

# Learning Objectives for Agile Facilitation and Coaching

*"Certification is the by-product; Learning is the product."*

## **Agile Facilitation and Coaching will:**

- Explore the basics of group facilitation tools and techniques and provide the learner the skills and knowledge to be able to apply these principles to group interactions for more productive discussions and better management of time and resources.
- Introduce the concepts of team development and provide the learner with the knowledge of how to start and grow teams through self-awareness, understanding of team dynamics and the organizational system.
- Provide the learner with an understanding of the mindset, role, and responsibilities of an agile team facilitator and an agile coach. The learner will be able to differentiate between mentoring, facilitating, consulting and coaching and will also gain the skills needed to communicate and coach effectively, and create a safe environment for healthy conflict and meaningful collaboration.
- Explore the common hurdles to implementing agile practices and provide the learner with skills to help teams overcome them.

## **Pre-requisites:** Fundamentals of Agile Learning Objectives

The purpose of the Agile Facilitation and Coaching track is to introduce learners to the concept of facilitating and coaching in the agile context. It covers the roles and skills needed by an Agile Team Facilitator and an Agile Coach, to appropriately lead and effectively facilitate, coach, mentor and teach agile teams. This track consists of the following eight primary *Topics*, the first three of which define what is needed for an Agile Team Facilitator, followed by five additional topics that are needed for an Agile Coach:

- 1. The Mindset and Role of the Agile Team Facilitator:** The purpose of this topic is to understand the most fundamental functions of an Agile Team Facilitator including facilitating the agile practices, fostering collaboration amongst team members, and generally supporting a self-organized team.
- 2. Facilitation Tools and Techniques:** Understand the role of a facilitator and the tools an agile facilitator or coach uses from the facilitation role in the context of an agile team. New coaches may begin by facilitating various team practices, then grow through exploration of advanced facilitation concepts, facilitating larger or more diverse groups, and facilitating deeper conflicting issues.
- 3. Facilitating the Agile Practices:** The primary role of the agile team facilitator or coach is to empower the agile team toward a successful outcome. This requires identifying common hurdles to the implementation of key agile practices, as well as applying the coaching skills needed to help teams overcome their own hurdles and successfully execute the practice.
- 4. The Mindset and Role of the Agile Coach:** Through the coach's own self-awareness and understanding of team dynamics and the organizational system, the coach can be better prepared to help agile teams work with these structures to plan and manage

agile adoption. The purpose of this topic is to understand the relationship between agile and coaching in order to coach, facilitate, mentor and teach an agile team. And, to understand the relationship of a coach to a self-organized team.

- 5. Coaching & Communicating Effectively:** Coaches and team members alike know that effective communication is critical to team success. Similarly, expanding communication capacities and skills of every team member is also critical. The coach plays a role in setting an example through their own communication clarity and conciseness, openness to feedback and differences, self-acknowledgement of being wrong, and inclusion of all. The coach fosters a safe environment for open communication through setting this example and encouraging others to mimic it. The purpose of this topic is to explore the value that effective professional coaching and communication brings to the team, including purposeful participation, effective use of silence, how to surface healthy conflict, and conflict management and resolution.
- 6. Mentoring and Coaching People:** Mentoring and coaching are decidedly distinct yet complementary. As team members transition to (or become more adept at) their agile roles, the agile coach is in a position to mentor their personal and professional growth by sharing the knowledge and insights they have learned. In addition, using professional coaching skills, the agile coach can help them find their own pathway to agility. In the Agile context, mentoring and coaching helps people step into their agile role fully and to transition to the agile mindset.
- 7. Starting Up Teams:** Effective coaching starts by helping agile team members see what is occurring within themselves, with others, and around them in their environment. The purpose of this topic is to create a level of comfort with exploring individual and team preferences, perform start-up activities such as project and team chartering, self-organization team constructs, being comfortable in learning through doing, starting before you have all of the answers, creating definition of done and other social contracts, defining roles and responsibilities, etc.
- 8. Growing and Developing Teams:** Teams are a social construct whose purpose is to capitalize on individual strengths toward a common goal. The agile coach understands the difference between a group and a team, when to build a team, how to facilitate the different stages of team development and how each stage may impact the adoption of certain agile practices. Effective agile coaching means understanding when to seamlessly alternate between pushing for results and stepping back to focus on the team's development, or dancing between teaching, facilitating, mentoring or coaching. This critical difference can greatly impact the success of the project or product, as well as the organizational culture change that needs to occur within and around the team. An agile coach understands how high performing teams are formed and maintained, in general, as well as how to grow and develop teams toward their potential, given each team's specific case.

## Types of Agile Coaches

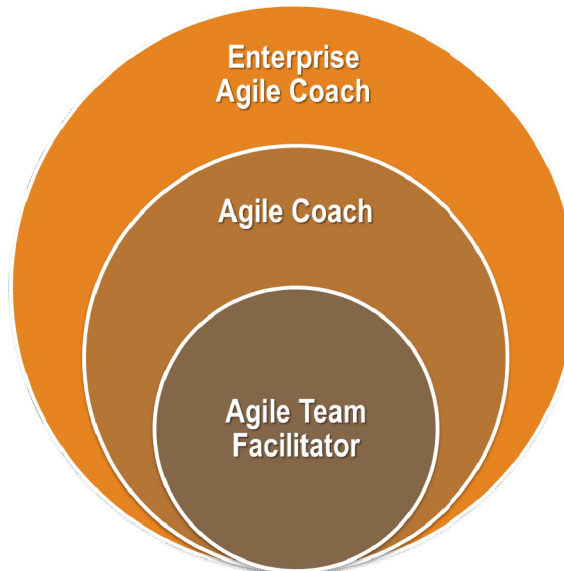
The Facilitation and Coaching Track differentiates between three different types of agile stewards: the Agile Team Facilitator, the Agile Coach and the Enterprise Agile Coach. Each type of steward has progressively more experience and broader responsibilities within the organization. This track currently addresses learning objectives for the Agile Team Facilitator (Topics 1-3) and continues on to the Agile Coach (Topic 4-8). The ICAgile Coach designation requires all eight Topics' learning objectives be completed. The learning objectives for an Enterprise Agile Coach will be covered in a separate track.

### Agile Team Facilitator (ATF)

- An ATF is developing the basic skills of facilitation, mentoring or training and conscious communication, typically within the confines of one or two agile teams. An ATF is not responsible (or qualified according to this curriculum) for Agile adoption or transformation initiatives but rather they are more suited to facilitate the activities of an agile team.

### Agile Coach (AC)

- An Agile Coach is an ATF who has achieved an expert level in lean/agile practices and one or more knowledge domains (technical, business, etc.) while having developed some professional coaching skills and a significant level of skill in facilitation and mentoring and/or training. The Agile Coach's purview is multi-team, starting up new teams, mentoring ATFs and looking out toward the wider organization.



### Enterprise Agile Coach (EAC)

- The Enterprise Agile Coach (not addressed in this track) is an Agile Coach who has achieved advanced systems coaching, organizational development, culture, change management and leadership skills and uses those skills to affect organizations at large. The Enterprise Agile Coach works at all levels in an organization to help the organization use agile as a strategic asset for business value generation, which often includes culture change.

## How to read & use this document

This document is not a description of a course – it is a description of what a learner (agile team facilitator and/or agile coach) will encounter in courses, or study to learn, to become proficient in facilitating and coaching agile teams.

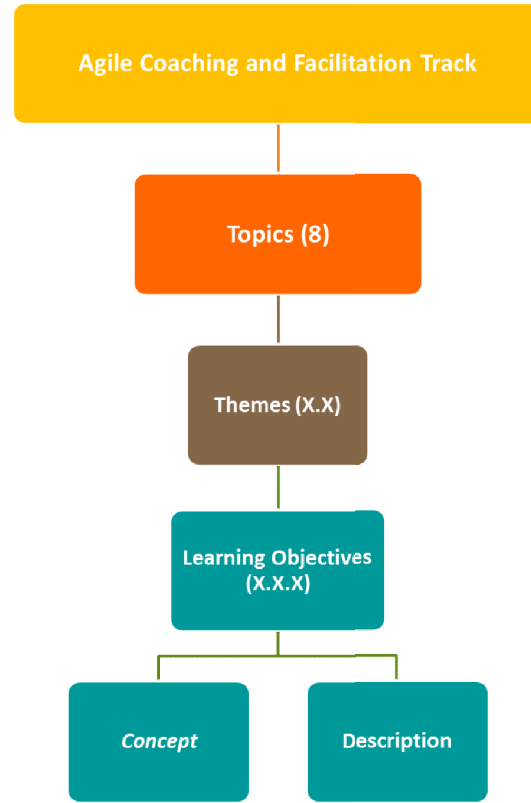
These learning objectives are intended to support any of the agile methodology variants and apply to individuals and teams with varying skills and backgrounds.

The Agile Facilitation and Coaching track is constructed around 8 primary *Topics*, with *Themes* and *Learning Objectives (LO)* for each. Watch, in each section, for *concept* elements, where a concept is introduced; and *description & application* elements, where the learner gets to learn a technique, practice, or apply a concept.

## Curriculum Design & Certifications

The contents of the learning objectives for this track require 5 or more days of instruction to cover adequately. At ICAgile, we encourage instructors to take more time (i.e. during class and between classes) to cover the material, to let the learner embed the learning and have experience applying the concepts. We find that "embedding time" is key to conveying the concepts and skills needed as an agile team facilitator or agile coach. Acceptable course designs must be heavily weighted toward application of these skills.

Finishing all 8 *topics* results in the learner earning two certifications – the *ICAgile Team Facilitation Certification* and the *ICAgile Coaching Certification*. In order to receive a certification for *ICAgile Team Facilitation* a learner must have completed one or more courses covering all three ATF topics. In order to receive a certification for *ICAgile Coaching* a learner must have completed one or more courses covering all five AC topics plus the three ATF topics.



Topics	ICAgile Team Facilitation Certification	ICAgile Coaching Certification
1. The Mindset and Role of the Agile Team Facilitator	✓	✓
2. Facilitation Tools and Techniques	✓	✓
3. Facilitating the Agile Practices	✓	✓
4. The Mindset and Role of the Agile Coach		✓
5. Coaching and Communicating Effectively		✓
6. Mentoring and Coaching People		✓
7. Starting Up Teams		✓
8. Growing and Developing Teams		✓

Instructors are expected to include group activities of their own design and to incorporate their own, personal specialties that highlight particular aspects of coaching and facilitation models and techniques. The hours next to each topic are meant to convey a general sense of how deep one should go to adequately convey the topic. They are not meant to be followed verbatim.

# 1. The Mindset and Role of the Agile Team Facilitator ~3-4 hrs

## 1.1. Theme: The Agile Team Facilitator Mindset

### 1.1.1. Defining Agile Team Facilitation

*Agile Team Facilitators are journeyman Agile Coaches who keep an agile team running and growing.*

Purpose: To define the purpose, mindset and functions of an Agile Team Facilitator. At the most basic the purpose of an Agile Team Facilitator is to facilitate the agile practices, foster collaboration amongst team members, and generally support a self-organized team.

### 1.1.2. Agile Team Facilitator Behaviors

*Agile Team Facilitators behave in ways that are consistent with agile.*

Purpose: To set the expectation that Agile Team Facilitators behave in ways consistent with agile and are agile role models. This includes becoming aware of, and growing into, the embodiment of agile that one expects from an Agile Coach, namely embracing servant leadership and displaying the behaviors that come with key mindset shifts detailed in *4.1 Agile Coaching Mindset*.

## 1.2. Theme: Development Path for Agile Coaching

### 1.2.1. Defining an Agile Coaching Development Path

*Effective agile coaching requires that people take their development one step at a time, obtaining mastery at each step before moving on.*

Purpose: To lay out the developmental progression from Agile Team Facilitator to Agile Coach to Enterprise Coach. An Agile Team Facilitator (ATF) is a journeyman Agile Coach. Knowledgeable in lean/agile practices, the ATF is developing the basic skills of facilitation, mentoring or training and conscious communication, often within the confines of one or a few agile teams. The Agile Coach is an ATF who has achieved an expert level in lean/agile practices and one or more knowledge domains (technical, business, etc.) while having developed some professional coaching skills and a significant level of skill in facilitation and mentoring and/or training. The Agile Coach's purview is multi-team and looking out toward the wider organization. The Enterprise Coach (not addressed in this track) is an Agile Coach who has achieved advanced systems coaching, organizational development, culture change and leadership skills and uses those skills to affect organizations at large. The Enterprise Coach works at all levels in an organization to help the organization use agile as a strategic asset of culture change and business value generation.

### 1.2.2. Assessing one's ability to serve the team

*Teams move into patterns of health and dysfunction continually. The Agile Team Facilitator or Agile Coach uses diagnostics to determine the nature of the situation so that they can decide whether to serve the team solo or get help.*

Purpose: To provide the learner with a one or more models for assessing healthy team functioning, especially the ability to identify clearly dysfunctional behaviors or circumstances. This LO also provides suggestions for dealing with such dysfunctional patterns and offers indications for when to call in more advanced agile coaching skill.

### **1.2.3. Calling for More Advanced Agile Coaching Skill**

*Agile Team Facilitators and Agile Coaches respect the current boundaries of their knowledge and skills and call in more advanced agile coaching when needed.*

Purpose: To set the expectation that agile coaching is an ATF/AC/EAC team event. Successful agile coaches (at any level) do not go it alone. Instead, they call on the skills and knowledge of the next developmental level when faced with situations they are not equipped to handle. For example, an Agile Team Facilitator would call on the help of an Agile Coach or Enterprise Agile Coach when faced with difficult conflict in the team, or when starting up a new team, or when the team has stagnated and is regressing. These are opportunities for the team to get the level of skill they need and for the Agile Team Facilitator to learn from the more advanced coaches. This LO will offer model(s) or diagnostic(s) that help the ATF know when to call for the assistance of an AC or an EAC.

## **2. Facilitation Tools and Techniques ~ 8-10 hrs**

### **2.1. Theme: What is Facilitation?**

#### **2.1.1. Definition of Facilitation**

*A facilitator is someone who helps a group identify common objectives and then offers group processes to achieve that defined outcome while maintaining neutrality.*

Purpose: To level set on the definition of a facilitator as a neutral process owner for group work and decision making.

#### **2.1.2. Theme: The Facilitator Stance**

*Facilitators consciously embody self-awareness, self-management, bias management, and convey openness and enthusiasm while maintaining an allegiance to the 'power of teams' over individual contributors.*

Purpose: To help the learner understand and embody the characteristics of a good facilitator.

#### **2.1.3. Theme: Agile Team Facilitator**

*An Agile Team Facilitator is both the agile process owner and the facilitator of team practices.*

Purpose: To help the learner effectively navigate the sometimes contradictory roles of unbiased facilitator and guardian of the agile team practices.

### **2.2. Theme: Facilitating the Meeting**

#### **2.2.1. Designing Meetings for Collaboration**

*Effective meetings have clear objectives, purpose, outcomes, a defined set of attendees, and an intended process for accomplishing the objectives.*

Purpose: To provide the learner with a set of planning tools and techniques to design effective meetings, including a process to clearly identify the objectives and intended outcomes, a detailed facilitator guide or script, selecting the right participants, and identifying potential issues.

### **2.2.2. Using the Meeting Organizing Tools**

*Facilitated meetings are well structured and organized to provide consistency to the participants.*

Purpose: To provide the learner with an understanding of common meeting tools, their purpose, and when and how to use them. Facilitators use a variety of meeting organization tools including; parking lot, group norms, and room setup.

### **2.2.3. Facilitating Full Participation**

*Great ideas come when all team members are involved, engaged and all ideas are shared.*

Purpose: To expose the learner to different techniques to garner full participation without promoting chaos such as; brainstorming, silent working, prioritization, multi-voting, etc.

### **2.2.4. Advanced Facilitation Techniques**

*Advanced techniques such as visual facilitation, games, and simulations provide groups with access to alternative modalities and channels, to elicit ideas and get a group energized around an idea or topic.*

Purpose: To make the learner aware of more advanced tools and concepts in group facilitation.

## **2.3. Theme: Facilitating Collaborative Conversations**

*It's common for conversations to be mediocre – improving conversation quality leads to better understanding, fuller collaboration and remarkable results.*

Purpose: To give learners techniques to facilitate better, more meaningful intra-team dialogues by maintaining awareness of one's own style, gaining understanding and acceptance of other styles, and increasing the capacity to give and receive feedback. Through better conversation teams establish shared understanding, context and create better results.

## **2.4. Theme: Facilitating Team Decision-making**

*Being able to come to decisions is a critical function for a team, frequently problematic, and essential for moving teams to action.*

Purpose: To familiarize the learner with decision making frameworks and how to select an appropriate one. Additionally the learner should know how to clarify scope of authority and know when to move toward a decision and when to let it 'brew'.

## **2.5. Application: Facilitating a meeting**

***.2.5.1. The ability to neutrally facilitate a session cannot be demonstrated by reading or lectures alone, but only by doing it.***

Purpose: To practice using some of the facilitator tools and mindsets in the context of an actual meeting that occurs within the agile framework. This application allows the learner to practice the many facilitation skills they have just learned.

### 3. Facilitating the Agile Practices ~ 6-8hrs

*Preamble: The purpose of the learning objectives in this section is not to introduce the learner to the basics of the various Agile practices (that is covered in Agile Fundamentals), but to extend their knowledge of the practices from Shu to Ha including exposure to multiple facilitation methods, when to choose which, and how to avoid common facilitation pitfalls.*

*Each Agile practice has its own purpose, desired outcome and timebox. When facilitating, it is key to hold to these and to bring awareness to the team when they have veered off to help them come back.*

#### 3.1. Theme: Choosing the Level of Facilitation Intervention

*Enhance the team's self-sufficiency by consciously choosing the amount of facilitation.*

Purpose: To help the learner to become choiceful about the amount of facilitation required, keeping in mind that the level of involvement differs as the team matures and as they begin to take on facilitation duties themselves.

#### 3.2. Theme: Instilling the Agile Mindset

##### 3.2.1. Manifesting the Agile Mindset

*More often than not, agile teams are doing the agile rituals (practices) without understanding the depth and usefulness (essence) of them.*

Purpose: To emphasize the role the Agile Coach or Agile Team Facilitator holds in ensuring that the team's practices uphold the agile mindset, values and principles and that they remain full of meaning and purpose.

##### 3.2.2. Exposing Waste

*A mindset of reducing and eliminating wasteful activities, events and artifacts ensures that an agile team remains value-driven and lean.*

Purpose: To help the learner adopt and impart a mindset of identifying waste, making it known to the team, then facilitating the team's decision on whether to reduce, eliminate or ignore it. The ultimate aim is to instill in the team sensitivity to waste and intolerance of its existence.

#### 3.3. Theme: Chartering

##### 3.3.1. Project Chartering

*Performing Project Chartering is essential to the healthy start of an endeavor because it provides alignment.*

Purpose: To bring the learner's attention to what is essential and not essential in project chartering and to avoid common pitfalls of facilitating project chartering work sessions such as the absence of essential stakeholders, the business case being non-existent or goals not measurable, or business people or key team members not engaged. To create charters that have teams start with a shared context, product and team vision, and goals at all levels (individual, team, company, world). Note: Chartering is an activity and that may or may not result in a document.

### 3.3.2. Team Chartering

*Performing team chartering helps align the team and gives them ownership around how they are going to work together.*

Purpose: To bring awareness to the importance of team specific topics (e.g. definition of done, iteration length, stand up time) being defined by the actual team rather than management.

## 3.4. Theme: Planning

### 3.4.1. Release Planning

*Release planning sessions are the cornerstone to setting business direction and establishing general expectations.*

Purpose: To bring the learner's attention to multiple ways of conducting release planning and when to choose one way over the other. Additionally, this LO educates the learner on avoiding common pitfalls of facilitating release planning sessions (e.g. over or under-committing, not accounting for bugs, spikes, and stabilization or planning to deliver lower value over higher value to accommodate an impediment or dependency, not delivering end-to-end value, etc.).

### 3.4.2. Iteration Planning

*Iteration planning sessions should be venues for discovering innovative approaches and knowledge sharing instead of just tasking out work.*

Purpose: To bring the learner's attention to multiple ways of conducting iteration planning and when to choose one over the other. Additionally, this LO emphasizes facilitation that enhances whole team collaboration, knowledge transfer, and cross-functional interaction and avoids common pitfalls (e.g. people are checked-out, business people getting into the "how", domination by an expert, tool-centric interaction, etc.)

## 3.5. Theme: Day to Day – Inside an Iteration

### 3.5.1. Protecting the team boundary

*Staying focused is critical to team success; therefore the Agile Team Facilitator or Agile Coach ensures that team members are able to focus on their commitment*

Purpose: To equip the learner with techniques to foster and help the team build an environment of focus which includes the ability to push away interruptions, distractions and additional work. This LO illustrates how to use the agile process to respectfully manage scope at the iteration and story level.

### 3.5.2. Stand-ups

*Stand-ups are the heartbeat of the team's cadence providing cohesion and commitment. Stand-ups can either launch the team into their work or become an empty, depleting ritual.*

Purpose: To bring the learner's attention to various techniques to keep the stand-up fresh while ensuring it remains useful and "on purpose". This LO emphasizes facilitation that safeguards the stand-up as a venue for daily commitment, raising impediments, and keeping momentum while avoiding common pitfalls (i.e. going longer, reporting in, turning into a status meeting,

veering into the purpose of another meeting, disengaged members, becomes boring, etc.).

### **3.5.3. Retrospectives**

*Retrospectives are one of the essential practices to ensure the team inspects and adapts its behavior and process. Retrospectives can either help the team continuously improve, or can create team dysfunctions.*

Purpose: To familiarize the learner with at least 10 facilitation techniques for retrospectives and help them know when and how to use them to design and conduct retrospectives suitable for the team's current situation. Retrospectives provide a fresh perspective on the previous iteration (or other timeframe) so that the team can surface issues, celebrate success, brainstorm solutions, and choose the top insights that will make a positive difference in the next iteration. This LO conveys the key elements (e.g. trust, safety check, ground rules, prime directive) that help retrospectives be productive and also illustrates how to work through common pitfalls (e.g. turning into a complaint session, lack of safety and fear of repercussions, non-collaborative, etc.).

## **3.6. Application: Designing Meetings for Team Interaction**

### ***3.6.1. Meetings that run well are well designed.***

The purpose of this application is to allow the learner to design their facilitation approach to different meetings and conversations under different circumstances and stages of team maturity so that they can see how the facilitation approach, process and organization will change in various situations.

## **3.7. Application: Facilitating a Standup**

### ***3.7.1. It's essential to be able to change one's facilitation style based on the maturity and needs of the group.***

Purpose: To practice facilitating a meeting under various conditions, specifically facilitating a standup, for a team new to agile, for a team that has been using agile for a while but has lost the purpose of the standup, and/or for a team that is fully functional and healthy with the standup. This application allows the learner to see how their facilitation style must adjust as the team matures (or regresses).

## 4. The Mindset and Role of the Agile Coach ~3-4 hrs

### 4.1. Theme: The Agile Coaching Mindset

#### 4.1.1. Defining Agile Coaching

*Effective agile coaches are clear about the purpose of their role and the mindset required to be a good (even great) agile coach.*

Purpose: To define the purpose and mindset of an Agile Coach. Agile coaching is defined as a set of behavioral competencies in this LO so that agile coaches can see which behaviors to move away from and which to move toward. In addition, the various high level skill sets or disciplines of an agile coach (coaching, facilitating, mentoring and teaching, etc.) are taught in this LO, to expose the learner to the full spectrum of the Agile Coach's job.

#### 4.1.2. Coach as role model

*Effective agile coaches are the "first agilist"*

Purpose: To make the case that personally embodying the agile values and principles is a key component of being an Agile Coach and to give the learner practical advice on how to do so.

#### 4.1.3. Servant Leadership

*Effective agile coaches employ a "servant as leader" style when they take up leadership with people, teams and organizations.*

Purpose: To explain and make practical the concept of servant leadership, going back to the roots of the idea as originally conceived by Robert Greenleaf. Specifically, that servant leadership means more than getting the team coffee and pizza and, in fact, guides an Agile Coach's behavior in the proper application of "servant as leader" to build capacity in others, to remove one's self from the center of the action and attention and to serve the best interests of what's emerging in the environment.

#### 4.1.4 Key Mindset shifts

*Effective agile coaches successfully make some key mindset shifts and serve as a living example of how one can thrive within these new mindsets.*

Purpose: To expose the Agile Coach to key mindset shifts and help the coach see ways to live these shifts in their own lives. Key mindset shifts may include: focus on team improvement over specific results; focus on business value-driven delivery over achieving scope, schedule or budget targets; focus on the leverage in the present moment over the past or future; focus on staying curious and seeing the best in people over judging or manipulating; focus on assisting the team in achieving their commitment and learning when they do not achieve it rather than stepping in and doing it for them.

### 4.2. Theme: Responsibilities and Skills of the Coach

#### 4.2.1. Roles and Responsibilities of the Coach

*Effective agile coaches know the parameters of their job. They avidly take up their responsibilities and help others take up theirs. They clearly articulate the difference (or overlap) between their role and that of others, such as product owner, project manager, program manager and functional manager.*

Purpose: To list the duties and skills (as opposed to the mindset) of the Agile Coach job and contrast them with the duties of other roles (i.e. product owner, project manager, program manager and functional manager) so that the coach fully understands the difference between a coach and other team members and can negotiate their role within a given context of other roles in their organization so they can healthfully coexist and help others fully take up their roles in ways that enhance the practice of agile. *Note: In some organizations the coach may fill one or more additional roles on the team, in which case the purpose of this LO is to help them differentiate their own role boundaries and help others take up their roles fully and in ways that enhance the practice of agile.*

#### **4.2.2. Skills of the Coach**

*Effective agile coaches consciously choose which skills to employ in each moment to best serve the people, teams and organizations they coach.*

Purpose: To provide guidance on how an Agile Coach chooses and/or combines the skills in each moment (coaching, mentoring, facilitating, instructing, leading, etc.) that will best serve the situation. Practical advice on which to choose and how, along with skills to cultivate the needed self-awareness and self-management are taught in this LO.

#### **4.2.3. Calling for More Advanced Agile Coaching Skill**

*Agile Coaches respect the current boundaries of their knowledge and skills and call in more advanced agile coaching when needed.*

Purpose: To set the expectation that successful agile coaches (at any level) do not go it alone. Instead, they call on the skills and knowledge of the next developmental level when faced with situations they are not equipped to handle. For example, an Agile Coach would likely call on the help of an Agile Enterprise Coach when faced with intractable conflict in a team, or when coaching leaders who are faced with making behavioral changes that enable agile, or when working with a large-scale culture change. These are opportunities for the team or organization to get the level of skill they need and for the Agile Coach to learn from the Enterprise Agile Coach. This LO will offer models(s) or diagnostic(s) that help the AC know when to call for the assistance of an EAC.

### 4.3. Theme: Setting boundaries for Coaching

#### 4.3.1. What is a coaching “contract”

*When they begin work with a team and its business unit, effective agile coaches make agreements with key stakeholders (e.g., management, the team) on how the coaching work will proceed. This involves those directly affected (e.g., the team) as well as those “paying for” or authorizing the coach’s services (e.g., management or sponsor).*

Purpose: To help the learner understand the importance of a coaching contract, that it is not a “legal” contract but rather an agreement between the parties.

How to negotiate such an agreement, why it’s important to coaching success, how it helps bound what the coach agrees to do (e.g., start-up and run a new Agile team for 3 months) and what the coach will not do (e.g., give performance management evaluations for team members), as well as what the “client” will do (e.g., provide training for the team, make a candidate Agile Team Facilitator available from within the team, etc.) are all components of this LO. Effective agile coaches, whether they are internal employees or external consultants, see their work similarly to that of a collaborative consultant (see for instance Peter Block, Flawless Consulting), which is why the coaching contract is an appropriate learning topic for all agile coaches.

#### 4.3.3. How to design a coaching alliance

*A coaching alliance is the other side of the coaching contract. Where the contract provides the conditions for the work (boundaries, time, roles, etc.), the coaching alliance is less formal but more personal.*

Purpose: To help the learner understand elements of designing a coaching alliance including creating rapport, key questions to ask, tone of the discussion, and hoped for outcomes. It answers questions such as how do the individuals or the team as a whole want to be coached? How would they like to receive feedback? How will the coach know when she has challenged the team “too far” or “not enough?” Will they help the coach get better at coaching them in the unique way they need to be coached?

### 4.5. Theme: Self-Awareness / Self Managing

#### 4.5.1. Achieving self-awareness / self-management in the coach

*Self-management is a critical agile coaching skill that can be learned and increased.*

Purpose: To help the learner understand one or more models of self-awareness that will impact their ability to be an effective agile coach. Further, this LO is concerned with giving the learner techniques for managing themselves, their biases, assumptions and emotions within a coaching context. To be effective, the agile coach must be both self-aware (e.g., know when she is biased about a given topic) and use self-management (e.g., not let her bias affect how she facilitates the meeting). There are many models of self-awareness (e.g., emotional intelligence, Myers-Briggs, various personality inventories, various self-awareness mindfulness techniques) that can guide the coach. Most important is to choose at least one and apply it.

#### **4.5.2. Building self-awareness / self-management capacity in the team**

*The same issues of self-awareness and self-management apply to the team as well as the agile coach.*

The purpose of this LO is give the learner tools to use with their teams to increase the team's capacity for both self-awareness and self-management. Lack of self-management within the team can lead to unproductive conflicts. Lack of self-awareness can lead to a team member not even knowing when they are being domineering or non-collaborative.

### **4.6. Application: Establish a coaching contract or coaching alliance**

#### **4.6.1. Will allow an experience of using the concept of a coaching contract and/or of a coaching alliance in a realistic environment.**

Purpose: To practice creating a coaching contract and/or a coaching alliance within a particular set of circumstances. The exercise should be structured so that the learner completes all the elements of either a coaching contract, a coaching alliance, or both.

## **5. Coaching & Communicating Effectively ~8-12 hrs**

Note: The term "client" is generically used to mean anyone the agile coach coaches and applied to internal agile coaches as well as external agile coaches.

### **5.1. Theme: The Coaching Stance**

*Coaches consciously support the client's goals and directions (their agenda) as opposed to the coach's own agenda "for" the client.*

Purpose: To help the learner understand and embody the characteristics of a professional coach (reference: ICF Competencies) and to land the idea that agile coaches employ self-awareness and self-management to prevent imposing their agenda on the client.

#### **5.1.1 Maintaining Neutrality**

Purpose: To help the learner understand and embody the characteristics of a professional coach regarding being neutral with respect to the client's values, preferences and decisions.

#### **5.1.2 Self Awareness and Self-Management**

Purpose: To help the learner understand and embody the characteristics of a professional coach by being aware of personal reactions and biases with respect to the client and managing those reactions in a way that supports the client's autonomy and growth.

#### **5.1.3 Holding the Client's Agenda**

Purpose: To help the learner understand and embody the characteristics of a professional coach in terms of helping the client identify and articulate the client's own agenda for growth and development. The coach then supports this agenda in various ways.

#### **5.1.4 No Colluding**

Purpose: To help the learner understand and embody the characteristics of a professional coach regarding not colluding with the client when they do not

strive fully for what they really want to achieve. Without criticism, the coach is a clear reflection when the client “plays small,” urging the client to reach for their goals.

## **5.2. Theme: The Coaching Conversation – Coaching for Action**

*Coaching conversations integrate various coaching skills into a fluid process that helps move individuals toward achieving their goals.*

Purpose: To help the learner understand one or more models for conducting the coaching conversation, moving the client from issue identification to exploration to action in a complete conversational arc.

### **5.2.1 Issue Identification**

Purpose: To help the learner understand techniques for coaching others as they identify the issues they want coaching on. This may involve sorting, prioritization, uncovering underlying issues, etc.

### **5.2.2 Issue Exploration**

Purpose: To help the learner apply various techniques to help the coaching client explore the issue(s) they have raised. Techniques might include active listening, reflecting non-verbal communications, brainstorming, perspective shifting, values clarification, etc.

### **5.2.3 Action Commitment**

Purpose: To help the learner understand techniques for helping the coaching client move into effective action after she/he has identified and explored the relevant issue, thereby helping the client take responsibility for their actions and their results.

## **5.3. Theme: Communication Skills for Coaches**

### **5.3.1. Presence**

*Being fully present as a coach is key to successful coaching. Methods for presence include attentive or active listening, monitoring the three levels of listening, awareness of the environment, self-management, and consciously preparing for coaching.*

Purpose: To teach the importance of presence and provide the learner with techniques and methods for achieving it.

### **5.3.2. Powerful questioning**

*Powerful questions are open ended, thought provoking questions that trigger curiosity and stimulate creativity and new insights. For example; rather than asking “Did that work?” regarding an action the client took, the coach may ask “What did you learn?”.*

Purpose: To familiarize the learner with the concept, examples and application of powerful questions.

### **5.3.3. Giving and receiving feedback**

*Being able to openly receive and provide effective feedback that builds people up instead of tearing them down is essential to helping individuals achieve their potential.*

Purpose: To provide the learner with techniques for giving effective feedback to coachees and being open to receiving feedback from coachees and other coaches.

## **5.4. Theme: Basics of Using Emotional Intelligence**

*There is a vast body of research showing that emotional intelligence (EQ) is a better differentiator of top performance than cognitive intelligence (IQ). Unlike IQ, EQ can be developed and improved.*

Purpose: To understand one of the models for Emotional Intelligence, ways Emotional Intelligence can be improved and the business case for improving or raising EQ.

## **5.5. Theme: Internal vs. External Coaches**

*Internal coaches and external coaches work under different constraints. Understanding the differences and limitations between the two and being able to adapt is crucial to success.*

Purpose: To understand the key differences between internal and external coaches, identify the unique challenges faced by internal coaches (i.e. maintaining neutrality and confidentiality, holding people accountable and challenging the status quo) and how to adapt given the current situation.

### **5.5.1 Internal Coaches**

Purpose: To help the learner understand the unique challenges of being an internal coach, and that it does not prevent them from maintaining the coaching stance (i.e. maintaining neutrality, not colluding, supporting the client's agenda, etc.). Structures and approaches for maintaining the coaching position without compromising their job are covered here.

### **5.5.2 External Coaches**

Purpose: To help the learner understand the unique challenges of being an external coach, such as the need for effective systems entry, treating the client system with respect for the choices it has made, balancing challenge with respecting the pace of change that can be assimilated, etc.

## **5.6. Application: Conducting the Coaching Conversation**

### **5.6.1. Will allow an experience of using the concept of a coaching conversation in a realistic agile setting.**

The purpose of this application is to practice having a coaching conversation from beginning to end, including identifying the issue(s) for coaching, exploring the issue, and helping the client come to an action commitment.

## 6. Mentoring and Coaching People ~3-4 hrs

### 6.1. Theme: Understanding the Individual Change Cycle

*Whether they are just beginning in Agile, or as they develop into skilled practitioners, individuals on Agile teams are confronted with the need to learn new skills, develop new mindsets and engage in new relationships with their colleagues. In short, they are required to change.*

Purpose: To expose the learner to one or more models for how individuals change, grow and learn. Such a model should distinguish between self-chosen change and organizationally imposed change. It should also emphasize the need to “meet a person where they are at” in their change process, rather than the coach imposing their beliefs or needs.

### 6.2. Theme: Mentoring and mentoring practices

*A mentor facilitates personal and professional growth in an individual by sharing the knowledge and insights they have learned.*

Purpose: To provide the learner with a model or explicit definition of mentoring (e.g., creating relationship, establishing goals, creating an action plan, giving feedback, etc.). In the Agile context, mentoring may be around the roles, transitioning to the Agile mindset, or when and how to incorporate practices at various organizational levels. There are models for how to create a good mentoring relationship, how to establish goals, helping the mentee create an action plan, etc. There is an inherent tension between giving direct advice as a mentor as opposed to helping the mentee explore options for themselves. Therefore, this LO contextualizes the mentoring role within the Agile context, and compares mentoring to coaching (defined elsewhere) and explores when to use which skill and mind-set.

### 6.3. Theme: Mentoring and coaching the roles in Agile

*The Agile roles, whether on the core team or part of the stakeholder community, may require both coaching and mentoring because people’s roles often change upon adopting an Agile framework. Knowing when to coach and when to mentor is a key success criteria.*

Purpose: To differentiate coaching and mentoring, help the learner decide when to use each and to articulate the purpose of assisting people in their new Agile roles through teaching, mentoring/coaching, supporting success and helping learn from failure to increase the learning. These roles may include product owner, testers, developers, analysts, managers, other agile coaches and other stakeholders such as customer or executives.

### 6.4. Theme: Mentoring and coaching the key transitions for the roles in Agile

*Everyone goes through some kind of transition in their role when they encounter agile and an Agile Coach helps them through that transition.*

Purpose: To help the agile coach understand the typical transitions faced by the people in various roles when agile is brought in, such as analysts who will

move out of the customer/team intermediary role, testers who need to become part of the action rather than ‘victims’ at the end of the cycle, product owners who need to focus on the “what” and “why” of the product rather than managing to a schedule, and agile managers who need to become agile enablers rather than problem solvers. This LO presents key transitions, such as these, and also offers critical success factors or key failure modes for each.

### **6.5. Theme: Identifying and handling resistance from individuals**

*Agile coaches use resistance rather than resisting resistance.*

Purpose: To help the learner understand how to work with resistance from individuals as they take up their agile roles, rather than seeing resistance as an indication of failure or something to be solved. In this LO, the learner is exposed to at least one model for working with resistance as information and as a resource for moving forward with greater depth and real buy-in from the people experiencing the resistance.

### **6.6. Application: Problem scenarios - Mentoring vs. Coaching in pairs**

Purpose: To practice mentoring and/or coaching a particular role in a particular circumstance. To practice opening the conversation and working through the flow between mentoring and coaching, either by doing it and/or by talking through the thought process of how you would do it.

## **7. Starting Up Teams ~6-8 hrs**

### **7.1. Theme: Understanding Team Development**

*Understanding how a team develops is crucial for starting up a new team, including how to work with the issues of team dynamics, team developmental stages, how development progresses and the choice to become a team in the first place.*

#### **7.1.1. Understand a model of team development**

*Agile Coaches understands and use one or more models to illustrate how teams develop.*

Purpose: To familiarize the learner with one or more models for how teams develop over time, including the attributes, stages and factors leading to increased cohesion, camaraderie and team performance.

#### **7.1.2. Understand how to detect a team is at a certain stage of development**

*Agile Coaches detect the development level of their team and tailor their approach to be appropriate for that level, as well as for calling the team forth to the next level.*

Purpose: To help the learner detect the team’s current developmental level and to use that information when designing and conducting the team start-up, or to recover from inaccurately detecting the team’s developmental level from an earlier point in time.

### **7.1.3. Understand how to help a team move up the development curve**

*Agile Coaches use their facilitation and coaching skills--in conjunction with one or more team development models--to help teams advance.*

Purpose: To present key methods for helping a team advance through team developmental levels, both in setting the stage for doing so during the team start-up and ‘in-the-moment’ as the Coach works with the team over time.

### **7.1.4. Understand how to help a team choose to be a team**

*Agile makes teams more likely, but not inevitable. Groups need to choose to become a team and an Agile Coach helps them consciously choose to be so, or not.*

Purpose: To reveal the truth that not every “team” is really a team. The essential ingredients to be a team are offered in this LO, as well as ways for the Agile Coach to help a group decide whether they can and want to be a team, and, if so, put the necessary building blocks in place during the team start-up. If not, this LO offers ways for the Agile Coach to recognize and work with a group, which may not be as effective as a team, but can still be successful.

## **7.2. Theme: Teaching the Agile Basics & Mindset Shift**

### **7.2.1. Modes of teaching**

*Teaching the basics and mindsets of agile is an activity the Agile Coach performs again and again and is conducted both in and out of the classroom.*

Purpose: To offer techniques for teaching the basics and mindsets of the chosen agile framework(s) in both formal training and on-the-fly training scenarios. On-the-fly training is the minimum needed for effectiveness, such as might be possessed by an Agile Team Facilitator. More formalized training becomes important as one’s sphere of influence increases, as it does for an Agile Coach.

### **7.2.2. How to help team members experience the Agile mindset shifts**

*Teaching is not education; education is not learning.*

Purpose: To offer activities and techniques for creating experiences that allow team members to immerse themselves in what it’s like to work on an agile team and what it’s like to take on the needed mindset shifts that enhance an agile team’s success (i.e. self-organization, value-driven prioritization, collaboration, empiricism).

### **7.2.3. Be able to distinguish and articulate at least one Agile framework**

*Agile Coaches know one or more agile frameworks ‘stone-cold’ and can fully articulate at least one clearly, simply and quickly.*

Purpose: To help the learner become accomplished at articulating and teaching at least one agile framework, including its associated roles, common practices, values and principles.

## 7.3. Theme: Setting up the Team Environment

### 7.3.1. Theme: Helping Teams to Know Themselves

*To perform, team members need to know one another's backgrounds, talents, skills and have a sense of what they can count in one another.*

Purpose: To teach the learner how to conduct several different activities that help team members to discover one another as individual human beings, to include learning about one another's professional backgrounds, values and goals.

### 7.3.2. Theme: Helping Teams Create their Culture & Vision

*To perform, team members need to know who they are becoming as a team, specifically what culture they desire to create together and what their vision of being a team means to them.*

Purpose: To teach the learner how to conduct several different activities that help team members create their team culture and team vision.

### 7.3.3. Theme: Creating Team Agreements & Ground rules

*To perform, team members need a set of agreements that help them move toward their desired culture, vision and results.*

Purpose: To teach the learner how to conduct several different activities that help team members create their team agreements and ground rules so that these can serve as an anchor point the team can use as they work together and move toward their desired state, or not.

### 7.3.4. Theme: Setting up their work environment

*To perform, team members need a physical work environment that meets their needs and they need to create it themselves.*

Purpose: To expose the learner to the importance of creating a physical work environment that supports the way the team desires to work. This LO details which elements to pay attention to (ie. physical arrangement of tables, monitors, private space, public space, task board, use of/display of electronic tools) and underscores how to help the team make decisions regarding these and make them happen.

### 7.3.5. Theme: Accommodating the team's geographical relationship

*To perform, team members need to make conscious decisions about how to accommodate the realities of their current geographic situation.*

Purpose: To expose the learner to the importance of helping the team make decisions that help them accommodate their geographic reality, whether co-located, partially co-located/partially distributed, or fully distributed. If co-located, the coach can help the team leverage their ability to be in high-bandwidth, informal conversation with big visible charts and the like. If separated, the coach can help the team compensate for the lower-bandwidth

communication through tools, over-communication methods, and the like. Regardless, the team's agreements, culture, vision, etc. will be impacted by their current geographic reality and should be incorporated into the team's start-up.

#### **7.4. Application: Creating a Team Kickoff/Startup Agenda**

##### **7.4.1. Will allow an experience of creating a team kickoff or start-up agenda in a realistic agile setting.**

Purpose: To apply the above components of a team startup to the real world scenario of starting up a team.

## **8. Growing and Developing Teams ~6-10 hrs**

### **8.1. Theme: Characteristics of an Agile Team**

#### **8.1.1 Trusting**

*Trust is a key characteristic of a high performing team; the absence of trust can lead to relationship issues between team members and detract from the real work of the team.*

Purpose: To provide the learner with techniques and tools for building trust in an agile team and how to identify signs of mistrust. A trusting environment is one where team members can depend on one another to work together to accomplish the team's purpose, are open and honest about their own strengths and weaknesses, willing to contribute value to decisions, and collaborate without fear of bullying, manipulation, backstabbing, or silent compliance.

#### **8.1.2 Propelled by Shared Purpose**

*High-performing team members are committed to the team's purpose and goals; they clearly understand their role on the team and believe that they can make a valuable contribution to the team.*

Purpose: To enable the learner to identify signs of commitment in a team, learn techniques for developing a common purpose, roles and responsibilities, and how these things can help individuals develop a sense of team identity where they place team goals before personal goals and agendas.

#### **8.1.3 Shared Leadership**

*Empowerment is the ability of the team members to make decisions in a disciplined manner as a problem arises. As a team matures, so will their ability to gather the appropriate information, include the right people and make decisions in a timely manner.*

Purpose: To introduce the concept of empowerment and provide the learner with tools to help the team develop their ability to make collaborative decisions.

#### **8.1.4 Continuously seeking to improve**

*Agile teams seek renewal and continuous improvement – constantly looking for ways to make minor adjustments in their work and velocity to achieve these moments more frequently.*

Purpose: To bring awareness to the journey of high performance and the importance of continuous improvement for an agile team.

#### **8.1.5 Self-Organizing**

*Self-organizing teams negotiate their deadlines, allow roles to emerge as the team works together, and define their own norms.*

Purpose: To understand the key beliefs to becoming a self-organizing agile team and to provide the learner with techniques and/or models to facilitate the team developing in this way.

#### **8.1.6 Complex adaptive system**

*Agile teams are complex adaptive systems and, as such, can be worked with at the systems level.*

Purpose: To understand the nature and characteristics of complex systems, and to have a model and ways for working with an agile team as a whole system rather than as the individuals that comprise the system.

### **8.2. Theme: Coaching the Journey toward High Performance**

#### **8.2.1 Defining and identifying high performance**

*High performance is a journey, not a destination. Many teams will strive for high performance and never reach it, others will experience it for a moment in time and it will be gone. High performance is a journey, not a destination. Many teams will strive for high performance and never reach it, others will experience it for a moment in time and it will be gone and then recaptured.*

Purpose: To provide the learner with the ability to identify characteristics of a high performing team and to help the team assess their performance and identify areas for improvement. An agile team is a high performing team when they are aligned toward a common goal, roles and responsibilities are clearly understood by all, they have a high level of collaboration and trust, they demonstrate effective ways of resolving conflict, and there is a strong sense of individual and shared accountability to achieve the teams goals.

#### **8.2.1. Team vs. Group**

*Not every group needs to become a team or stay a team. The Coach works with the team to identify when a team is needed.*

Purpose: To understand the differences between a group and a high-performing team and help the learner identify when each is appropriate.

### **8.2.2 Team development is a journey, not a destination**

*Teams will move in and out of different levels of team functioning on their journey to being a high performing team.*

Purpose: To provide the learner with a context for understanding that teams go through cycles--moving from highly collaborative and productive to less productive and less collaborative--in addition to their developmental stages (referenced in 5.1.1). This is a natural process and needs to be reflected back to the team, not seen as a failure.

### **8.2.3 Assessing the team as a healthy system**

*Teams may move into a pattern of unhealthy functioning, toxic communications, and/or severe underachievement.*

Purpose: To provide the learner with a one or more models for assessing healthy team functioning, especially the ability to identify clearly dysfunctional teams. It also provides suggestions for dealing with common dysfunctional patterns.

### **8.2.4 Strategies for dealing with different types of teams**

*Different types of teams will require different strategies and techniques by the coach.*

Purpose: To understand the different types of teams (e.g. Co-located /Virtual; Ongoing / Temporary; Single Organization / Cross-Organization; Same Culture / Culturally Diverse) and provide the learner with ways to tailor their interactions with the team based on the type of team they are coaching.

### **8.2.5 The coach's role in a self-organizing team**

*Agile Coaches operate on the belief that the team has the answers to solve their problems and act in the role of facilitator, mentor and teacher to guide the team in discovering their solution.*

Purpose: To provide the learner with techniques for fostering a self-organizing team including; facilitative leadership, defining team norms, facilitating the appropriate type of decision making, and allowing leadership and roles to emerge. This requires the skill set to change from teaching to facilitating to mentoring to coaching at varying times.

## **8.3. Theme: Handling Organizational Impediments**

### **8.3.1 Thinking of the organization as a complex system.**

*Organizations can be seen as complex adaptive systems. Such models create resourcefulness in understanding organizational behavior.*

Purpose: To become familiar with one or more models of systems thinking to help frame the behavior that occurs in organizations as having a systemic basis, rather than being merely individually motivated or controlled.

Applications to Agile adoption within and around a team should be covered.

### **8.3.2. Identifying and Capturing Impediments**

*The decision to adopt agile at a team or organizational level will introduce varying types of change into the organization.*

Purpose: To become familiar with common organizational impediments and to help the learner be able to help teams recognize and capture the impediments affecting them. Agile practices do not necessarily create new problems but they have a way of surfacing dysfunctions that already exist within an organization.

### **8.3.3. Leadership Engagement**

*Organizational impediments limit team productivity and quality. Some impediments can be resolved by the team, others may need to be solved at higher levels in the organization.*

Purpose: To provide the learner with the ability to know when and how to engage leadership in solving organizational impediments.

## **8.4. Theme: Handling Dysfunction within the Team**

### **8.4.1 Identifying and Managing ‘Group Think’**

*Group think is when groups make decisions without critical evaluation of alternative ideas or viewpoints. Group members move toward decisions prematurely in order to minimize conflict due to multiple factors such as; group pressure, lack of trust, fatigue, apathy, lack of involvement, etc.*

Purpose: To help learners identify when group think happens and how to prevent, or manage it when already present.

### **8.4.2. Identifying and surfacing conflict**

*Conflict is a natural part of a team’s development and learning process and is essential to their creativity and quality of work. Fear of interpersonal conflict can be an impediment to building a high performing team.*

Purpose: To understand the importance of conflict in a team, become familiar with a model for identifying levels of conflict in a group and provide the learner with the ability to surface conflict in a positive manner to improve team’s performance and best possible solutions to challenges. When conflict navigation skills exist, team members feel more confident in their abilities to address conflict and hold one another accountable for their behavior and performance.

## **8.5. Theme: Creating adaptive teams**

### **8.5.1 Adapting inwards vs pushing outwards**

*Agile coaches help the team adapt internally and reach the highest level of agility they can within the constraints that are surrounding the team. At the same time the coach pushes outward beyond the team to try and remove some of these impediments to allow the team to reach a higher level of agility in the future.*

Purpose: To provide the learner with the ability to identify and remove organizational impediments, beyond the scope or direct control of the team.

### **8.5.2 Agile Coaches vs. Enterprise Coaches**

*Agile Coaches have purview over multiple agile teams. Their job is to identify organizational issues outside the team that may be impacting performance or hindering the adoption of agile practices. The Enterprise Coach works at the enterprise level to manage the organizational change required to realize the business value of agile.*

Purpose: To provide the learner with an understanding of the different roles of agile coaches within the organization.

### **8.5.3 Change Models**

*Agile is not just about a new set of practices for software development, it is ultimately about a mindset and culture change at the individual, team and organization level.*

Purpose: To introduce the learner to one or more models for organizational change and to understand the system change required at an enterprise level for an organization to move towards agile including adaptations to organizational structure; physical office layout, hiring practices, career paths, training and development, compensation, rewards and recognition, leadership, etc.

## **8.6. Application: Facilitate a conflict in a team**

*Purpose: To simulate a conflict among members and practice techniques for observing the behavior, deciding if and how to intervene, surfacing the conflict, either by doing it and/or by talking through the thought process of how you would do it.*