STUCK IN THE MIDDLE (WITH YOU)
Beyond the Product Team
I serve a team of 140 consultants that are all passionate about Coaching, Product, and Agile Delivery. I’m a practitioner at heart and I love this stuff because it changes lives.

Mine included.
WHERE WE’RE HEADED TOGETHER

Quick Agenda

- What I Do, Who Buys The Work, & Who Is Impacted by It
- Success Factors of Transformational Work
- A Little Empathy Building for Our Partners
- A Real-Life Experiment with 30 Cross-Functional Leaders
- We’ll Fly Thru a Bunch of Tools Together
- We’ll Summarize the Outcomes of the Experiment
- I’ll Challenge you to Apply What You Saw to Your World
- We’ll Explore Questions if You’ve Got ‘em
## WHAT I DO

Help Folks Work in New Ways

<table>
<thead>
<tr>
<th>FROM</th>
<th>TO</th>
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<tbody>
<tr>
<td>PROJECT</td>
<td>PRODUCT</td>
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<td>Architect</td>
<td>Local solution</td>
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<td>Emphasize</td>
<td>Requested solution</td>
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<td>Decision-making</td>
<td>Siloed &amp; short-term</td>
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<td>Attitudes</td>
<td>Scarcity/mistrust</td>
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<td>Scope</td>
<td>Large &amp; static</td>
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<td>Outcomes</td>
<td>Predicted</td>
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<td>Time to value</td>
<td>Long</td>
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<td>Actual risk</td>
<td>Higher</td>
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<tr>
<td>Teams</td>
<td>Temporary</td>
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### WHAT I DO (CONT.)

**Drive Far-Reaching Change**

<table>
<thead>
<tr>
<th>PEOPLE</th>
<th>PROCESS</th>
<th>TECHNOLOGY</th>
<th>DATA</th>
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<tbody>
<tr>
<td><strong>THE FOUR I’S</strong></td>
<td><strong>PROCESS REVIEW</strong></td>
<td><strong>ARCHITECTURE</strong></td>
<td><strong>ASSESSMENT</strong></td>
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<td>• Inform</td>
<td>• Strategic Prioritization</td>
<td>• Current State</td>
<td>• Data Health</td>
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<tr>
<td>• Inspire</td>
<td>• Planning Routines</td>
<td>• Desired State</td>
<td>• Operational Metrics</td>
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<td>• Invite</td>
<td>• Core Dev Practices</td>
<td>• Gap Analysis</td>
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<td>• Invest</td>
<td>• Funding</td>
<td>• Gap Prioritization</td>
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<td><strong>UPSKILLING</strong></td>
<td><strong>NEW WAYS OF WORKING</strong></td>
<td><strong>DEVOPS</strong></td>
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<tr>
<td>• Team &gt; Individual</td>
<td>• Establish Product Toolbox</td>
<td>• TDD</td>
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<td><strong>COACHING</strong></td>
<td><strong>TECHNOLOGY</strong></td>
<td><strong>TOOLS</strong></td>
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<td>• Leadership</td>
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<td>• Source Code Mgmt</td>
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<td>• Skills</td>
<td>• Funding</td>
<td>• CI/CD</td>
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<td><strong>HR</strong></td>
<td><strong>DATA</strong></td>
<td><strong>TEAM DATA</strong></td>
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<td>• Roles &amp; Resp</td>
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<td>• Business</td>
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<td>• Taxonomy</td>
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<td>• Technical</td>
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<td>Definition</td>
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<td>• User</td>
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**CLEAR WHY**

Our first step is to get crystal clear on the 'Why' behind your transformation and how we’ll measure success.

We will use that vision to gain alignment across our Sponsor(s) and Senior Leadership.

The vision will feed our strategy. While we have a tried-and-true approach, we recognize that every large-scale change is different. One size does NOT fit all.

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**STRATEGY & APPROACH**

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WHO NORMALLY BUYS WHAT I DO

Senior Leaders Under Pressure

SPEED
QUALITY
EFFICIENCY

ROI
REVENUE
< COST
WHO NORMALLY GETS TRAINED
The Dev Teams / Delivery Org

PROBABLY THE PO

NEW WAYS OF WORKING WITH AN EMPHASIS ON DELIVERY
The need to lead with a Product Mindset is not limited to the Product Management job family.

In fact, in order for newly established Product Leaders to succeed, they need support from leaders across the company. This stuff impacts everyone.

Exclude any of these other groups from the organizational evolution and you’ll unintentionally create obstacles for your effort.
WHAT IT FEELS LIKE TO THOSE STAKEHOLDERS

Not Brought Along, but Sent to Agile Training as part of “Transformation”
ALTERNATIVE: HELP THEM SOLVE THEIR PROBLEMS (NOT YOURS)

Doesn’t Matter What Group You’re In, Something Has You Stressed

3 E’S OF PERSONAL / TEAM DEVELOPMENT

- Concepts & Tactics Apply to Everyone
- Fills Holes in Current Leadership Training
- Ancillary Benefits for Cross-Functional Collab
- Adds Real Value for Learners
- Everything Founded in Product Principles
Lack of alignment across functional areas
Low flow & blame games
Perceived lack of empowerment in most areas of the org
Recognition that they had made silo’d investments
Low people leader engagement scores on internal surveys

Training Sponsored by Company President(s) and Positioned as Enterprise-Level Leadership Training
RECENT EXPERIMENT (CONT)

Mortgage Client – 30 Leaders – “Leading with a Product Mindset”
RECENT EXPERIMENT (CONT)
Remove the Jargon (Mostly), Focus on Shared Values & Practical Tools – Inspire Ownership

FOUNDATIONS
- Group Vision & Culture
- Clarity of Vision
- Measuring Aspects of Delivery
- Local v. Corporate Culture
- Communication
- Team Connection

ENTREPRISE
- People Leadership
- Roles & Responsibilities
- Performance Mgmt
- Personal Development
- Team Connection

2 Days in person
6 additional weeks of follow-on group sessions & coaching (~3 hours per week)
THE HOW: MINDSET FIRST, TACTICS SECOND.
Leaders drive toward shared values. Shared values drive new behaviors. New behaviors (and tools) drive change.

For our:
▪ Customers
▪ Teammates
▪ Stakeholders
▪ Shareholders
▪ Partners

For:
▪ Our product
▪ Our role
▪ Our domain
▪ Learning
▪ Innovation

About:
▪ Product ideas
▪ What’s next
▪ Finding problems worth solving
▪ Our competition

We assume we are wrong until proven right
We give each other grace as we learn

We:
▪ Empower teams
▪ Operate w/ urgency
▪ Action over talk
▪ Experiment quickly
▪ Value outcomes over output
▪ Deliver small pieces of work often

We:
▪ Have shared:
  - Purpose
  - Vision
  - Identity
  - Values
▪ Have audacious goals
▪ Make personal connections
▪ Pursue excellence

We:
▪ Have the courage to make decisions (aka saying no)
▪ Know we can’t serve everyone and we’re unapologetic about that fact

We define culture as a shared set of values (what we care about), beliefs (what we believe to be true), and norms of behavior (how we do things). Cultures exist to align effort, engender shared understanding, increase predictability, and help each of us show up as our authentic selves in a safe environment.
PRACTICAL USES FOR THE VALUES

Three Levels – Enterprise, Group, Personal/Team

REFLECT: WHICH OF THESE GRABS YOUR ATTENTION? WHY?
Discuss at Your Table (or Work Independently Online)

FROM VALUES TO ACTION
Shifting Away from the Abstract to Tackling Areas of Dissonance

AS LEADERS, WHAT SPECIFIC BEHAVIORS AND ACTIONS MUST YOU COLLECTIVELY TAKE TO ENSURE YOU, YOUR TEAMS, & YOUR PROCESSES REFLECT SIMILAR VALUES?

WHAT POTENTIAL BLOCKERS ARE IN YOUR WAY? ARE THEY REAL OR PERCEIVED?
3 E’s of Personal / Team Development

Proactive Steps Will Help Minimize the Need for Reactive Steps

**EXPECTATIONS**
Make sure folks understand the group’s Why and how they are expected to show up.

**ENIRONMENT**
Lead by example and create a safe learning environment within your team.

**EXECUTION**
Accountability as a carrot, not a stick. How well have we moved ourselves toward our vision?

**TOOLS**
- Charter (Team)
- Skills Matrix, R&R
- Individual Learning Plans

- Psych Safety & EQ
- Operational Value Stream
- Improvement Backlog
- Connection Routines

**HYPOTHESIS**
The majority of your reactive issues will tie back to short-comings in your 3E proactive work.

**Shared language**
When the entire org begins to focus on outcomes, it will help your product teams operate in new ways.
PRODUCTIVE EMPOWERMENT REQUIRES CLARITY
Charter = Team-Level Clarity, Aligning Around Why We’re Here

EXPECTATIONS
Make sure folks understand the group’s Why and how they are expected to show up.

- CHARTER (TEAM)
- SKILLS MATRIX, RGR
- INDIVIDUAL LEARNING PLANS

TOOLS

A simple deck can be a great way to summarize the key points of the discussion and serve as both an ongoing reference for the team, and a marketing tool for their work.

A collaboration tool like Mural...
Cultures that are Marked by a Growth Mindset Don’t Happen Accidentally

Coaching Skills Inventory

Make sure folks understand the group’s Why and how they are expected to show up.

- CHARTER (TEAM)
- SKILLS MATRIX, RGR
- INDIVIDUAL LEARNING PLANS
As a Leader, You Drive Your Local Culture – Make it a Safe One

**ENVIRONMENT**

Lead by example and create a learning environment within your team

- Psych Safe Eval & EQ
- Operational Value Stream
- Improvement Backlog
- Connection Routines

**TOOLS**

1. People at this organization are able to bring up problems and tough issues
2. I feel safe to take a risk in this organization
3. It is difficult to ask other members of this organization for help
4. No one at this organization would deliberately act in a way that undermines my efforts
5. Working with members of this organization, my unique skills and talents are valued and utilized
6. If I make a mistake at this organization, it is often held against me
7. People at this organization sometimes reject others for being different

Note: Scoring needs to take into consideration that you are looking for positive responses for some and negative for others. (see color coding)

Credit: Amy Edmondson, The Fearless Organization
EMOTIONAL INTELLIGENCE
Don’t Get Hijacked by the Stress of the Day-to-Day

ENVIRONMENT
Lead by example and create a learning environment within your team

- PSYCH SAFE EVAL & EQ
- OPERATIONAL VALUE STREAM
- IMPROVEMENT BACKLOG
- CONNECTION ROUTINES

TOOLSTHINK
PRE-FRONTAL CORTEX

HIGHEST RISK FOR GETTING HIJACKED
PROCESSING REALITY & YOUR OPTIONS

- EQ
- IQ

STIMULUS

REACT
AMYGDALA

FEEL
LIMBIC SYSTEM

RESPONSE
EMOTIONAL INTELLIGENCE

Don’t Get Hijacked by the Stress of the Day-to-Day

ENVIRONMENT

Lead by example and create a learning environment within your team

- PSYCH SAFE EVAL & EQ
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TOOLS

"OH SH*T! FREEZE!

"HEAVY BREATHING MUSCLES TIGHTEN

"OH, THAT’S A ROPE.

"HOW CAN I SURVIVE A SNAKE BITE ON A MOUNTAIN??"
"WHAT CAN I FIND TO KILL IT WITH?"
"HOW CAN I PROTECT THOSE AROUND ME?"
"HOW ARE THE KIDS GOING TO SURVIVE WITHOUT ME?"
"WHO IS GOING TO SUCK THE VENOM OUT OF MY ANKLE?"

THE ROPE DIDN’T CAUSE HER STRESS.

THE STORY SHE TOLD HERSELF ABOUT THE ROPE DID.

WHERE ELSE DO WE DO THIS?
Leadership = Understanding the System & Constantly Optimizing it for the Team You Serve

**ENVIRONMENT**
Lead by example and create a learning environment within your team

**TOOLS**
- Psych Safe Eval & EQ
- Operational Value Stream
- Improvement Backlog
- Connection Routines

CONTINUOUS IMPROVEMENT
RETROSPECTIVES
Consistent Reflection in the Spirit of Continuous Improvement

EXECUTION
Accountability as a carrot, not a stick. How well have we moved ourselves toward our vision?

TOOLS
• PERSONAL & TEAM REFLECTION
• MEASURE OUTCOMES & IMPACT
• ITERATE

CONTINUOUS REFLECTION
• PEOPLE
• PROCESS
• DATA
• TECHNOLOGY

A simplified example of the Sailboat Retro

HOW WE OPERATE IS AS IMPORTANT AS THE PROJECTS WE DELIVER
DEFINING VALUE WITH NEW LENSES

Output, Outcome, and Impact*

EXECUTION

Accountability as a carrot, not a stick. How well have we moved ourselves toward our vision?

TOOLS

- PERSONAL & TEAM REFLECTION
- MEASURE OUTCOMES & IMPACT
- ITERATE
\[ \text{RESULTS / FEEDBACK} \]

A Third, A Third, A Third - Loosely

“\text{I can say beyond a shadow of a doubt that your sessions and materials provided a plethora of incredible guideposts and made me rethink my approach to leadership...}"

It helped my co-leader and I take a new look at the dynamics of our CX team and reconsider how best to build on the strengths of every individual in order to drive engagement and meaningful contribution...”

- CX Leader

“\text{You helped to give me permission to stop waiting around. I know all too well that we can’t control anyone else’s actions – only our responses.}"

Somehow that hadn’t connected to work, but with your help, I can see more than ever that I’ve been waiting for someone to give me permission and assume that I have to copy the “culture” here. Not anymore.

I think I’ve got more productive work done in the last two months than I have in the past year.”

- L&D Leader

NPS of ~45 (on a scale of -100 to 100)
WHAT I’D DO DIFFERENTLY

“Mmmm, Perfect, It Was Not”

- **Shorten it up and do it all in-person if possible**
  - IF NOT IN PERSON, CONDENSE TO A FEW HALF-DAYS

- **Ensure that the Sponsors go thru the class with their leaders**

- **Continue a cadence of follow-up with all participants**
  - I HATE NOT KNOWING HOW THEY ARE DOING
Who Should Be Delivering this Content?
- C.O.O. <?
- ENTERPRISE STRATEGY <?
- TRADITIONAL L&D <?
- PRODUCT/TECH <?
- AGILE/PRODUCT COACHES <?

What Would Provide Add’l Value? Where Are the Gaps?
- TACTICS FOR BREAKING DOWN WORK ARE LACKING
- COACHING UPWARD <?
- <INSERT YOUR IDEAS HERE>
IMMEDIATE ACCESS TO ALL THE THINGS
Handy Dandy Mural Board with Embedded Tools & Learning Resources
QUESTIONS???

QUESTIONS ARE MY FAVORITE

LET’S YAP (& CONNECT)
They pay me to do stuff I love.