What would it mean to Coach an Agile Enterprise?
from

Coaching the Agile Enterprise:
A Handbook for Emerging Transformation Leaders, Change Artists and Benevolent Trouble-Makers

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Coaching an Enterprise

1. Know Your Client
2. Know Your Tools
3. Know Your Self

The basis of effective and ethical coaching.
BARRIERS TO FURTHER AGILE ADOPTION

As expected, the same reason agile projects fail is also what keeps companies from further agile adoption – culture. Respondents cited an “inability to change organizational culture” and the “general resistance to change” as the 2 most commonly cited barriers, followed by trying to fit agile elements into a non-agile framework.

*Respondents were allowed to select more than 1

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Methods & Practices

Further on

Projects fail is an ability to general commonly cited

35% Trying to fit agile elements into a non-agile framework

53% Inability to change organizational culture

42% General resistance to change

33% Availability of resources

30% Management support

25% Customer collaboration

23% Perceived time to transition

13% Budget constraints

13% Source: Version One 2013 “State of Agile” Survey
Enterprise Background Noise

What’s the org structure?

Sample Matrix Organizational Structure

What’s the culture?

Who likes whom?

How do leaders lead?

How do I get ahead?

How do you get things done here?
Co-Creating an Organizational Change Strategy

Understanding Organizational Culture

Understanding and Working with Executive Teams

Understanding the Human Change Process

Enabling Technical Craftsmanship in the Team Culture

Integrating Leadership, Culture and Teams

Understanding Organization Systems Entry

Components and Considerations of Organizational Assessments

Identifying and Addressing Organizational Impediments

Educating at an Organizational Level

Communicating at an Organizational Level

Awareness of Large Group Facilitation Methods

Source: IC Agile
Ready for an Upgrade?
Integral Operating System (IOS)

**INTEGRAL**: “possessing everything essential or significant; complete; whole.”

An integral approach incorporates all of the essential perspectives, schools of thought, and methods into a unified, comprehensive and accurate framework.
Before proceeding, you might want to consider...

You take the **Blue Pill**,  
The story Ends. You wake up in your bed and believe whatever you want to believe.  
You take the **Red Pill**,  
You stay in Wonderland and I show you how deep the rabbit hole goes

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Know Your Client

What types of clients are in what contexts going through what kind of change?
Types of clients

- **Organization**
  - Leadership & Self-mastery
  - Agile methodologies
  - Creative-oriented leadership
  - Not reactive

- **Program/Dept**
  - Software Craftsman (product development)
  - Lean Startup (Customer Development engineering)
  - Agile methodologies
  - Shared purposes, concepts, culture
  - Not reactive

- **Team**
  - Lean Startup (product development)
  - Lean processes, concepts, culture
  - Agile methodologies
  - Structures, Policies

- **Individual**
  - Not reactive

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The Challenge of Vertical Learning

- The psychology of the adult human being is an unfolding, ever-emergent process marked by subordination of older behavior systems to newer, higher order systems.
- The mature person tends to change his psychology continuously as the conditions of his existence change.
- When a person is centralized in one of the states of equilibrium, he has a psychology which is particular to that state. His emotions, ethics and values, biochemistry, state of neurological activation, learning-systems, preference for education, management and psychotherapy are all appropriate to that state...
- Thus, he would respond most positively to education, management and therapy which is congruent with that state. And he would have to respond negatively to forms of education, management and therapy not appropriate to the state of his centralization, (2005, p. 29-30, emphasis added).

-Clare W. Graves, Union College
# Clare Graves’ Research

## What is a Mature Personality?

<table>
<thead>
<tr>
<th>Conception</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Red** | Express self, to hell with others less one feel shame  
aggressive, heroic, exploitative, no worry or guilt |
| **Amber** | Sacrifice now to get reward later  
denies self, higher absolute authority, rewards later, dogmatic |
| **Orange** | Express self calculatedly with little shame or guilt  
get what self desires without undue reaction from others |
| **Green** | Sacrifice self now to get reward now  
denies self, values others to get approval & satisfaction now |
| **Teal** | Express self but not at the expense of others  
non-dogmatic, express self but never at the expense of others |
The Context of enterprise clients

The Evolution of People & Culture (*altitudes*)

<table>
<thead>
<tr>
<th>Self (I) (thinking)</th>
<th>Color</th>
<th>Culture Type (WE)</th>
<th>Online</th>
<th>Orientation - Behaviors</th>
<th>Motivation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Instinctive</strong> (autistic)</td>
<td>Beige</td>
<td>Archaic</td>
<td>100,000 yrs</td>
<td>Wild - food, water, shelter, safety, sleep, mating <em>Lives for survival</em></td>
<td>Survival</td>
</tr>
<tr>
<td><strong>Magical</strong> (animistic)</td>
<td>Purple</td>
<td>Animistic / Magical</td>
<td>40,000 yrs</td>
<td>Tribal - family, tribe, rituals; respect elders, ancestors, spirits <em>Lives for past</em></td>
<td>Tradition, avoiding angering gods</td>
</tr>
<tr>
<td><strong>Egocentric / Impulsive</strong> (egocentric)</td>
<td>Red</td>
<td>Magical-Mythic</td>
<td>10,000 yrs</td>
<td>Exploitative - power-driven, privilege, gang mentality <em>Lives for now</em></td>
<td>Power, fear of shame</td>
</tr>
<tr>
<td><strong>Mythic / Conformist</strong> (absolutistic)</td>
<td>Amber (Blue)</td>
<td>Literal-Mythic</td>
<td>4,000 yrs</td>
<td>Truth – purpose-driven, authoritarian, obedient, disciplined, dogmatic <em>Lives for future</em></td>
<td>Order &amp; meaning; avoiding guilt</td>
</tr>
<tr>
<td><strong>Achiever</strong> (materialistic, empirical)</td>
<td>Orange</td>
<td>Scientific-Rational</td>
<td>300 yrs</td>
<td>Entrepreneurial - strategic, competitive, success-driven, acquisitive, freedom-loving <em>Lives for gain</em></td>
<td>Adequacy, competency</td>
</tr>
<tr>
<td><strong>Sensitive / Affiliative</strong> (humanistic)</td>
<td>Green</td>
<td>Pluralistic / Relativistic</td>
<td>120 yrs</td>
<td>Community - harmony, growth, equality, relativism <em>Lives for a cause</em></td>
<td>Affiliation, belonging</td>
</tr>
<tr>
<td><strong>Autonomous / Authentic</strong> (systemic)</td>
<td>Teal (Yellow)</td>
<td>Holistic / Systemic</td>
<td>Now 70 yrs</td>
<td>Systemic - spontaneity, adaptive, competence, integrates systems, <em>Lives for synergy</em></td>
<td>Autonomy, mastery</td>
</tr>
</tbody>
</table>

Source: adapted from Chris Lucas [http://www.calresco.org/wp/spiral.htm](http://www.calresco.org/wp/spiral.htm), Wilber, Cook-Greuter, Graves (p. 180-182, 409), and Beck
What would an **Agile Organization** be like?

<table>
<thead>
<tr>
<th>Function</th>
<th>Traditional (Orange) Organizations</th>
<th>Emerging (Teal) Organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ORGANIZATION</strong></td>
<td>Hierarchical pyramid</td>
<td>Self-organizing teams; coaches with no mgmt authority</td>
</tr>
<tr>
<td><strong>PROJECTS</strong></td>
<td>Heavy project management methods</td>
<td>No project mgrs; people self-staff projects</td>
</tr>
<tr>
<td><strong>RECRUITMENT</strong></td>
<td>Interviews by HR to match with job description</td>
<td>Interviews by future team members</td>
</tr>
<tr>
<td><strong>JOBS</strong></td>
<td>Each has own description &amp; job title</td>
<td>No job titles; fluid, granular roles</td>
</tr>
<tr>
<td><strong>PERFORMANCE MANAGEMENT</strong></td>
<td>Focus on individual performance; appraisal by supervisor</td>
<td>Focus on team performance; peer appraisals</td>
</tr>
<tr>
<td><strong>PROMOTIONS</strong></td>
<td>Jockeying for position, politics</td>
<td>No promotion, roles fluidly rearranged with peer agreement</td>
</tr>
</tbody>
</table>

Adapted from *Reinventing Organizations*, by Frederic Laloux
How are altitudes distributed (roughly speaking)?

Distribution of Altitudes

- Red, 5%
- Amber, 30%
- Orange, 40%
- Green, 20%
- Teal, 7%
### Clare Graves (Spiral Dynamics)

#### Structure & Management Style by Level

<table>
<thead>
<tr>
<th>Level</th>
<th>Organization Structure</th>
<th>Management Style</th>
<th>How People Want to be Managed</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Red</strong></td>
<td>Strong man rule, empire</td>
<td>Exploitative</td>
<td>Paternalistic</td>
</tr>
<tr>
<td><strong>Amber</strong></td>
<td>Pyramid, hierarchy, authority structure</td>
<td>Paternalistic</td>
<td>Consultative</td>
</tr>
<tr>
<td><strong>Orange</strong></td>
<td>Functional units, strategic enterprise</td>
<td>Consultative</td>
<td>Participative</td>
</tr>
<tr>
<td><strong>Green</strong></td>
<td>Social network, Circle</td>
<td>Participative</td>
<td>Facilitative</td>
</tr>
<tr>
<td><strong>Teal</strong></td>
<td>Evolving around needs</td>
<td>Facilitative</td>
<td>Systemic</td>
</tr>
</tbody>
</table>

-from "How Should Who Lead Whom to do What?" by Dr. Clare Graves, YMCA Management Forum 1971-1972-

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Variations of Agile by Altitude

Tradition-driven Agile

Results-driven Agile

People-driven Agile

Adaptive Agile (Impact-driven)

What Agile looks like in different organizational contexts.

Concept Inspired by Dajo Breddels, Agile 2012

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Tradition-driven Agile

- Loves detailed processes
- Inherently violates spirit of Manifesto (or they’re not Amber)
- Mgmt will struggle with self-organization
- Possible benefits: iterative, customer focus, quality, speed, small, local process improvements
- Kanban maybe a better fit culturally

People-driven Agile

Results-driven Agile

Manifesto Alignment

- Comprehensive documentation over working software
- Following a plan over responding to change
- Processes & tools over individuals & interactions

Portions adapted from: Dajo Breddels, Agile 2012

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Results-driven Agile

Driven by:
- Results
- Saving money
- “Doing more with less”
- Nominal customer satisfaction

Expect: competition for recognition more than teamwork

Management may use Metrics to compare teams

Excellence thru technical practices

Manifesto Alignment
Contract negotiation over customer collaboration
Working software over comprehensive documentation

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Portions adapted from: Dajo Breddels, Agile 2012
People-driven Agile

Tradition-driven Agile

Results-driven Agile

People-driven Agile

Adaptive Agile (Impact-driven)

- Focus: people, underlying values
- Real empowerment for teams
- Likes: Owning their estimates & making technical decisions
- Likes: Flat organization
- Morale goes up
- Consensus resonates; downside = “death-by-consensus”
- True Customer partnerships possible

Manifesto Alignment

Individuals & Interactions over processes and tools

Customer Collaboration over contract negotiation

Portions adapted from: Dajo Breddels, Agile 2012
Adaptive Agile

Tradition-driven Agile

Results-driven Agile

People-driven Agile

Adaptive Agile (Impact-driven)

- Whole system view & systems thinking, embraces complexity
- Processes & systems support “Flow”
- Rotating leadership & dropping of roles is natural
- Values effectiveness over efficiency for all stakeholders
- “Full-blown” Agile is possible

Manifesto Alignment

Responding to change over following a plan

Portions adapted from: Dajo Breddels, Agile 2012

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Change State

Are They Ready for Change?

Source: [http://www.spiral-dynamics.com/resources_assessments.htm](http://www.spiral-dynamics.com/resources_assessments.htm)
See also: Spiral Dynamics, Don Beck & Chris Cowan
Know Your Tools

What tools are appropriate to which clients?
Types of Tools

Increasing EQ, leadership development, personality profiles, introspection, reflection, meditation, solitude, self-awareness

The “I” Perspective

Corporate vision, mental models, dialogue process, transformational change, culture design

The “WE” Perspective

Scientific method, metrics, analysis, observation, financial controls, statistics, productivity measurement, financial targets, (single) product

The “IT” Perspective

Systems thinking, portfolio analysis, strategic planning, trend forecasting, empirical management systems, lifecycle analysis

The “ITS” Perspective

adapted from Brett Thomas, AQAL Elements Applied to Leadership
Tools by Quadrant

**Software Craftsmanship (values)**
- Leadership Agility (Joiner)
- The Leadership Circle (Anderson)
- Professional Coaching (Co-active)
- Focus on agile values
  - ‘Being’ Agile!

**Software Craftsmanship (practices)**
- Applying the scientific method
- Kanban (within a team)
- Agile behaviors & practices

**“I”**

**“IT”**

**“WE”**

**“ITS”**

**Schneider culture model**
- Collaborative culture
- Systems Coaching / RSI™
- Examining mental models (Senge)
- Having an Agile culture

**Scaled Agile Framework™**
- Beyond Budgeting
- Kanban Portfolio System
  - “Systems Thinking”
- Theory of Constraints
- Holacracy

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Integral Agile

**Meta-Map of Agile Enterprises**

- Leadership & Engagement
- Organizational Culture & Shared Vision
- Competencies, Products & Technologies
- Organizational Architecture & Environment

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An Application for Management

**Leadership & Engagement**
- **Role:** Coach-Leader
- **Responsibility:** Developing people’s leadership potential, including your own
- **Practices:** Get in touch w/your vision; develop yourself as a leader; coach individuals

**Psychological Window**

**Competencies & Products**
- **Role:** Business-Leader
- **Responsibility:** Value creation processes; growth of relevant individual competencies
- **Practices:** Introduce new competencies and value-creation processes

**Behavioral Window**

**Organizational Culture & Shared Vision**
- **Role:** Facilitative-Leader
- **Responsibility:** Create a culture of deeply shared meaning and ‘barely sufficient’ management
- **Practices:** Orient shared vision; socialize agile thinking; engage informal champions

**Cultural Window**

**Organizational Architecture & Environment**
- **Role:** Systems-Leader
- **Responsibility:** Increase flow, minimize waste; see the whole system
- **Practices:** assess and remove deep organizational barriers to flow (including those which agile teams encounter)

**Systems Window**

**Agile Teams**
- **Role:** Guardian-Leader
- **Responsibility:** Creating environment for teams
- **Practices:** Make sure teams have what they need
## Integral Tool Matrix

### What tools fit your client?

<table>
<thead>
<tr>
<th>Leadership (I)</th>
<th>Org Culture (WE)</th>
<th>Practices / Competencies (IT)</th>
<th>Org Architecture (ITS)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Expect mainly Reactiv / Expert leadership</td>
<td>• Formal, role-based</td>
<td>• Iterative development</td>
<td>• Matrix structure with empowered customer</td>
</tr>
<tr>
<td>• Expect Reactive (Expert, Achiever) leadership</td>
<td>• Agile by edict</td>
<td>• “Simplistic” Kanban</td>
<td>• Expect MBO structure &amp; “rank &amp; yank”</td>
</tr>
<tr>
<td>• Tactical Intro of Coaching competency for goal clarification</td>
<td>• Expect “Competitive,” Profit-driven (obsessed)</td>
<td>• Engineering Practices – measure biz goals</td>
<td>• Look for “pain”</td>
</tr>
<tr>
<td>• Team owns work (as long as biz goal met)</td>
<td>• Values-driven</td>
<td>• (partial) Lean Startup</td>
<td>• Flat org structure</td>
</tr>
<tr>
<td>• Team owns work (as long as biz goal met)</td>
<td>• Teams own results</td>
<td>• Kanban – cycle time</td>
<td>• Performance Revs done by Teams</td>
</tr>
<tr>
<td>• Participative, consensus</td>
<td>• Self-organized teams!</td>
<td>• Results-driven Scrum</td>
<td>• Policies on rights of workers</td>
</tr>
<tr>
<td>• Family “feel”</td>
<td>• Purpose-driven culture</td>
<td></td>
<td>• True meritocracy &amp; Theory of Constraints</td>
</tr>
<tr>
<td></td>
<td>• Creative (Catalyst &amp; above)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Coaching (multidimensional)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Lean Startup / Customer Development</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Software Craftsman</td>
<td></td>
</tr>
</tbody>
</table>
Know Your Self

Understand your preferences, motivation, training and EQ.
What’s Your Preference?

Collective vs. Individual

Subjective vs. Objective

“I”

“IT”

“WE”

“ITS”
What is your Motivation?
What’s your EQ?

Two Life Stances

Reactive
- Complying
- Controlling
- Protecting

Creative
- Authenticity
- Self-Awareness
- Relating
- Achieving

TheLeadershipCircle.com
Upgrade to the IOS

Secret Activation Code:

I  We  It  Its

Community Practice:
Cross-Window Conversations
Coaching the Agile Enterprise – book excerpt – 

*Downloading the IOS*