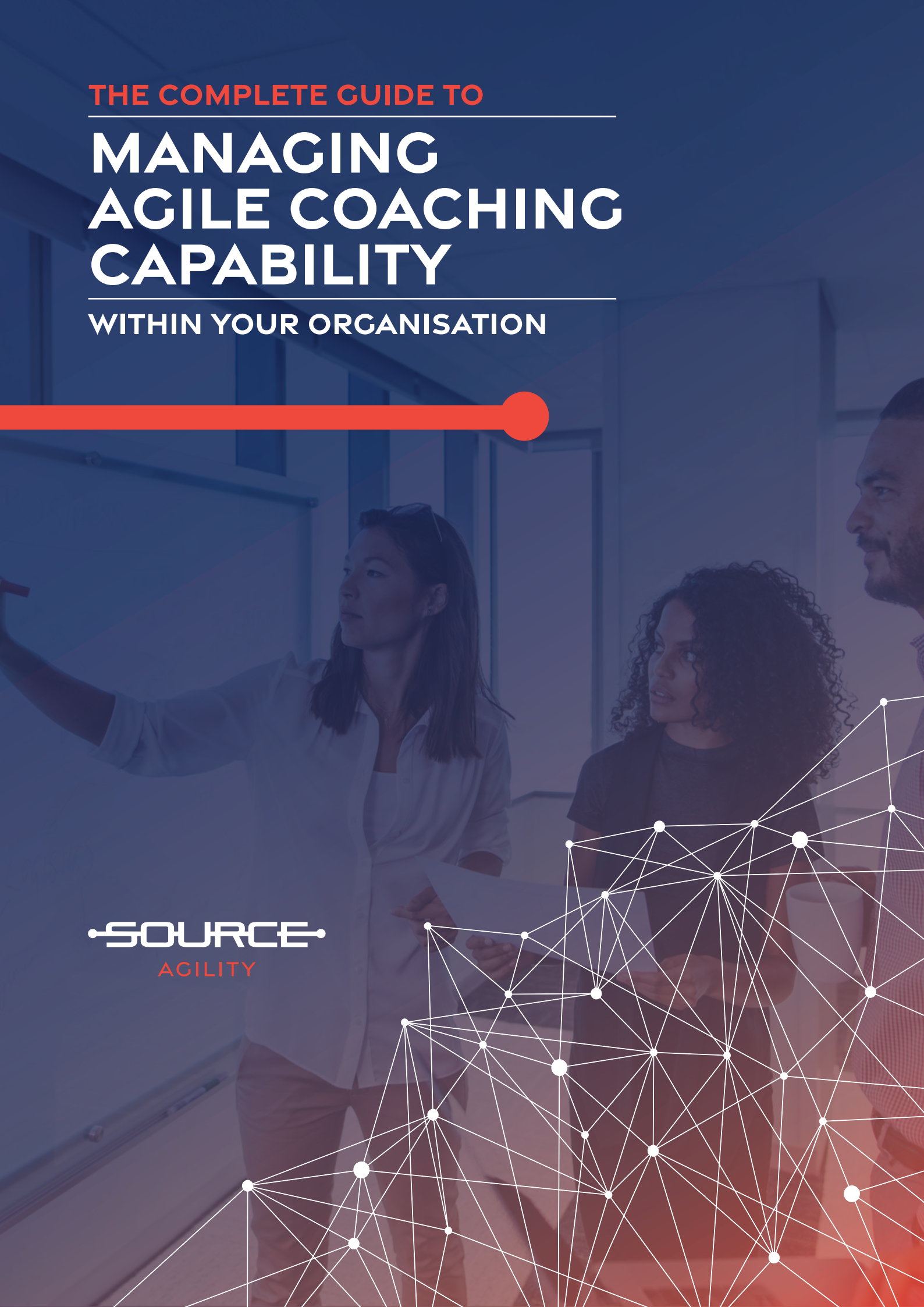


THE COMPLETE GUIDE TO

MANAGING AGILE COACHING CAPABILITY

WITHIN YOUR ORGANISATION

SOURCE
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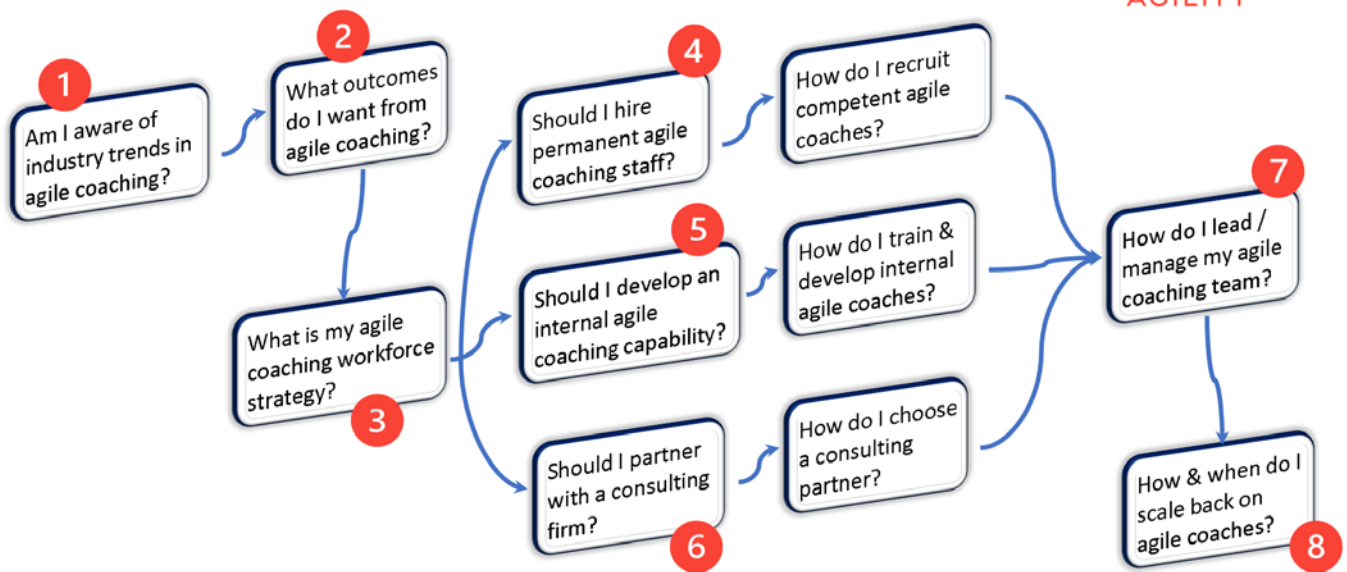


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INTRODUCTION AND HOW THIS PAPER IS STRUCTURED

This paper is designed as a guidebook on how to build an agile coaching capability that meets the needs of your change program. The content is provided in a sequence that follows the lifecycle of planning, building and sustaining an agile coaching capability. The graphic below shows how the information in this paper is arranged and poses a series of questions to help the reader work through the processes, building agile coaching capability from end to end.



The paper will walk you through each step in the above process taking the time to explain what is required and should be considered at each step. At the conclusion of each section, I will provide you with “Tips for the reader”; these are our recommended considerations at each step of the process.

1. AGILE COACHING; CURRENT INDUSTRY TRENDS

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I. AGILE COACHING; CURRENT INDUSTRY TRENDS

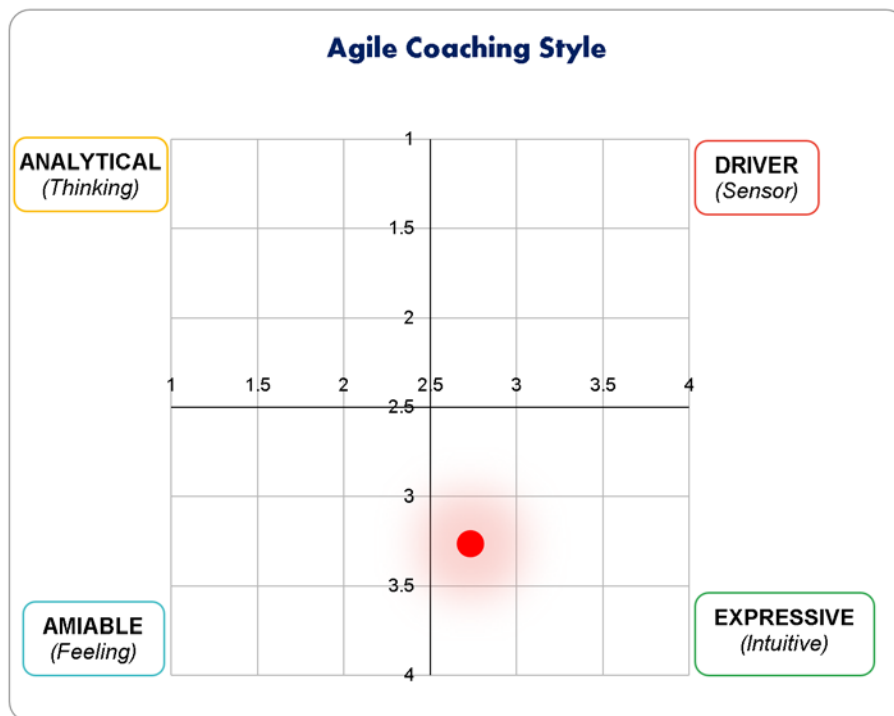
In this section I outline two important trends currently active in the agile coaching community. As you consider these topics it will help inform your thinking on the type of agile coaches you need for your current change program as well as flag one of the biggest risks when hiring coaches.

Coaching versus consulting; asking versus telling

Professional coaches (life or leadership type of coaches) tend to ask lots of what are called “powerful” questions. The idea being that the coach enables the coachees to discover the answers to their problems through a guided conversation. Professional coaching has recently become the must-have competency for agile coaches. The challenge is that professional coaching does not neatly fit into the everyday agile coach role. Agile coaches are expected to provide answers and show/tell teams how to do agile whilst taking clients on a journey of change. What this means is that agile coaches need to act as consultants, providing advice, instructing, telling people what the next best step is for them to adopt new ways to work. Giving advice goes against the very definition of what professional coaching is; this results in some agile coaches (who may be new to professional coaching and are keen to practice it) being reluctant to provide advice. Clients of agile coaches can get frustrated when the agile coach responds to every question with a question (as opposed to providing answers).

Coaches have different styles

When Source engages with an agile coach, we take the time to gain an appreciation of their coaching style. Utilising our style assessment survey (based on the Social Style® model) we provide the coach with feedback on how they approach conversations with clients. The assessment provides a coach with an indication of their natural tendencies to “tell” or “ask”; to provide advice or to prompt with open questions. Below is an example of how the test provides the coach with a view of their style.



At Source we recommend that hiring managers carefully consider the style of coaching they require to suit the organisation's culture and current change aspirations.

Tips for the reader:

- When considering which agile coaches to bring in to support your change program ensure they have fully integrated the "coach" part of the agile coach role into the way they deliver their agile coaching service.
- Look for coaches that have a mix of experience in consulting (providing advice), delivery (getting work done) as well as professional coaching (helping people solve their own problems through guided conversation).
- As you assemble your agile coaching team aim to strike a balance of styles.

The imposter agile coach

Given the high expectations on the agile coaching role, a disturbing trend has emerged, the imposter agile coach. It is well-known in the agile community and has been the subject of many heated debates that some agile practitioners self-appoint the title of agile coach. Often this happens following the practitioner completing a two-day knowledge-based 'certified' training course. Changing your LinkedIn profile and labelling yourself an agile coach is seen as the quickest way to make the transition into the higher paying more prestigious role of an agile coach.

This pattern of behaviour leads to incompetent agile coaches and in turn failed agile programs which negatively impacts agile's brand. The root cause of this results from imposter agile coaches being hired by inexperienced (in agile) managers. The hiring managers often do not know what they don't know (about agile and agile coaches). Placing the imposter (agile coach) in a position to lead your change program increases the risk of failure.

Tips for the reader:

Always have someone who is a proven industry recognised expert agile practitioner to support you during the recruitment process; even if they sit in on one interview. This will greatly reduce the risk of the hiring manager being 'fooled' by an imposter agile coach. An agile expert will use their personal/professional network to screen candidates, they will also be able to utilise role play/scenario-based interview techniques to see the candidate in action before offering them a role.

2. THE OUTCOMES TO EXPECT FROM AGILE COACHES

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2. THE OUTCOMES TO EXPECT FROM AGILE COACHES

Knowing what you want agile coaches to deliver (outcomes) is a great place to start as you commence the recruitment process. It is easy to get confused on exactly what an agile coach is accountable for, recent industry debates have framed this discussion as agile versus agility. Read on to learn more.

Agile versus Agility

Traditionally, agile coaches have been associated with improving the system of delivery; enabling work to get to “done”. This agile coaching work was usually done in the area of software delivery. Agile coaches have mostly been seen as enablers of change; helping teams adopt new/better ways to work. More recently with the growing emphasis on business agility, agile coaches have had additional expectations placed upon them. These include an increased understanding and appreciation of business outcomes and the ability to directly impact (through their coaching) business performance metrics. This type of coach has been referred to as a business agility coach.

At Source we believe that the above two perspectives (agile and agility) are additive, not mutually exclusive; meaning an expert agile coach is expected to not only enable the adoption of agile ways of working through shifting mindset and experimenting with new practices, but also keep one eye on the business outcomes of the teams they coach and, wherever possible, guide the team to improve the frequency and amount of value delivered.

Tips for the reader:

- Be clear on what you are expecting from your agile coaches. Business agility coaches that not only help with adoption of new ways to work but can also help shift business performance metrics are difficult to source, are relatively rare (compared to an agile adoption coach) and usually cost 10-20% more on a daily rate basis.
- Include some business representatives in your agile coach recruitment interviews; get their perspective and opinion on candidates.

3. PREPARING YOUR AGILE COACHING WORKFORCE STRATEGY; BUILD, BUY OR BORROW

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3. PREPARING YOUR AGILE COACHING WORKFORCE STRATEGY; BUILD, BUY OR BORROW

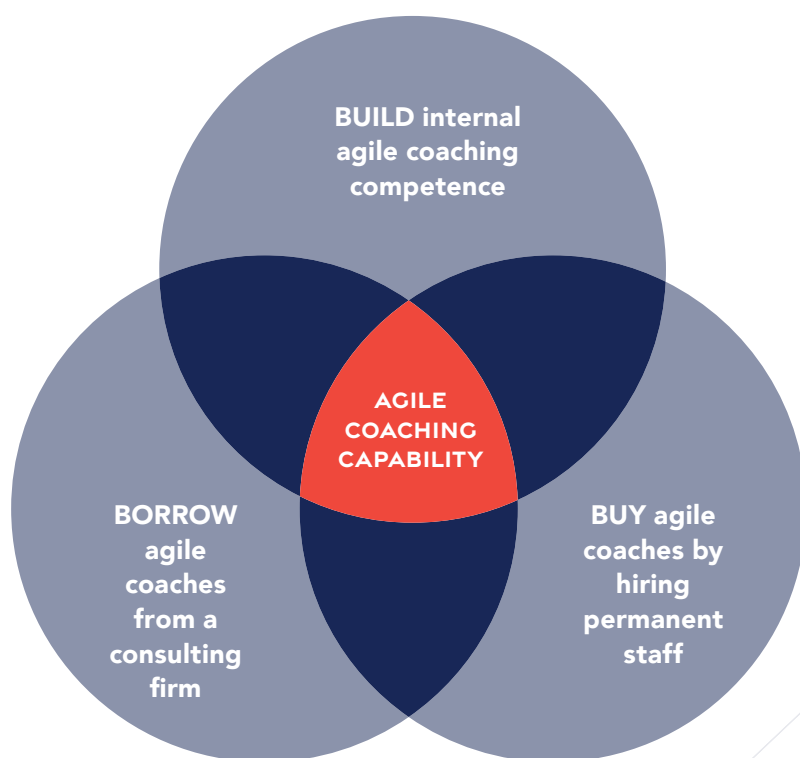
Let's start with a definition.

*"A **workforce strategy** helps you achieve your business objectives by sizing up your existing talent and predicting your staffing needs, for the immediate future and for the long term.*

As you prepare for an agile change program, the type and number of agile coaches can be estimated in advance and a workforce strategy put in place across the lifecycle of the change to source, induct, manage and (eventually) reduce your agile coach headcount. Part of this plan is to consider how you source your agile coaches; build internal capability, buy them in as permanent staff or borrow them as temporary contractors/consultants.

The three sources of agile coaching capability; build, buy or borrow

A key part of preparing your agile coaching workforce strategy is the number and type of agile coaches you require across the three difference sources; see the diagram below.



Hiring permanent staff (BUY) as the initial core team is often the best way to put strong foundations under an organisation's agile coaching capability but presents the challenge of not having expert advice as you make these important strategic hires. One way to minimise the risk of hiring imposter agile coaches as an organisation starts its start agile coaching journey is to partner with a consultancy who bring in (BORROW) an expert team in the first instance until the organisation can hire their internal team of agile coaches.

Another pattern is to start with consultant or contractor agile coaches (BORROW) whilst establishing an internal learning and development process to produce graduates (BUILD) who can act as internal agile coaches. Often the expert consultant/contractor coaches would mentor these novice internal agile coaches with some staying on long term possibly converting to permanent hires (BUY) as the change program progresses.

The type of agile coaches required

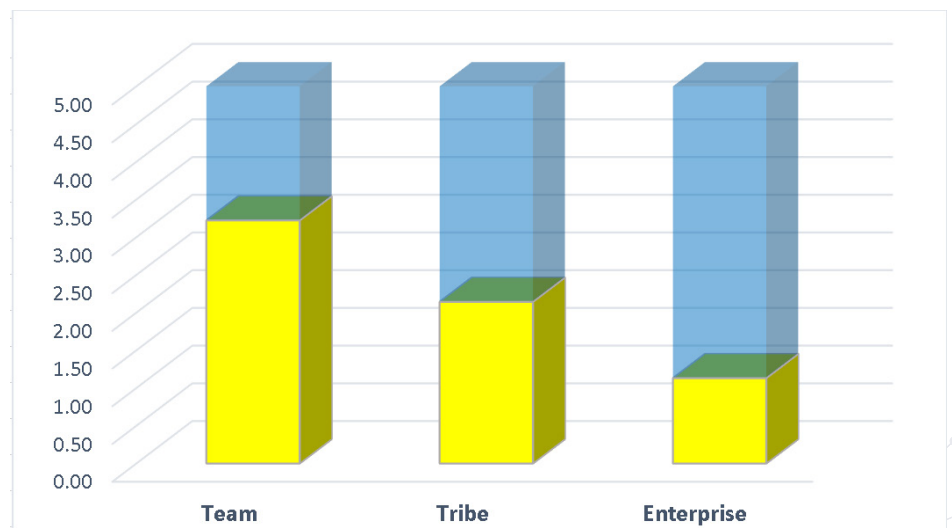
I'd like to spend a little time demystifying and simplifying the types of agile coaching roles that exist. There is no set and agreed way to list all the types of roles in the market, so I'm going to generalise a bit and reduce all agile coaching roles down to three main types aligned to the size of the system of work being coached:

- **Agile Coaching Small – a system of work involving 2 – 30 people**
- **Agile Coaching Medium – a system of work involving 31 – 300 people**
- **Agile Coaching Large – a system of work involving 301 – 1300 people**

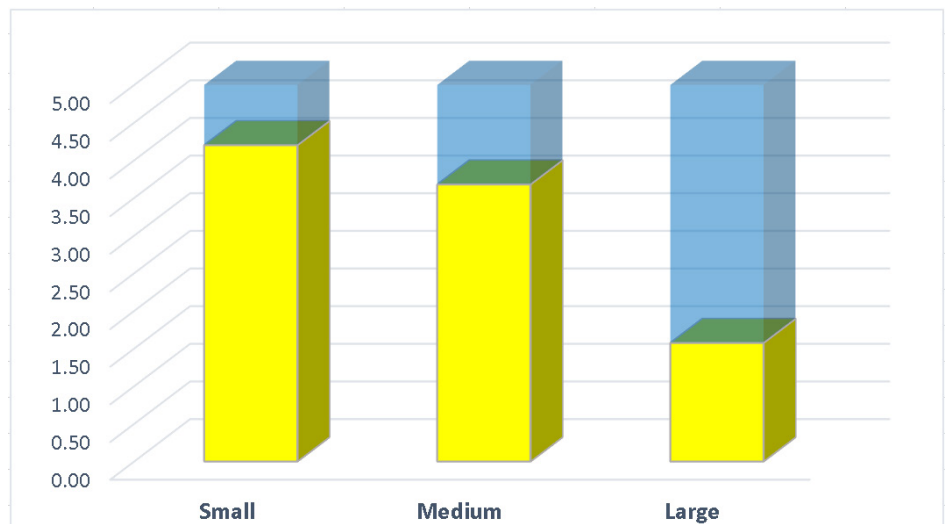
For systems of work any larger than 1300 people, we would argue the coach is probably not doing much coaching and most of their work is consulting or managing (other coaches). Coaches who work on whole-of-organisation agility often are called 'Enterprise Agile Coaches' due to their remit being across multiple systems of work/business units within an organisation. Unfortunately, some agile coaches self-appoint themselves enterprise agile coaches without the very extensive experience required (8-10 years) to execute this role (another type of imposter coach); so be careful if considering hiring an enterprise agile coach.

Each level is important and has its challenges and rewards. Agile coaches usually progress through their career from small through medium and on to large as a sequence, and it could be argued this is the right way to go about it. Working in small systems of work is where coaches learn the basics and how to do them well before thinking about what it means to scale up their coaching practice into the bigger systems of work.

At Source Agility we screen and assess agile coaches for their competency across the three role types using a 50-question interview facilitated by an experienced expert agile coach. The questionnaire enables hiring managers to hire coaches at the right levels and in the right numbers. An example from a recent interview is shown below; this coach has 1-2 years' experience and is just starting out in their career.



If we compare the above profile with an experienced coach working for over 5 years coaching across 100s of people and multiple teams you can immediately see their comparative abilities.



The number of agile coaches required

One of the most common questions I get from sponsors of agile change programs is:

“How many agile coaches do I require in order to adequately support the teams adopting new ways to work?”

Of course, the answer is “It depends”. But here are some questions to help when deciding just how many coaches you need to support the change being planned.

Ratios are helpful when calculating your agile coach requirements. For example, a competent team-level agile coach (small size) can usually support three teams who are relatively new to agile. This number would reduce if:

- **The teams are very immature, dysfunctional or are resistant** to the change. If significant behavioural change work is required then this means closer coaching support, hence the ratio would need to be adjusted; maybe one agile coach for every two teams who are adopting agile.
- **If there is no facilitation support within the team** adopting agile; then more coaching is required. This is usually the result of an organisational design decision to not provide a dedicated team scrum master or similar role for each agile team. Often organisations assume this role can be worn as a “hat” meaning someone in the team who is new to agile can play the role of a facilitator of the agile ceremonies. This is possible but not recommended unless additional agile coach support is factored in. Another level of complication comes with deciding on what the ratio is for team facilitators to number of agile teams; a highly competent agile team facilitator can usually work across two teams. Of course, this ratio also depends on the same factors that affect agile coach to team ratios.

The ratio of agile coaches to teams could also be adjusted upwards; one coach to four teams if the opposite is true and the teams are mature, high-performing, open to change and have a dedicated team facilitator.

Tips for the reader:

- Choose how to utilise the three sources of agile coaching capability (BUILD, BUY, BORROW) and carefully consider how each of these sources will need to be adjusted over time as your change program progresses. Doing this will help set expectations for length of tenure for the coaches and allow for a positive experience for the agile coaches.
- Don't assume a candidate has agile coaching competency just because the resume looks strong; it is important to utilise role play and facilitation exercises when interviewing your agile coaches. Testing for competency is going to be critical if you want to minimise the risk of hiring an imposter coach.
- Understand what level of coach you require and determine if they have the right competency mix with the right pre-requisite skills to work across small, medium or large systems of work.
- If you are hiring or contracting an enterprise-level coach expect to pay a premium; there are only a handful of true experts at this level. Hiring the right enterprise-level coach will greatly accelerate your change adoption whereas an imposter enterprise level coach is probably the biggest threat to a change program's success; they can literally sink your ship.
- When planning your agile coaching workforce, use ratios as a guide not a hard rule; you can adjust as you go along.

4. WHEN AND HOW TO HIRE IN YOUR AGILE COACHING TALENT

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4. WHEN AND HOW TO HIRE IN YOUR AGILE COACHING TALENT

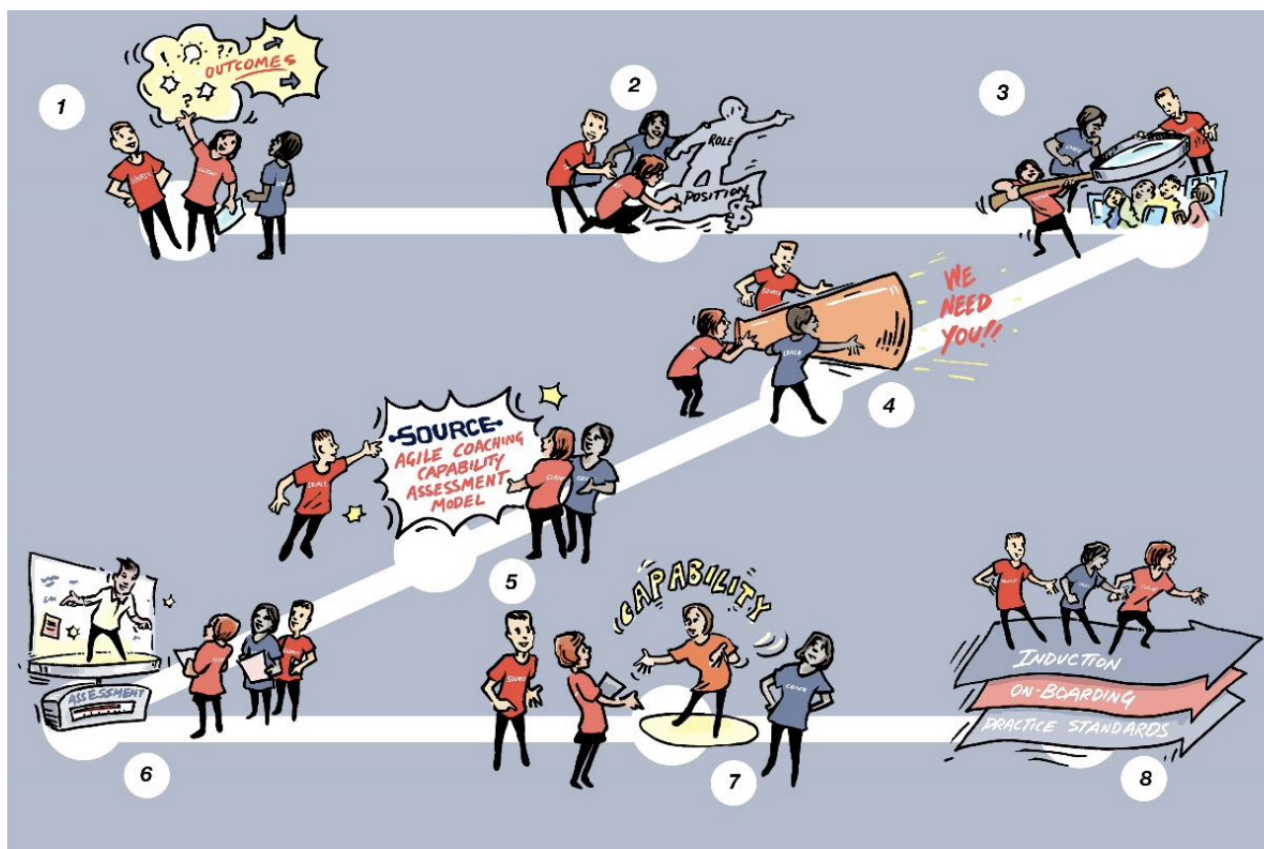


Often change programs represent a move from one state/operating model to another; hence by definition the change will be temporary/transient between the two states. If the change has a start and finish then why would an organisation want to hire permanent staff for their agile coaches? Here are some factors to take into consideration when deciding to hire coaches (over contracting them in):

- **Agile adoption is never done;** it is an ongoing continuous improvement movement that takes years to fully become institutionalised into an organisation's culture. So hiring coaches for the long term to embed the change makes sense.
- **Hiring permanent staff sends a signal** that the organisation is taking the change to agile seriously and is investing for the long term. Hiring permanent agile coaching staff can make for an attractive prospect when sourcing agile coaching talent as some coaches seek secure employment.
- **Internal agile coaches can start to play politics;** one word of caution when considering hiring permanent agile coaches is that they risk becoming part of the culture you are attempting to change. After time an internal agile coach loses their fresh perspective; they become institutionalised in the culture making it more difficult to change the systems, processes and power structures holding the organisation back from achieving higher levels of agility. In short, they become less disruptive and more compliant.

THE 8-STEP AGILE COACH HIRING PROCESS

The illustration below shows how Source sees the overall process of hiring agile coach talent. Each step is explained below the image. We see this as an experience for each candidate that should be actively managed to ensure it is well executed.



1. **Know the outcomes** you're expecting from your agile coaches (see section 2 of this paper); being clear on this allows subsequent steps to result in a clear and enticing offer to candidates.
2. **Clearly describe the role** and reach consensus on remuneration (this may require a market scan on rates). How this is worded is important so as to attract the right coaches to your offer of employment. Language and words matter here; agile coaches will be scanning the advert checking that the organisation understands agile and the role of the coach.
3. Understand your **overall workforce strategy** for agile coaches (section 3 of this paper). How many coaches of what type do you require and where will they be sourced from.
4. Get creative and be clear as you **communicate to the market**; coaches are only interested in organisations that understand the role of the agile coach AND have a strong sense of purpose underpinning the proposed change to agile; your messaging needs to reflect this.
5. Have an **agile coach capability assessment process** to ensure candidates are screened appropriately (avoiding imposter coaches). This is best designed by an industry expert agile practitioner/coach.

6. **Plan your interview process;** include demonstrations of capability via role plays that are designed to test competency (not agile theory). It is important to see the coach actually coach (not just talk about it).
7. **Execute interviews** with the help of an agile coaching expert; this is critical to avoiding hiring the wrong coaches for your needs
8. **Inducting, on-boarding** and making sure the coach understands how the team delivers the coaching service within the organisation.

Tips for the reader:

- Design and run a well-executed process using the above approach as your guide. Be sure to involve an expert agile coach throughout the end-to-end process.
- Always interview agile coaches with a new to agile (non-expert) together with a seasoned agile coach; both perspectives usually lead to a good result.

5. WHEN AND HOW TO DEVELOP AN INTERNAL AGILE COACHING TEAM

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5. WHEN AND HOW TO DEVELOP AN INTERNAL AGILE COACHING TEAM

If an organisation wants to deeply internalise agile into its culture, then committing to developing an internal agile coaching capability is recommended. There is nothing as powerful in sending the message that an organisation is taking the change to agile seriously as putting in place training and development pathways for internal staff to become agile coaches.

Internally developing a cohort of agile coaches has many benefits including:

- **COST;** compared to hiring in expert agile coaches internally developed coaches can, for some of the more basic coaching work, be utilised for approximately half the cost. Source has led such initiatives much to the disgust of the contractor agile coaching community; it displaces these “gun for hire” contractors with fit-for-purpose novice coaches. Of course, there is still a requirement for senior expert coaches to mentor and supervise the novice coaches; for this either contractors or permanent hires can be utilised.
- **CAREER PATHWAYS for displaced employees;** there is usually pressure to reduce headcount and improve efficiency in any organisation; do more with less. Whilst it is never recommended to conflate a cost-out/headcount reduction program with any agile change program, it is important to recognise that employees will often be displaced when a change to agile happens; old roles are no longer required, and people need to fill new positions as the organisation takes on a new design. Some of these displaced staff can be offered a development and redeployment agile coach role. Of course, screening for this program takes expert-level agile coaching knowledge, i.e. you do not re-purpose redundant project managers into agile coaches (this usually will fail).
- **SCALABILITY;** Source’s founder, Niall McShane, has led the design and delivery of an Agile Coach Academy for a large corporate undergoing an agile transformation. In this engagement he was accountable for delivering two cohorts of 25 agile coaches to meet the change needs of the organisation. Once the program was designed and deployed it allowed for a scalable model whereby new groups of coaches could graduate every three months following the completion of a twelve-month learning, development and mentoring program. Of course, this requires appropriate levels of workforce planning in advance.

Tips for the reader:

- Executing an internal agile coach development program is a significant undertaking and not one to be done without prior experience. It requires the highest levels of expertise and strong sponsorship and management controls to ensure the desired outcome is achieved. Partnering with an expert agile coach training provider is one way to ensure you get the capability uplift required.
- Often internal agile coach development programs are aligned with an internationally recognised certification provider; this is preferred but does not guarantee competency from the graduating agile coaches; this can only be assured through appropriate levels of on-the-job competency assessment by an experienced senior agile coach/trainer.

6. WHEN AND HOW TO PARTNER WITH A CONSULTING FIRM

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6. WHEN AND HOW TO PARTNER WITH A CONSULTING FIRM



In business (and life) one could make an argument that it is on the strength of your relationships that you will succeed or fail when taking on a challenge. Most things worth doing are best done as a team; where the collective wisdom and effort delivers a result that is (much) more than the sum of the individual parts/people. So as an organisation embarks on a journey of change it makes sense to partner with people who have already trodden the path you are about to take.

This all makes sense until you hear the horrible failure stories of consulting companies coming into organisations and doing the change to the people instead of embarking on the journey with the client. The best outcomes happen when the organisation and the consulting firm form a true partnership and co-design how the agile adoption program will run, including how and when to utilise agile coaches.

Source advises clients to strongly consider utilising a consulting company to help them along their journey; but the organisation cannot outsource its responsibility for the change. In your initial core team always aim to employ someone with extensive agile experience who can then select a consulting firm to support your initial efforts.

Tips for the reader:

Often 3-5 external consultants are enough to commence work on an agile change program (no matter how large your change aspirations are); the organisation can then quickly build its own capability to drive the change from within and slowly reduce the amount of consulting support required.

7. LEADING AND MANAGING AN AGILE COACHING TEAM

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7. LEADING AND MANAGING AN AGILE COACHING TEAM

Who is best placed to lead/manage the agile coaches?

In our experience we believe that agile coaches don't mind who leads or manages them as long as the leader/manager has respect and a level of appreciation for what the agile coaches do as practitioners. Here are some ideas when considering who could lead your team of agile coaches:

- Have your most experienced agile coach play the "tribe" leader for all the agile coaches (you could also have multiple tribes too, so the idea scales). Coaches respect and listen to other coaches, so appointing someone who is a practitioner to lead a team of agile coaches has its benefits. Of course, this assumes you can source an expert coach who also has leadership skills, which can be difficult.
- Consider appointing a non-agile coach who has exemplary people skills to manage the agile coaching team. The benefit in doing this is that you can draw from a larger candidate pool; essentially hiring for someone with great empathy, a good understanding of agile (although not an expert practitioner) and first-class people leadership capabilities.

I have seen both of the above options work well. I've also seen when novice agile practitioners are appointed to manage more senior coaches; this does not work well for all the reasons detailed above.

How to manage agile coach performance

This is a controversial topic that has traditionally been troublesome to answer; hopefully after reading this section you will feel comfortable placing expectations onto agile coaches re the outcome of their work. Agile coaches can be quite resistant to having their performance managed; mainly due to the negative perception of what performance management means. But looking at a definition we see that performance management aims to empower workers to be at their best

Performance management is a corporate management tool that helps managers monitor and evaluate employees' work. Performance management's goal is to create an environment where people can perform to the best of their abilities and produce the highest-quality work most efficiently and effectively.

Source: <https://www.investopedia.com/>

In order to monitor and evaluate an agile coach's performance it is important to know what outcomes you are expecting from their work. This is why section 2 of this paper (outcomes to expect from agile coaches) is so important and the reason it is one of the first decisions you need to make when considering using agile coaches.

The following list of metrics could apply to your agile coaching performance management framework regardless of whether the agile coaching outcomes are based on agile adoption or business agility:

- The Agile Coach's Net Promoter Score from customers (NPS)
- Reduction in Lead time to value (the time it takes from an idea to value being realised)
- Adoption of agile practices by teams
- Team happiness/engagement trending up
- Quality (of work delivered by the team being coached) measures improving
- Risk (in the work delivered by the team being coached) management is improving
- The cost (time/money/effort) to introduce business change is reducing
- Predictability of delivery (from the team being coached)

Where there is some heated debate amongst the agile community is in business outcomes/metrics/value and whether an agile coach should include these measures in their performance 'card'. If an agile coach provides advice and enables change, should they be held accountable for improved business performance from the teams they coach despite these outcomes not being in their direct control?

We at Source Agility recommend the answer be YES. Of course, the agile coach must influence through the team and raise blockers to value delivery but ultimately if the coach does not take on some measures that relate to business value then a serious risk arises; see next section.

Agile coaches that give advice but have no skin-in-the-game

An agile coach with no accountability for improving business outcomes becomes a non-player; they sit in the "cheap seats" giving advice but have no "skin in the game". Business agility coaches care about valuable outcomes that improve the performance of the organisation; they utilise agile practices as a means (i.e. agile is not the end result). As the agile movement matures, we at Source believe agile coaches will move towards accelerating business outcomes with agile practices rather than solely focusing on behavioural change and the adoption of new ways to work. It should be an "AND" not an "OR"; agile coaches enable the adoption of better ways to work but care just as much about the outcomes of the teams they coach. How much of each of the measures we put forward you include in your agile coach performance model will depend on your specific situation, so take these as suggestions to start working with.

Tips for the reader:

- Have your agile coaching team nominate who they want to represent them as practitioners. This can be included as consideration when management structures are being put in place to support / lead/ manage the agile coaching team.
- A co-design series of workshops with your agile coaching team would be the best way to build out a performance management model for the coaches. It is not recommended to impose measures onto your agile coaching team but co-create an agreed set of measures that encourage open and psychologically safe conversations on how to measure the impact of the agile coaching team's work.

8. WHEN AND HOW TO SCALE BACK YOUR AGILE COACHING CAPABILITY

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8. WHEN AND HOW TO SCALE BACK YOUR AGILE COACHING CAPABILITY

Some of the most unpleasant, cruel and unempathetic employee experiences I have witnessed have occurred when an agile coaching team is being wound down/reduced. It is perfectly legitimate to scale back the number of agile coaches as demand for their services lessens over the course of a change program; but the way it is managed is key to protecting an organisation's reputation and brand. If the experience of agile coaches or any employee as they exit an organisation is terrible then this creates a negative reputation in the market that can make attracting talent very difficult for years afterward.

If you have a means to adaptively plan for changes in agile coach demand and run a well-designed workforce strategy then reducing your agile coaching team numbers is not an unexpected negative experience for those leaving but a planned and well-signalled departure that has everyone parting ways with strong relationships and good will. Not doing this is at best mismanagement or at worst just plain lazy and treats people as resources to be traded. Agile coaches take this type of behaviour very seriously, word will get around in the agile coaching community and when you need to re-hire coaches, you'll find it hard to convince applicants that things will be different this time.

Tips for the reader:

Actively manage demand and supply of coaches as part of your adaptive workforce planning process. Signal early of your intent to reduce headcount and ensure any reductions are handled with empathy and care, ensuring a positive experience for the agile coaches leaving.

CONCLUSION AND FINAL WORDS

At Source we believe that agile coaches are THE critical enabler to cultural change and the adoption of new/better ways to work. Given they are an expensive and relatively difficult to attract and retain, this paper aims to give the reader a model to consider as they build an agile coaching team.

At Source Agility we:

- want to reduce the risk of your agile coaching team under-performing or not delivering the expected impact.
- are focused on accelerating business outcomes and value delivery in how we position the role of agile coach within a change initiative.
- see Agile ways of working as an enabler of business agility (a business that can change direction at low cost) and believe the agile coach should adopt the same mindset to their role.

The insights and ideas in this paper come from multiple firsthand perspectives from engagements with clients over the last 8 years; nothing here is theoretical, all of it is knowledge from learned experience. We hope you find this guide useful; reach out if you need to discuss any aspect of the paper or need help on your agile coaching journey.

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