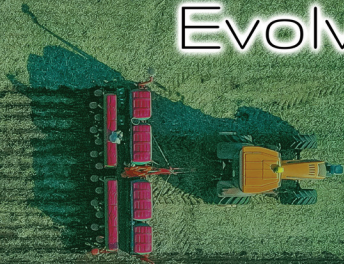# Evolve Agility

How Evolve Agility
Coached A Leading Wholesaler
To Coach Itself.

*Embracing Company-Wide Agile Transformation
From Internal Coaches*

CASE STUDY

BACKGROUND

Up until 2016, a leading food wholesaler had established a standard projects-based "waterfall" operating model as the delivery methodology for their Business Technology (BT) department. Project Managers sourced people to temporarily staff projects, while business involvement in technology development was limited to gathering requirements and delivering the projects. However, the company's BT leaders saw one of their contract partners using Agile for a major software delivery initiative, and was intrigued enough to try their own experiment. That year, they created two new "Pathfinder" teams to experiment with Agile ways of working.

Each of the Pathfinder teams had stable membership, with a dedicated Scrum Master and Product Owner. External Agile coaches were assigned to work with each of the team roles -

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93

with at least three Agile coaches per Pathfinder team of 6-8 people. The Pathfinder teams proved that Agile could be implemented within the company's BT department. However, the external coaching model, requiring one agile coach for every two or three people, proved to be too expensive to scale across the rest of BT.

However, the Pathfinder teams experienced early business successes, as the cross-functional teams delivered work more efficiently with fewer dependencies. These early wins helped elicit executive buy-in for a full-scale Agile transformation.

One of the Big 5 consulting firms was brought in and they developed the business case and the execution plan of the agile transformation project. The effort involved 12 external consultants, training 5 - 10 newly-minted internal "coaches" over an 18-month period during 2017-2018. The business case, approved by the Board of Directors, was based on delivering cost-savings resulting from the agile transformation. Managers and staff were incentivized based on the number of agile teams they trained and launched.

An agile training curriculum was developed to support the transformation, and dedicated office space was secured for a boot camp. To train people and teams on agile ways of working, the consultants established a rolling-wave deployment program.

Within the next twelve months, 93 teams were trained and "launched."

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FAILURE

Based on the consulting group's recommendation, the wholesaler attempted to conduct the transformation simply by training teams and executing as a waterfall project, with targets for numerous teams to be launched over the following months.

Unfortunately, this resulted in a push where existing groups were "lifted and shifted" to perform agile practices. Trying to fit every team and department into Agile ways of working alienated some; others viewed the internal coaches as "Agile police."

"Their focus was on how to train teams. They were coaching us on how to be trainers, not on how to coach people to be agile. We weren't getting that experience and knowledge," the company's Agile Capability Owner for Agile Enablement.

In the rush to launch agile teams, the internal "coaching" group did not have time to connect and reflect as a team or with other agile teams. This strained relationships and negatively impacted results.

When it became apparent that the promised benefits would not materialize, the consulting company was removed from the effort in late 2018.

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ROUND 3

A DIFFERENT APPROACH

In early 2019, Evolve Agility was asked to step in and support the transformation. The enterprise was at a point where "the path and roadmap dictated for us to take it on our own. In other words, we own it," the Director, Head of Agile Delivery, Technology Quality Engineering and BT Studio. "It was a transition from external to internal."

To achieve this, we had replaced the previous company's 12 consultants with a pair of our senior agile coaches.

STRATEGIC ALIGNMENT

At Evolve Agility, we take a structured approach to transformations, striving to meet our client organizations where they are. Although we teach our clients to use disciplined techniques to maximize positive impact from coaching, training, and organization systems redesign, our method strikes the right balance. We grow internal capabilities and increase capacity from within, allowing us to have more impact with fewer coaches.

After meeting with senior leadership, Evolve Agility's coaches initiated an enablement approach, employing the following strategic choices:

- ◆ Establish a 'Pull' model for supporting Agile teams
- ◆ Develop internal Agile coaching competencies
- ◆ Encourage acts of leadership at all levels

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STRATEGY

Since the company had more than 90 agile teams, and a small staff of eight internal agile trainers/coaches, we could not hope to disperse and make an impact. The 'spray & pray' model of coaching is ineffective.

The strategic guardrails informed the 'How' of our task. But in order to work on a pull-based model, we needed to learn about the 'What' directly from the teams.

"THE WHAT"

Coaching as an enablement service can significantly impact the team when it is actively seeking help. However, for people to engage willingly, the coach must demonstrate credibility and care in handling their challenging situations.

The internal coaches had been directed to focus on *training versus coaching,* moving from one batch of launches to another. But those teams often did not receive support implementing practices and quickly reverted to old ways of working. This led to frustrations and subversion. In addition, the external consultants emphasized measuring the launched teams' Agile "Maturity." So, when the agile trainers engaged with the teams in between launch missions, they were perceived as the "Agile police."

This episode demonstrates that coaching cannot be imposed on others. We had to change this perception from "Agile police" to credible enablers.

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OUTCOMES

LEAD WITH EMPATHY:

Agile transformations are often practice-focused, with the organization training people to execute agile behaviors and expecting instantaneous results to follow. Naturally, this scenario never works because it doesn't accommodate the day-to-day experience (the context) of the people doing their jobs.

To regain trust, the Evolve Agility coaches introduced design- thinking interviewing techniques. The internal coaches then paired up and reached out to the teams that had been previously launched to interview them.

The objective was to understand what it was like to practice agile in the IT department. We wanted to learn about the outcomes people desired and whether they focused on the agile practices they expected to follow. We coached the interviewers to avoid giving solutions. As a result, the interviewees opened up, sharing their frustrations and recognizing that the former "agile police" were now sincerely attempting to empathize and understand. Unlike typical traditional consultancies who assess and report, we wanted to develop an internal capability to reflect and learn.

"What was unique was that Dhaval's coaching approach was that he was trying to understand where we were, and provoke us to think of the solutions on our own, rather than telling us what to do," said our client.

After a series of interviews guided by Evolve Agility, the company's coaches collected and ranked desired outcomes using a Jobs-to-be-done (JTBD) framework. This helped us to separate *underserved needs* from appropriately or overly-served needs.

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ENGAGEMENT

Topic Area	Outcome Statement	Importance	Satisfaction	Opprotunity Score
Transperancy, Sr. management, Jira	Increase clarity on how initiatives filter down to user stories Or Increase in clarity in how work is prioritized	10	-1	21
Transperancy, Sr. management, Jira	minimize competition for resources	10	-1	21
Transperancy, Sr. management, Jira	increase visibility of current prioritized project updated daily	9	-1	19
Transperancy, Business, Dependencies	increase business understanding of impact of last minute sprint adds/swaps	10	2	18
Transperancy, Prioritization, Cross-team	increase clarity on impediment ranking and removals	10	1	19
Transperancy, Prioritization, Cross-team	increase consistency of CoPs for Pos, SMs, & teams on frequency (monthly), solutions, and actions	10	2	18

We concluded with a facilitated workshop.

"The experience with Evolve Agility was eye-opening.
We were looking at things from a lens we had never seen before,"
one of our trainees said.

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RESET

As a result, we developed a shared understanding of all the information gathered and agreed on goals, including:

- ◆ Improve business and IT collaboration
- ◆ Enable management to learn, support, and lead Agile transformation
- ◆ Improve team adoption and ownership of agile practices, so the teams can control their own destiny

The internal coaches team was rebranded as the Agile Enablement Team, adopting a Scrum framework with a transparent coaching 'product' backlog. The items in the backlog aligned with the themes identified above.

A REFRESH

REFORMED TRAINING CURRICULUM

Although more teams had been launched over the last twelve months, many had reverted to siloed, project-based practices. Many of the lessons from agile training had evaporated, or at best were practiced poorly. Without ongoing coaching support, it's difficult for teams to retain and apply new ways of working. We needed to realign in our training and get back to the spirit of Agile.

"We wanted to *be agile* rather than just *do agile*. We focused on developing agile coaches and scrum masters. We wanted to have our own coaching internally. That required "a paradigm shift," according to this company director.

MINDSET

To answer that need, Evolve Agility led Scrum Alliance,® accredited standardized role-based trainings:

◆ Certified Scrum Master®

◆ Certified Product Owner®

◆ Advanced Certified Scrum Master®

These sessions helped to clarify role confusions the teams had experienced. And by reestablishing role expectations, we empowered them to identify gaps in their local agile implementations.

Through our outcome-based interview process, we identified specific areas that needed more practice-based training. In the prior transformation period, the training sessions were delivered by reading PowerPoint slides, which failed to connect with the attendees. They hadn't learned how to integrate an agile mindset in their daily work.

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TRAIN-THE-TRAINER

Instead, Evolve Agility coaches trained and prepared the Agile enablement team to learn accelerated adult learning techniques. These techniques minimized the use of PowerPoint-driven lectures, replacing them with activities and exercises to improve learning and retention. By redesigning the training curriculum, we could also eliminate confusion, establishing a common understanding of agile values and principles among internal trainers.

This led us to develop an outcome-oriented training curriculum, published internally to allow anyone in the company to sign-up for bite-sized training sessions (1-2 hours). During these events, they learned specific techniques that they could immediately apply in their team settings. We also extended coaching support to help them implement these new techniques.

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BRIDGE

We developed a rolling calendar of training events, focusing on a variety of practical techniques, and enabled a pull-based learning system for the organization. Because we had designed the training modules to solve specific problems that it commonly encountered, IT participation increased, generating renewed interest from business teams. These led naturally to coaching support offered to both business and IT teams together.

"We were getting interest from the business side," one director said. "They were asking, 'How can you help us?' That was a welcome surprise. It was a backdoor way to lure them in."

A key takeaway was to avoid selling agile practices as solutions and instead champion learning around shared pain points. Combining training bites with follow-on coaching support helped rebuild bridges and changed the perception of trainers on the ground.

STRUCTURED COACHING APPROACH

The internal agile enablement team managed a coaching backlog to service the needs expressed by practitioners. To develop a common approach, the Evolve Agility coaches trained and coached internal coaches on applying the coaching canvas.

Evolve Agility's Team Coaching Canvas:

◆ Provides a frame of reference for coaching individuals and teams. Its common framework captures the challenge faced by the team, the situation experienced by different actors, and a results log of observations made after the coaching intervention.

◆ Helps the coachee (person or team) to reflect on the dynamics that unfold over time as the coach supports the team through a challenging situation.

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COACHING

◆ Helps the coach share a team situation with other coaches, allowing collaboration drawing on each other's strengths to design interventions.

Coaching is a relationship, and it's common for coaches to build strong connections with some people and teams. This can lead to territorial behaviors where other coaches from the coaching team will avoid stepping on each other. This eventually may increase drift, causing the organization to lose coherence. Agile practices between teams start to differ and impact the ways they align with larger initiatives.

In our experience, an internal coaching team's territorial behavior often stems from an unmet need for common agreement on the coaching approach.

Evolve Agility's coaching canvas bridges this gap.

The canvas offers a disciplined, structured approach from which coaches may build agreement on interventions to be tried. Using this common structure for discussing and reviewing coaching interventions, the Agile Enablement team accelerated their personal growth as coaches while supporting agile transformation needs.

COACH-THE-COACH

"The coaching team's confidence improved by working on a variety of challenges, and situations. We did not offer canned solutions, but worked together," said the company's Owner for Agile Enablement.

For solution seekers who just wanted answers without personal accountability or commitment, this approach proved frustrating at times. However, a coaching approach works best when the coachee is willing to take responsibility and exercise their personal agency to improve their situation.

Knowing when not to coach is as important as it is to learn how to coach.

COACHING IMMERSION PROGRAM

The large number of agile teams meant that the Agile Enablement team's limited capacity would be insufficient to provide the support needed on the ground. Through role-based training sessions, and ongoing coaching support, we had recognized motivated Scrum Masters who were eager to learn and develop their skills. They wanted to advance coaching skills to support their team's growth towards high-performance.

Evolve Agility had introduced the coach-the-coach program to develop competencies beyond the Agile Enablement team. This program included a defined learning curriculum, anchored in practice through the Coaching Canvas. We had also introduced various system thinking techniques to help design the coaching interventions. As a result, we were now able to invite Scrum Masters to participate in the coaching immersion program.

The coaching immersion program encouraged Scrum Masters to spend 1-2 days/week to participating in a self-paced learning curriculum and on-the-field coaching canvas cycles.

UPSKILL

This helped the Scrum Masters gain a broader understanding of the challenges at the enterprise level, while increasing exposure to various coaching techniques. The Scrum Masters participated in the immersion program for 2-3 months as they developed coaching competency that they took back to serve their teams.

Through the immersion program, we were able to offer coaching services to many more teams. And the team coaching canvas structure allowed experienced coaches to mentor new coaches in their personal development.

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EVOLVE

SUMMARY

A leading wholesaler asked Evolve Agility to step in and stabilize the agile transformation efforts initiated by a large consulting company that had promised more than they could deliver.

By the time we had completed our engagement, we had developed internal agile coaching competence and made significant inroads by strengthening the business and IT relationships. This case-study captures only one aspect of our contribution to this business' agile journey. We were also involved as advisors for organizational policies on hiring agile talent, organization design strategy, and financial governance policies (cap-ex, op-ex).

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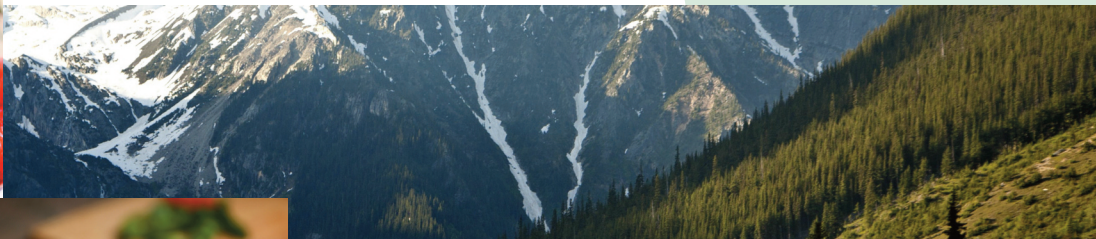
AGILITY

Our approach valued the people and their experiences. We invited employees to participate in the transformation journey and empowered them to own their growth. The leadership support and frank conversations that we had along the way guided our mutual choices to make the most of the available resources and the organization's appetite for change.

Right after our engagement ended, the Coronavirus pandemic hit globally. In response, our client was able to form new cross-functional teams that included both business and IT people. They delivered value quickly through experimentation, learning, and adapting. The Agile enablement coaches transitioned into practitioner roles as Scrum Masters and contributors to lead key teams through a global crisis and the organizational changes that it had triggered.

"To summarize, I would say we finally realized what coaching looks like and feels like versus just being a trainer or being trained," one of our clients said. "Evolve helped teams identify and solve their own problems versus doing it for them."

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