



The changing role of the Agile Coach

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As organizations continue on their agile journey, they encounter new and different challenges. As a result, their coaching demand evolves. Agile Coaches will need to adapt their coaching plan and objectives. As a result, they need to embrace new skills and competences to remain valuable to the organization.

1. INTRODUCTION

Two years ago, I started as an Agile Coach with a new client. The manager welcomed me and seemed genuinely happy that I joined his department. During our first coffee she told me "we have been doing agile for some time now, so don't worry about the teams. They will do their thing, whether you coach them or not". I was startled. Did my manager just tell me that I was not needed?

This introduction triggered two questions. How will I make an impact in this organization and how will the role of the agile coach evolve in the future? In this report I will share my experience with guiding the organization becoming agile and embracing the agile principles. Further, I will share what that means for an agile coach.

2. BACKGROUND

The organization I was working for was a large financial institution in the Netherlands. The organization is known for their leading position in adopting agile, which make this story interesting for a lot of agile coaches. The challenges that this organization is facing now may be relevant for others in the near future. I worked for two different departments; the first department had around 10 agile teams, a leadership team of four people and three agile coaches. The later department was slightly bigger: 15 teams, a large leadership team and four coaches. Both departments were working with distributed teams. The Scrum master role was not mandatory, so not every team had one. Therefore, the Agile coaches spent, despite the message that I got from the manager, a lot of time with the teams. Coaching on leadership level was also required, as like in many organizations leaders run into problems when making the switch. Most of these problems come about due to unrealistic expectations of how easy it is to implement Agile within a team, department, or the whole company. The report will explain how the role of an agile coach evolved through the various waves of transformation. I will discuss this topic further in the next sections.

3. AGILE COACHING

Agile coaches help organizations implement agile methodology and mind-set. They provide support to agile teams to become more performing. Indeed, organizations strive to build awesome teams that collaborate, create transparency, and are predictable in both quality as well as outcome. They guide teams through their learning by setting goals to promote growth. Ultimately, they equip them with the right knowledge, tools and training so that they'll be able to build great products for their customers.

Some years ago, the majority of organizations were at the start of their agile journey. The 2020 Business Agility Report [Business Agility Report] states that 36% of the organizations have been doing agile for more than three years; 9% of them for more than 8 years. In those early years there has been a strong focus on doing the rituals and events. With that in mind it was logical for agile coaches to have a strong focus on the teams.

When I was involved in my first transformations I focused on the teams as well. Partially because it was new to me and the teams were quite a hand full, and partially because it was expected. “Make sure you get involved in the teams” was a tip I got back then. I believe it characterizes the period where Agile Coaches, were team coaches and did not come in specific flavors.

In 2011 Lyssa Atkins and Michael Spayed created a competency framework for Agile Coaches [Adkins]. The model distinguishes different modes in which the agile coach operates, Facilitating, Mentoring, Coaching/Advising and Teaching. It also introduces three areas of mastery. Agile coaches master different skills and competencies: they can be more technical and geared to help with the technical side, or they are more business oriented on either the technical, business or transformational aspects. Depending on the depth of the domain knowledge, the agile coach gets more involved in providing guidance on the domain they master.

Today, the early adaptors have been on their agile journey for some time now. They face new and more complex challenges. Consequently, their coaching needs have shifted, and the role of the agile coach evolves even further. Catharina Adriaans was leading the group of agile coaches I was in. In an interview with the Agile Marcom Consortium, she stated: Agile organizations that have been working with the way of working for some time need a different kind of coaching. Maybe even other coaches [Adriaans] So let’s have a look at those challenges and gain understanding of how this shape the role of tomorrows coaches.

4. THE THREE WAVES OF AGILE

Organizations are complex systems and every single one follows its own journey. Still, I recognize common patterns. The three waves of agile is an empirical model that I made to understand the transformation journey organization go through. It puts the challenges we encounter in perspective, provides a roadmap for the organization and gives us insight into how the role of the Agile coach is developing. I distinguish three waves.

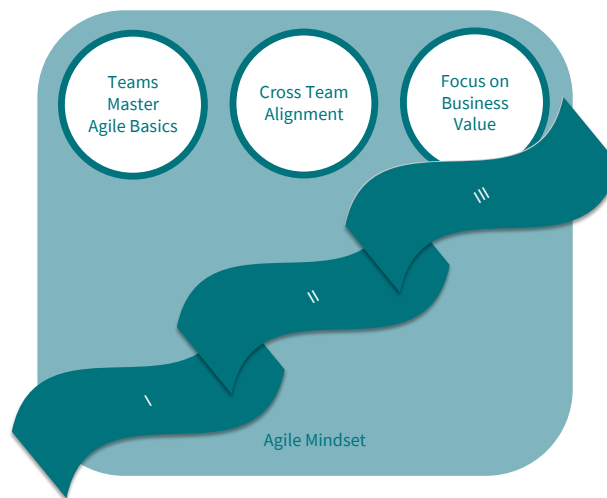


Figure 1: The three waves of Agile. Scope and challenges change when the organization progresses on its Agile journey. The focus on the Agile mindset remains a constant across all waves [Groot].

4.1 The 1st wave: teams master the Agile basics

The first wave of Agile is characterized by a strong focus on teaching and training the teams on Agile and its principles. It is crucial that the teams learn how they effectively implement solutions, speed up and built quality in. If they fail to excel in this core activity, it will impede them in the following waves. It requires adaptation to get used to all the scrum or Kanban events. So, not surprisingly, the initial focus on business value sometimes shifts to the background. Agile coaches work with the teams to explain the agile principles and mind-set. They help them getting routine in the scrum events and stimulate collaboration, experiments and improvements. Coaches address process, team building and technical challenges. Although the coach can address a wide area of topics, I notice that the focus in wave one is primary on the teams.

When the teams have shown that they can deliver completed backlog items and that they're capable of making improvement, the first wave naturally transitions to a new phase. This doesn't mean that Agile coaches and leaders should ignore the teams. Teams will still need attention and guidance. But when the individual teams deliver more value, more impact is achieved by organizing the way the different teams collaborate.

4.2 The 2nd wave: cross-team alignment

In the 2nd wave, the adoption of Agile shifts from a single team focus to a wider organizational approach. To yield value, the work of single agile teams should be integrated and embedded in larger business processes. In this phase, we'll experience the impact of the technical and organizational dependencies that come with complex organizations and systems. Therefore, we don't look so much at the output of single teams but start thinking in releases. Managers of organizations that are in the 2nd wave will see their role change. In the 2nd wave, there's more emphasis on facilitation and leading. It's key to define clear release goals. On the release level, there's a need for portfolio meetings, stakeholder involvement and a test approach.

Agile coaches will find themselves engaged with new activities. They will be involved in strategic and release planning sessions, like roadmap and portfolio meetings. They may suggest measuring the effectiveness of the software development lifecycle and set-up value stream analysis to identify bottlenecks. Typical causes of impediments in the 2nd wave are dependencies, traditional project steering from higher management or cultural legacy. Think for instance about a culture clash between different teams from different departments, or a tendency to built-in slack to hide failures. Organization that aim for value delivery need to have the processes and tools in place and nurture a culture that invites team members to be curious, passionate and entrepreneurial. Agile coaches will thus be shifting their coaching to focus on the different domain knowledge they master best. Accordingly, three perspectives are considered:

- Technical perspective, e.g., when advising teams to embrace development and testing practices like CI/CD, BDD and TDD.
- Business perspective, e.g. when they help the organization to embrace customer faced planning and prioritisation and adopt a 'finish before you start' mentality. Or a more
- Transformational perspective, e.g., when guiding the organization on their agile journey and coach the leadership team in becoming effective leaders.

The 2nd wave is a challenging phase where agile coaches need to master many skills. Individual teams will get less attention as the focus shifts to cross-team challenges. When teams can plan and launch their collectively built release and the focus shifts from realizing technical products to business delivery. This defines the third wave.

4.3 The 3rd wave: business value

In the 3rd wave, organizations retrace to their business and customer focus. In some IT departments, the business value disappears somewhat to the background as the organization is learning to work agile. When the teams master their way of working, it's time to take the next step. Agile is never a goal in itself. Assess the impact that the Agile adoption has on the business results and the ability for the organization to deliver great solutions their customers. This goes beyond putting software on a production environment. The organization should be ready to deliver the product and its operational model and processes should be in place. To maintain pace and flexibility, management will need to show Agile leadership. If not done before, higher management needs to adopt the agile way of working as well. They'll need to set up the performance dialogue and define the appropriate metrics for, e.g., value and predictability.

They'll need to lead the way by explaining the strategic themes, defining the business aim of the next release and helping the product owners prioritize. This makes it possible to have a value-based release planning that includes cross-product dependencies. Dependencies outside the organization may lead to delays or introduce inefficiencies. Leadership should stimulate raising these global impediments and take an active role in influencing both the upstream and downstream collaboration partners.

When organizations enter the 3rd wave Agile Coaches will notice that the demands from the organization grow even more versatile. Leadership coaching will be more prominent; the step from technical towards business release requires involvement from the operational departments as well. This surely impacts the agile coach. How this role evolves will be explained in the remaining chapters

5. NEW SKILLS AND COACHING AT DIFFERENT LEVELS

Organizations that move beyond single team agile and enter the second or third wave, encounter new challenges. Logically the coaching needs shift as well and with that the activities and demands for the agile coach.

Two more examples. In the first wave it is important that the team understands the agile roles. When doing scrum, the focus lies on understanding the Developers role and that of the Product Owner and the Scrum master. The way the team fits in the organization context comes a little later. I experienced that that traditional management needs to get used to autonomous teams and often some role conflict surfaces. So, I needed to learn how to moderate role discussions and work with the managers that were in transition towards their new leadership role.

Another example is collaboration. Starting teams often need to learn how to collaborate. I see many teams that work together but do not really collaborate. Coaching in this setting naturally focuses on teaching the team members to ask help-questions and have a collective responsibility for meeting the sprint goal. The initial focus lies on the dependencies that are within the team and how they are addressed during e.g., the stand-up meeting. In a later stage we see the focus shifting to cross-team collaboration and managing the cross- team dependencies.

Agile coaches should have a focus on cultural and mindset factors that influence effective collaboration and can introduce tools to make dependencies transparent. For example, by introducing story mapping and a program planning board. The agile coach can even be asked to help out in making cross product dependencies transparent and may be facilitating cross department release planning.

6. SCALING UP COACHING WITH LIMITED RESOURCES

In our center of expertise, we had an interesting dialogue about this situation. We acknowledged that Agile coaches should be become familiar with new tools. That they could make more impact when they facilitate events on a higher level in the organization. New areas of attention are added to the working pallet of the coach and range of topics gets wider. The skills and knowledge that the agile coach should master get richer and more complex. The level he or she operates shifts from team to department and yes, even Enterprise level. But, with so many topics to cover Agile Coaches have less time to help out the teams. I discovered that while we were helping the leadership team and were active on a department level, it was impossible to attend every team's standup, retrospective or planning meeting. In a presentation for the agile coaching community, I described the following scenarios:



Figure 2: The three scenarios

There is a lot of discussion about the difference between Scrum masters and Agile coaches. A useful definition is given by Vyras Butkus: "A Scrum master is a type of Agile coach", he states, "A Scrum master works to implement Agile on a team level, while the Agile coach works on the Agile transition of the whole company."

[Butkus]. In line with this distinction, I pleaded for growing the Scrum master role and indicated that in order to do this effectively we should make the role explicit.

We created a clear role description to create role-clarity and manage expectations with teams, leadership and the scrum masters themselves. This role description was accepted on a global scale and I worked with a group of agile coaches to define an approach that could be used by the various departments to grow their Scrum masters. The Scrum master growth plan is currently widely adopted and gets top priority in the various departments. We are actively investing in ensuring that the team gets the support they need. Execution of the plan will absorb some coaching time on the short time but will free time for agile coaches in the long run. Aim of growing the Scrum master role is to free up time to better support the organization. For this we need to understand the needs of the organization and prepare to have coaches aligned to deliver. In addition to the masteries by Atkins and Spayed, I defined three Agile Coach profiles that define the role of the agile coach in the 3rd wave of agile. These are:

The **Delivery Coach** has a strong focus on optimizing the flow of the development process. In order to increase the delivered business value, the Delivery Coach will identify bottlenecks, replace local optimizations for more generic solutions and build quality into the software development lifecycle. He or She sits with the team to help them automate deployments and testing and to embrace development practices like BDD and TDD. But the delivery coach will also explain the importance of this to the leadership teams, so they support the teams towards their technical excellence.

We have experienced that despite the remark made by my manager, “the teams will do their thing”, teams still need help to grow their agile maturity and business impact. Therefore we distinguish the role of the **Team coach**. The team coach works close with the team, PO and the Scrum master. The team coach helps the different teams to identify improvements and supports the scrum masters in their ambition to help the teams forward.

The role of leadership is often seen as the biggest challenge in having a successful agile transformation. A leader sets the tone for the entire organization. Leaders should communicate what agility means for their organization and be an example by adopting agile values and practices. The **agile counselor** does not focus that much on the development process as the Delivery Coach but aims to empower leadership. He or she has an eye for the health of the teams and will address ‘bad smell’ with the leadership team. The counselor coaches the leaders on their agile mindset, e.g., by pointing out when old-school thinking and behavior has a negative impact on the performance and delivery.

These three profiles bear similarities with Adkin’s areas of mastery. Both distinguish between technical and transformational support. The delivery coach has some commonalities with the technical mastery, but rather than having a team focus, he/she will also act on leadership level to create awareness and commitment for technical excellence. While doing this, he/she plays a crucial part in the Agile transformation. The Agile counselor works with the leadership team, which requires business mastery as well as transformational skills. A team coach preferably supports the team by offering technical support and coach on the process and Agile mindset. Being part of the coaches’ team, he/she will actively participate in the transformation as well.

We saw that team coaching will never completely disappear, but when we move towards the 3rd wave, there is a shift towards the other two types. It’s important to understand the needs of the organization, in order to have the right mix of coaches available. Have an internal discussion about the skills and knowledge needed for each profile and develop a learning path for the agile coaches to master the required skills and knowledge.

Discuss the personal preferences. The coaches that I discussed these profiles with clearly preferred a role. Some immediately saw themselves as team coach, other would like to be more technical involved or had the ambition to coach from a leadership perspective. The profiles trigger us to think about different aspects of agile coaching and define our own growth and development path.

Additionally, the three profiles can be used to align demand by the organization and coaching services that we deliver as agile coaches. The large financial institution in the Netherlands I worked for is entering a next phase. It has become clear that in order to succeed the agile coaches and leadership will need to work closely together. The three profiles each have their own focus and look at the organization from a different perspective. The three profiles provide the different but complementary perspectives that are needed to support the transformation. After I defined the profiles, I mapped them on the leadership team. It suddenly became clear that on leadership level there was attention for team building and improvements. But the aspects of the delivery coach were under emphasized. The model helps thus to get these insights on the table.

Last but not least, the profiles can be used to elicit the coaching demand and needs of the organization. When we get a coaching request, we can use the profiles to clarify the request. It will create awareness within the organization. We do not deliver 'just an agile coach'. We help the organization making its agile journey. This requires coaching from different perspectives and the challenges will change along the way. As personal preferences and skills differ, so will the coach that is best suited to contribute.

7. WHAT WE LEARNED

The remark made by my manager on the first day of my new assignment let me think about how agile coaches deliver value. It made me see how the challenges of the agile adoption change when the organization makes progress on their agile journey. Logically the work of the agile coach changes as they get to assist and coach in new settings and situations. As my agenda filled with extra meetings, it became harder to assist the teams. We adopted the role of the scrum master so the teams can get support on the process, and the agile coaches can free time to guide the organization in their next step. To do this properly we revisited the delivery model and assessed what skills and knowledge are needed. The three perspectives provide guidance for the agile coaches and the leadership team to align the coaching needs and delivery. They help to get a better view on the role of tomorrow's agile coach. The organization I refer to in this report is about to make that step, and other organizations will benefit from the insights this will yield. Important because in order to make the next step in the agile journey agile coaches and leadership will need to work closely together.

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