything we try is successful. Some teammates were skeptical that Agile would be just another thing we try and ultimately abandon. We told the team that this uncertainty is natural; we as coaches had been there too as we struggled with our own Agile journey. We knew exactly where everyone was coming from and used this shared experience and empathy to gain trust with the team.

We started with, "Let's just have a conversation". We gathered the team for one hour to share Vistaprint's Business Agility Values & Principles. Yes, you read that correctly. We don't use the original Agile Manifesto. While that may seem crazy to some, Vistaprint had learned along our Agile journey that the original manifesto didn't resonate as well with teams outside of technology. Because we didn't want non-technology teams to resist Agile over a few words, we changed them. We maintained as much of the original manifesto as possible while adding some concepts from Modern Agile and the Agile Marketing Manifesto. We removed all the software-centric words, which became a barrier for our non-technology teams to experiment with Agile.

During our first values & principles discussion we had an open conversation on what the team thought would and wouldn't work. We told the team we didn't expect anyone to be 100% thumbs up on all the principles. Agile is a journey; it takes time to shift your mindset and break all your thinking habits.

Soon after, we introduced the idea of Kanban. We chose to start with visualizing the work, just one of the six Kanban principles. We decided to do this because we wanted to meet the team where they were. We did not want the team to be turned off by Kanban because of the seemingly overwhelming rules. We wanted a small win that could be seen and felt quickly. That's just what happened. Within the first 90-minute session, the team

had all their work written on Post-its and visualized on a physical board. Immediately they started saying how helpful it was to see what each person was working on. They quickly found opportunities to reduce duplicative work and areas where they could learn and partner with one another. We asked if they would be willing to review the board in standups and they said yes – they were excited to get started.

Within a week of setting up the Kanban board, the team was holding standups and reviewing their work on the board on a regular cadence. It was as if a new team emerged overnight. The team was talking to each other, face-to-face, on a daily basis. Different silos were working together to get work done faster, simply because they recognized synergies and opportunities to pair in the standups. The old-school HR stigma was literally evaporating in front of our eyes. It is amazing what some colorful sticky notes can do!

After a few weeks of using the board and attending standups we introduced the idea of retrospectives. We explained that no process is perfect and retrospectives allow you to reflect, inspect and adapt. Through the first retrospective, the team identified two actions to improve: 1) to walk the board lane by lane (vs. person by person) and 2) to send pictures of the physical board to the global teammates located in other offices.

The next step in their (T+E's) evolution would be to figure out how to reposition their value to the organization, which started with establishing a new team purpose. Working closely with the team, Amy and Melissa designed and facilitated a 2-day off-site for their global team to accomplish the following outcomes:
- Establish a new purpose, centered around the employee experience
- Determine the strategy to execute on the purpose
- Prioritize work to be done in the first half of our FY18 Fiscal year (July-December)
- Determine first increments of work
- Introduce additional Agile topics to enable new ways of working
- Build relationships and have fun!

In just two days, the team accomplished all of the above. Most notably, the team co-created a new purpose:

> *To create and enable a customized and exceptional employee experience that inspires and supports our teams to deliver their best work for our customers.*

With the new purpose, the team recognized a need to change the way it was organized. To date the team had been operating much like many other HR teams: HR business partner, functional silos, heavy focus on process, etc. Inspired by the research they had done prior to their offsite, they discussed how the team should be structured to deliver against their new purpose.

They ended up with a team structure that was focused around delivering their "product," the Employee Experience. They recognized that this product, Employee Experience, is made up of different experiences, as such, they defined the product experiences as:
- Acquire & Onboard
- Performance & Feedback
- Grow & Develop
- Reward & Recognize
- Culture
- Systems

As Agile coaches, we shared some light education on cross-functional teams and the role of the Product Owner (PO). This resonated strongly with the T+E team and they decided to assign a PO to each experience listed above. The PO would be accountable for delivering against their product and would work incrementally, with feedback from employees, to deliver value. As coaches, we would be there to support them.

The PO of each product would also be responsible for building a cross-functional team to execute on the work. The members of these cross-functional product teams would come from other areas of the business (marketing, creative, communications, etc.). They would leverage individuals who had passion for the product to help execute the work of these teams. This was something we had never done before: co-creating the employee experience with the employee.

The team also recognized the need for an Employee Insights group. This small team would be responsible for external research on where the industry was going relative to these product experiences. Additionally, the Employee Insights group would help the PO's conduct focus groups (to collect feedback) from employees as they delivered against their product.

With a new T+E structure in place, we encouraged the team to discuss the factors in place that would enable them to be successful in this new operating model. The team came up with the following enablers:
- The energy, passion, mindset, and knowledge of this team
- Support of leadership – they wanted to transform too!
- Introducing the Agile mindset
- Strong relationships across the organization
- A global and diverse team

We also asked them to discuss the challenges that might slow them down so that they could mitigate anything within their control. These challenges included things like:
- How do we communicate our new strategy to the organization?
- How do we move away from our functional roles to deliver against the product experiences?
- How do we self-organize and understand our bounded authority?
- How do we rethink the value we bring to the organization? Do we all buy into this?
- Overthinking things – just get started!
- Do we have the right skills on the team?

We were supportive and honest with the new PO's: this will be a learning experience. They might not get it right the first time. We encouraged them to work together and communicate often: What is working for you? What isn't? We approached our coaching engagement as a partnership with T+E and this approach resonated well with the team. They were not afraid of us judging them or testing their knowledge. Instead, they recognized that we were invested in the work and there to support them.

Once the T+E structure was established we continued to coach the T+E product teams to apply an agile mindset and approach to their work. Some examples include:

- Fall 2017 – Acquire & Onboard: Melissa Rockman brought back the idea of Interview Games after attending a session at Agile 2017 (Jason Tice's session: Hire Great People for Agile Teams Using Interview Games). Melissa met with the product owner of Acquire & Onboard to discuss how we could begin experimenting with interview games at Vistaprint. Since then we have successfully used interview games to hire candidates who we feel are better cultural fits. In addition, the candidate feedback has been extremely positive towards the games in that they allow for a meaningful, transparent, and fun interview.
- Fall 2017 – Human Resources Information System (HRIS): We coached the team to think incrementally to deliver the first increment of a new HRIS system in just three months (vs. the partner's quoted timeline of +1 year).
- February 2018 – Role of the Leader: As Vistaprint has become more Agile, how we view the role of the leader is changing too. The T+E team was responsible for designing and executing a new leadership training to help educate the organization on our new leadership mindset. What might have once been designed and rolled out in a large process (big bang) is now being designed and delivered incrementally (with feedback all along the way).

5.2   Agile Coaches – How we work

In November of 2017 it was decided that the Agile Coaching team, which had always reported into our Technology organization, would realign and report into Talent + Experience. It was a natural evolution to combine two teams dedicated to driving cultural transformation across Vistaprint under one larger team, now called the Talent + Experience Transformation Team.

Within T+E, the Agile coaches sit as a small coaching sub team. We are focused on helping teams across Vistaprint adopt an agile mindset. We do this through education, building Agile champions networks, and facilitating and coaching teams. This is all in service of creating highly engaged teams so they can deliver value to customer more quickly.

6.   LESSONS LEARNED WHILE COACHING T+E

- Empathy: understand where the team is, what mindset and cultural norms have been engrained and may be hard to overcome.

- Mindset: start with the mindset. Starting with tactical methodologies that have strict rules can be limiting and overly prescriptive. Instead, start with the basics. How does Agile change the way we think?
- Language: the original manifesto is very heavy with software development terminology. If it will be a barrier to entry for some teams, change it! Language also plays an important role in how you approach trying new things. We find ourselves saying "let's just try it!", or "we'll experiment, we're not committing to this." Language can make a team feel safe to try new things.
- Running experiments and setting expectations: When you introduce change you need to set expectations along the way. For us, we expect input from our employees (feedback loops) so that we can drive our employee-centric strategy of making this the best place to work. We set expectations early and often. We roll out most of our product experiences as "experiments" for learning. It took us a while to get comfortable with this approach but now the team cannot imagine delivering their work in any other way.
- The goal is not about being Agile for the sake of being Agile, it is about continuously improving and being Agile so that we can generate new insights, learn and adapt.

7. CONCLUSION

Looking back, it is hard to believe that T+E's Agile journey started only two and a half years ago while trying to solve for challenges around performance management and the pace at which teams deliver work. In such a short time the team has undergone changes in almost every aspect of how they work: from a reactive to proactive strategy, from working in silos to co-creating with employees, from big bang rollouts to incremental delivery, and from traditional offices and desks to an open workspace with couches! The team also looks quite different from the team in 2015. We have many new members who joined the team excited by the changes and the idea of creating an exceptional employee experience. At the same time, we had several team members leave the team because they were not comfortable with the new ways of working and constant change. This evolution is natural and reflects a change in Vistaprint's mindset and culture as we adopt Agile into everything we do. We are proud of what the team has accomplished and we are excited to see what comes next as they continue their journey.

8. ABOUT THE AUTHORS

This report has been co-created by three Agile Coaches within the Vistaprint HR team (Talent + Experience Transformation Team). However, our Agile stories didn't start there. We each have our own unique Agile journey that brought us together:

Amy Jackson – I've spent my entire career in various HR roles and I've always had a passion for working with teams. At Vistaprint, I started my journey as an HR Business Partner in 2011 and then moved on to lead the HR Project Management Office (PMO). The PMO was responsible for rolling out HR Programs in a thoughtful and consistent way across our global organization. These projects were well-planned and executed, but now, having Agile experience I can't imagine ever approaching work in the way I had previously. My formal introduction to Agile started in late 2016 when I asked if I could join the Agile Coaching Pathway to learn more about Agile. I was interested in this pathway because I had some recent successes working in a different "more Agile way" and I was hungry to learn more. Since completing the Emergn Agile Expert Coaching Pathway I've taken my passion for working with teams and blended it with my interest in exploring how the mindset and practices of Agile might help "non-technology" teams achieve high performance in order to deliver value to customers faster.

Staci Dubovik – I started my Vistaprint journey in 2012 as a User Experience Designer/Researcher, integrating Experience Designers onto Scrum teams, where I was formally trained in Emergn's Value, Flow, Quality (VFQ) Agile education framework. This led

to a new role for the Agency as an Agile Coach, bringing Agile beyond technology while driving positive change and facilitating the adoption of Agile principles and practices for 140 creative employees on 3 continents. I spent 2017 working in our Barcelona, Spain, office where I joined Amy and Melissa in our Expert Coaching Pathway from abroad. I returned to Waltham focused on our enterprise transformation as part of the Talent + Experience team, continuing to inspire champions of agility.

Melissa Rockman – I started within the marketing team at Vistaprint where I spent several years focusing on new customer acquisition and conversion optimization across online channels. This role required daily collaboration with a cross-functional design and development team in order to build and test landing pages. It was on this team that my Agile journey began. We learned about Agile and began implementing some basic Agile principles with the help of two coaches, one of whom was Staci. Within just a few weeks I could feel the effects of Agile: my designer and I started laughing and actually enjoyed working together – something that was previously unheard of! From that moment I knew that there was something magic within Agile. People always ask why Agile appealed to me and it was truly as simple as experiencing how Agile can make teams happier (not to mention we were delivering more value to the customer). When I heard that Vistaprint was looking to hire more Agile coaches I jumped at the opportunity. I wanted to help give back to other teams and show them that working as a team can be fun! Today my favorite part of being an Agile coach is still helping teams work together to deliver more value and have fun along the way.

9. APPENDIX

To learn more about Vistaprint's Agile transformation, see the below resources:
- 2016: Transforming an Advertising Agency: Bringing an Agile Mindset Beyond Engineering
- 2017: The Final Frontier: Aligning the Enterprise's Direction and Your Crew's Efforts
- 2018: A Natural Servant Leader Unlocks the Power of Employees at a Global Contact Center
- 2018 Forbe's article: Transforming HR As Agile Business Partner: The Case Of Vistaprint

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