Agile leadership for change initiatives

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Introduction

It is impossible to ignore the popularity of Agile approaches as organisations seek to increase their speed to market, adapt better to changing priorities and increase their productivity. In many cases Agile approaches are limited to IT development and marketing initiatives but I think there opportunities to apply Agile principles and techniques to how we manage business change.

In this paper I will explain how Agile principles provide the fundamentals of an effective approach to creating and adopting new ways of working. This cross pollination shows how the well-known Agile software development methods can be used to generate an 'agile organisation' which prioritises 'fast to market' or 'early delivery' of new ideas without the need to plan every aspect of the change in detail at the start.

This 'organisational agility' is wave 2 of the Agile phenomenon, viewed by many executives as the only way to operate during the current high levels of innovation, change and uncertainty that we are all experiencing.
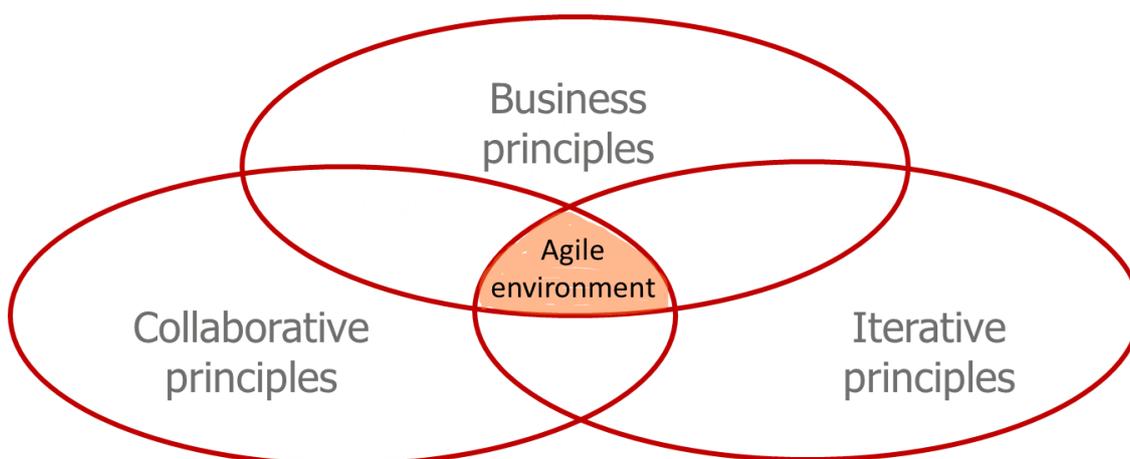
Agile principles

Whist there are a number of different Agile methods including Scrum, AgilePM® and SAFe® (Scaled Agile Framework) they have all sought to codify the fundamentals of their approach in a series of principles.

These principles can be grouped into three broad areas, each of which creates benefit for managing business change:
- Business principles – understanding what constitutes business value
- Collaborative principles - working together to achieve business value
- Iterative principles – deliver business value in short cycles

Business principles
AgilePM® has the principle of 'Focus on the business need', Scrum has 'Value based prioritisation' and SAFe® has 'Take an economic view'. What these all have in common is the importance of
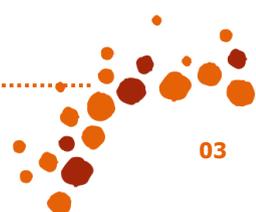
understanding at the most basic level what sort of improvement the work is going to deliver, and how strategically important this improvement is. Without the ability to assess this value, it is impossible to decide what aspects of the work are really important and which aspects are 'nice to have' but not essential.

In any change initiative, there are so many inter-dependencies that it is often difficult to get started, because each change triggers many consequences. A clear understanding of what is important to the organisation, in terms of commercial value and benefits to customers and employees is vital in cutting through this hesitancy. By evaluating potential changes against the same benefits criteria it provides those who have to change their ways of working with an ability to identify the 'top priority' items.

It is this business value that can generate motivation and enthusiasm for the change as those impacted can appreciate how their work will become easier or their working environment will become more pleasant.

Collaborative principles

AgilePM® and Scrum have the principle of 'Collaborate/Collaboration' whilst SAFe® has 'Decentralise decision making'. This recognises that it is vital to involve the business in creating the project deliverables as they will be the ones using them. Collaboration also involves empowering those with the knowledge to take decisions, in place of those with the hierarchical authority to take decisions.

This Agile view of collaboration and empowerment is essential in change, because change only happens if those impacted are willing to work in new ways. Lasting change cannot be imposed on people, as they will direct their energies to finding ways to work around it. Collaboration is a partnership between those helping to create the changes and those who will operate them, which over time has to move from the motivation of the creators to the buy-in and ownership of those affected by the change.

Iterative principles

AgilePM® has the principles of 'Build incrementally from firm foundations' and 'Develop iteratively', Scrum has the principle of 'Iterative development' and SAFe® has the principle of 'Build incrementally with fast, integrated learning cycles'.

These iterative principles recognise the constraint of establishing detailed requirements up front, preventing the results from early changes shaping the next changes. Agile encourages everyone to remain open to the possibilities for as long as possible, before selecting what action to take. This pragmatic response to uncertainty aligns to the need to 'nudge' change in the right direction based on new information.

Introduction to Agile techniques

There are a number of well-known customs and practices, claimed by the latest Agile methods but often owing their origins to the work of great thinkers including W. Edwards Deming, Peter Drucker and Peter Senge etc.

I am going to explain how the most frequently used Agile techniques can apply equally as well to a business change initiative as they can to the creation of software or marketing campaigns. These techniques are:

- Sprints – also known as timeboxes, these are short bursts of effort, planned and executed in a fixed period of time, often 2 weeks.
- Kanban – this means visual signal in Japanese and is a simple to use approach for tracking the progress of work
- User stories – a way of capturing a requirement in a format which emphasises what the benefit or value will be
- Daily stand ups and retrospectives - the two most common meetings or ceremonies occurring within Agile methods
- Show and Tells – the name given to the frequent demonstrations that generate feedback on what has been created so far and ideas for what needs to be created next.

Working in sprints

Sprints are short, focused periods of work, often 2 weeks long but sometimes up to 4 weeks. They are as long as is needed to achieve some meaningful work but not so long that they lose their momentum and focus.
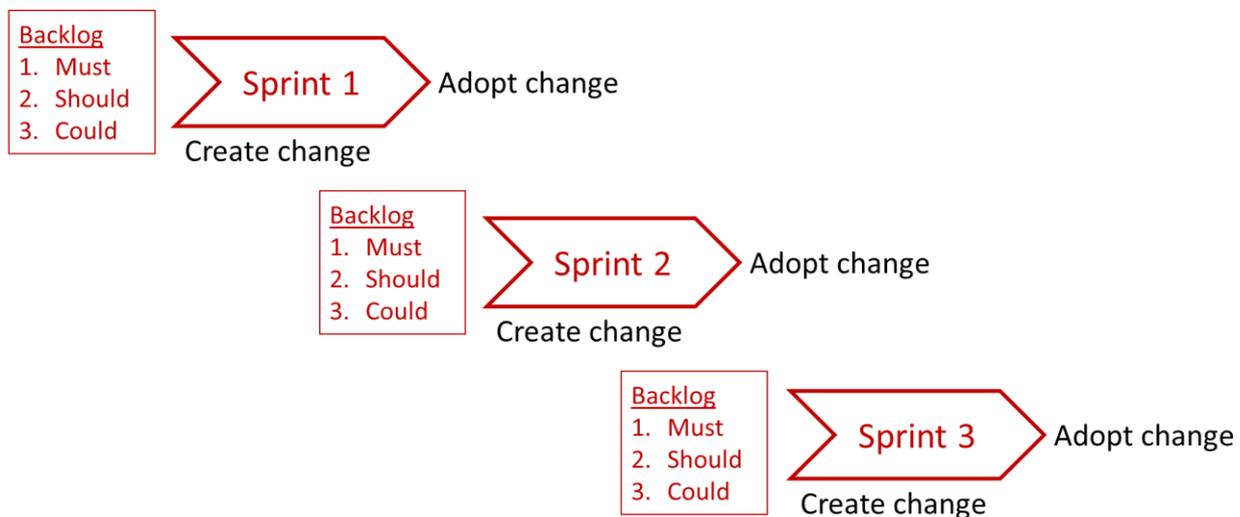
All of the work needed to make the change happen is captured in a 'backlog' in priority order, with the most important changes the ones that contribute the greatest business value, and the least important those activities which would be nice to do but not essential.

Using sprints to divide up the work leads to regular re-planning as after each sprint, those involved review what difference their work has made, and use this knowledge to prioritise what changes to make next.

This is more 'honest' than having a detailed plan at the start of the change, because nothing ever goes according to plan and sprints give the opportunity to plan at the detailed level only at the point that the work is going to start rather than a long time in advance.

Delivering change in short bursts has the advantage of keeping each change relatively small so that it is easier to absorb into business as usual. The disadvantage is that the business has to adjust to change on a more frequent basis than it might be used to.

Using Kanban

Kanban is a simple technique for visualising the work involved in making change happen. There are 3 columns: To Do; In Progress; Done. Each task is written on a sticky note, and these notes are moved from column to column as the work progresses.
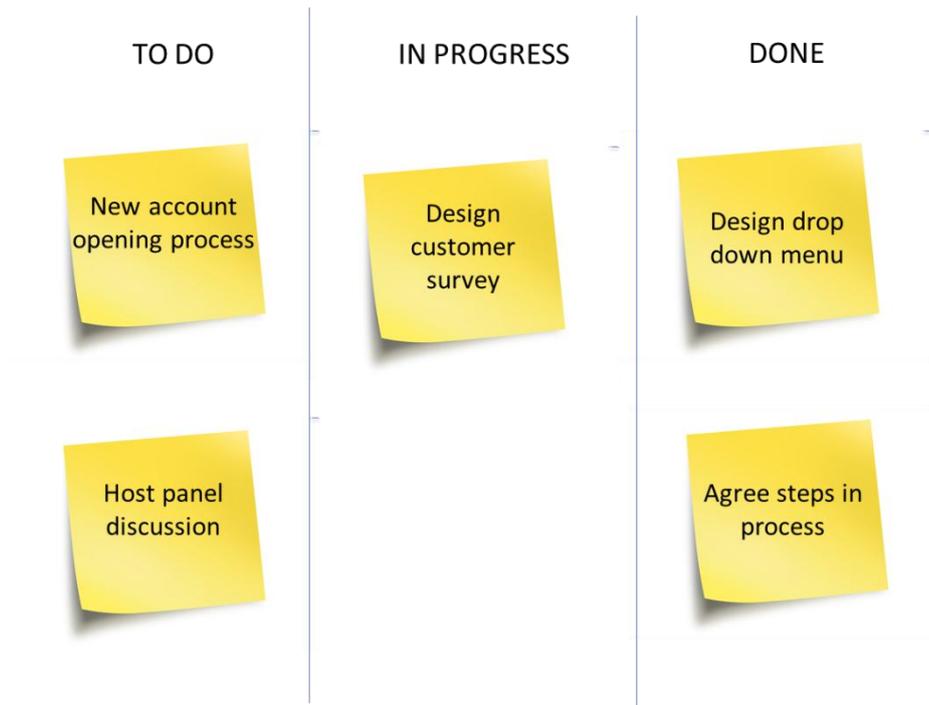
I think there are four advantages to using Kanban to track the progress of change:

1. As it is visual, everyone can see what is waiting to be delivered, what is currently underway and what has been completed as simple tasks. This is important when change doesn't feel tangible, and people are not sure what it really involves.

2. This visual tracking also helps to identify when something is not progressing so that there can be an honest discussion about why nothing is happening. Often it is because 'business as usual' is taking precedence over changing ways of working so using Kanban along with Sprints means this blockage is likely to seen within days when it is easier to address.

3. Kanban encourages the use of 'work in progress' limits, where those doing the work agree how many tasks they can reasonably work on at any one time. This stops lots of work being started and then getting put on hold as the team are too busy to finish anything.

4.   In order to complete the work, there has to be a discussion amongst the team about what 'done' means. Before they start work they all agree what needs to happen to ensure that any change is complete. For example, if a process needs to be reworked to add in additional steps to satisfy a new legal requirement, 'done' might include the new activities, metrics to track the impact of the new activities and a checklist of questions for supervisors to use when approving the outputs from the new activities.

This visual technique enables 'creators' and those who will have to work in new ways to see what is happening and to make their own preparations to smooth the adoption of change.

Creating user stories

User stories are requirements written in the format of:

As A ……name of role

I want…..what needs to change

So that…..benefit or improvement resulting from the change

The 'As A…' aligns the requirement to a specific stakeholder or stakeholder group so there is a clear ownership from the start. It is also means that the scale of impact on different stakeholders can be easily assessed, and potential overload identified early. It also shows very clearly when stakeholder groups are under-represented in the change.

The 'So that….' is a great way of communicating why certain things need to change because it forces the person requesting the change to explain what difference it will make or what it will enable them to do that that they cannot do at the moment.

The value of 'daily stand-ups' and 'retrospectives'

Agile is a mind-set, which relies on individuals taking responsibility for their own work, whilst working closely with others to evolve the best solutions.

Daily stand-ups are also known as daily scrums, where all those working on the change come together to give a brief update on what they have done since the last stand-up what they are working on between now and the next stand-up.

The purpose is to provide up to date information, ensure that everyone knows what everyone else is working on so that it is easier to collaborate, to identify and resolve dependencies, risks and issues. The meeting helps the team get things done, and minimise the need to escalate to senior managers.

Retrospectives are another type of team meeting which also encourages team empowerment and personal responsibility. The team gets together at the end of a sprint to review what has been created, and to discuss how the team worked together. The emphasis is on improvement, which can cover any aspect of the work, the relationships, the skills of the team etc. The value of the

retrospective depends on the questions asked and the willingness to share honest feedback with each other. This emphasis on continuous improvement closely aligns to working in sprints, because each sprint is an opportunity to apply the lessons learned from the previous sprint.

These face to face meetings suit change situations well because it is often difficult in formal reports to capture the blockages and difficulties which are much more easily expressed and solved conversationally.

Creating engagement through 'Show and Tells'

This is the common term for a demonstration, and is closely aligned to the concept in Agile of reporting achievement and not activity. Show those affected what will be different, what you have created for them to use in their work rather than deliver presentations that talk hypothetically about what will be different.

These Show and Tells require facilitation and presentation skills, and a clear desire to engage with stakeholders to help them experience the change as it is being developed. The purpose of a Show and Tell is to get immediate feedback from those who are going to work differently, finding out what will work and what will need to be amended to enable the change to be adopted.

Conclusion

Experienced change professionals would argue that effective change has always been agile. Change is an unpredictable journey full of side effects and consequences that must be incorporated. I agree with this view but I also think there are useful lessons to be learnt from the intuitive nature of the agile techniques and the benefits many teams experience from establishing their principles and therefore their culture up front.

Agile and change approaches are complementary, not competing and in this uncertain world we need to incorporate any and all beneficial ideas.