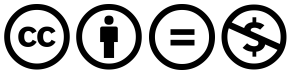
Agile Team Facilitation Learning Outcomes

Version 2.0



LICENSING INFORMATION

The work in this document was facilitated by the International Consortium for Agile (ICAgile) and done by the contribution of various Agile Experts and Practitioners. These Learning Outcomes are intended to help the growing Agile community worldwide.

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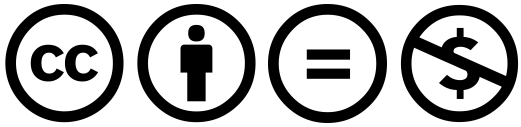

SPECIAL THANKS

ICAgile would like to thank the contributors to the Agile Team Facilitation Learning Outcomes:

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HOW TO READ THIS DOCUMENT

This document outlines the Learning Outcomes that must be addressed by accredited training organizations intending to offer ICAgile's Agile Team Facilitation certification.

Each LO follows a particular pattern, described below.

0.0.0. Learning Outcome Name

Additional Context, describing why this Learning Outcome is important or what it is intended to impart.

The Learning Outcome purpose, further describing what is expected to be imparted on the learner (e.g. a key point, framework, model, approach, technique, or skill).

LEARNING OUTCOMES

1. DEVELOPMENT IN THE AGILE COACHING DISCIPLINE

1.1. DEVELOPMENT PATH FOR AGILE COACHING

1.1.1. Defining an Agile Coaching Development Path

Effective Agile Coaching requires that people take their development one step at a time, obtaining competence at each step before moving on.

Outline the steps for someone developing themselves in the discipline of Agile Coaching. Someone operating at the Agile Team Facilitation step is knowledgeable in Agile practices, and is developing the fundamental skills in facilitation, as well as the self-leadership needed to coach a self-organizing team. At this step, it is common to work with one or a few Agile teams. At the Agile Coaching step, one has achieved an expert level in Agile practices and one or more knowledge domains (e.g., technical, business, transformation) while having developed functional professional coaching, mentoring and teaching skill and a significant level of skill in facilitation. Someone at this step commonly works at the scope of one or a few teams, and as they develop more demonstrable competence, their scope may expand to the multi-team or program level (more than 100 people). To operate at each step, there is an increasing level of skill, gravitas and scope of influence expected.

1.1.2. Assessing One's Ability to Serve the Team

Agile Coaches at all developmental levels respect the boundaries of their abilities and call for assistance when needed.

Set the expectation that Agile Coaching is a multi-person 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. They also call on their peers at the same developmental level when they need a sounding board or partner. These are opportunities for the team to receive the level of skill needed and for the Agile Coach to learn from pairing with mentors and peers.

1.2. THE AGILE TEAM FACILITATION MINDSET

1.2.1. Definition of Facilitation

Facilitation is helping a group identify common objectives and offering group processes to achieve those outcomes while maintaining neutrality.

Level set on the definition of a facilitation as a neutral process owner for group work and decision making.

1.2.2. Definition of Agile Team Facilitation

Professionals operating at the Agile Team Facilitation step keep an Agile team running and growing.

Define the purpose, mindset and functions of a professional operating at the Agile Team Facilitation level of skill. At the most basic, the purview of someone at this step is to facilitate Agile practices and daily interactions to foster collaboration and healthy self-organization. Professionals at the Agile Team Facilitation step behave in ways consistent with Agile and are Agile role models.

1.2.3. The Facilitation Mindset

Effective facilitators consciously embody key beliefs and principles that inform and underlie their actions as they engage groups in processes to achieve their desired outcomes.

Introduce and help the learner embody the beliefs and principles of effective facilitators such as self-awareness, self-management, neutrality, group awareness, group process, and conveying openness and enthusiasm while maintaining an allegiance to the 'power of teams' over individual contributors.

2. COACH AS FACILITATOR

2.1. FOUNDATIONAL FACILITATION SKILLS

2.1.1. Defining the Purpose and Outcomes

Effective meetings have clear purpose and outcomes. These are best defined by the person with the most at stake from the outcome.

Provide the learner with planning tools and techniques to clearly identify the purpose and intended outcomes of the meeting in collaboration with the meeting sponsor(s).

2.1.2. Design the Flow

Facilitators use the desired outcomes to design the meeting flow, a series of activities that help the group achieve their desired outcomes.

Enable the learner to design a facilitator guide, with intentional group process to achieve the desired purpose and outcomes. Consideration is given to the overall arc of the session, expanding and contracting ideas, group energy levels, selecting the right participants, scoping the session to the time allowed and identifying potential issues.

2.2. CONDUCTING A FACILITATED SESSION

2.2.1. Maintain Neutrality

Neutrality is the facilitator's ability to focus on the group process and suspend judgments on the content of the meeting.

Teach the importance of neutrality and how its absence can erode trust, decrease full participation and result in a less effective decision. Provide the learner with techniques and methods for maintaining neutrality.

2.2.2. Create a Collaborative Space

Collaborative spaces create connections, foster trust, allow for silence and welcome differing points of view.

Provide the learner with examples of what creates versus what detracts from collaborative space (i.e., room configuration, working agreements) and provide them with techniques that foster collaborative spaces.

2.2.3. Facilitating Full Participation

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

Expose the learner to different techniques to garner full participation without promoting chaos (e.g., brainstorming, silent working, prioritization, multi-voting).

2.2.4. Using the Meeting Organizing Tools

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

Provide the learner a suite 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.

2.2.5. Facilitating Collaborative Conversations

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

Give learners techniques to facilitate better, more meaningful collaborative conversations by maintaining awareness of one's own style, gaining understanding and acceptance of other styles, seeing and working with conversational patterns and increasing the capacity to give and receive feedback.

2.2.6. Clarify team decision-making authority

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

Emphasize the importance of being intentional when clarifying the scope of decision-making authority of the team based on what decision is being asked of them.

2.3. FACILITATING COLLABORATIVE MEETINGS

2.3.1. Facilitating Agile Framework Meetings

The connection between the purpose of an Agile ceremony and the underlying principles/values it expresses must be made explicit so that Agile ceremonies do not become empty rituals.

Convey the purpose and the underlying principles/values that are satisfied in each of the meetings in the Agile framework(s) pertinent to your course. This can be delivered as written information and does not need to be explicitly covered real-time in the classroom.

2.3.2. Facilitating 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.

Familiarize the learner with 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. 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, fear of repercussions, non-collaborative).

2.3.3. Facilitating 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.

Relay techniques to keep the stand-up purposeful. This LO emphasizes facilitation that safeguards the stand-up as a venue for daily commitment, raising impediments, and keeping momentum while avoiding common pitfalls (e.g., going longer, reporting in, turning into a status meeting, veering into the purpose of another meeting, disengaged members, becomes boring).

2.3.4. Facilitating Selected Agile Meetings

The most vital Agile meetings in the Agile framework(s) you teach will be brought to life through facilitation methods that increase collaboration and ensure that Agile meetings remain real work.

This LO gives flexibility as to which Agile meetings get covered at a deeper level during the class. Retrospective and Stand-Up, plus 3 or more other Agile meetings from the framework(s) of your choosing, must be covered in a way that illustrates facilitation methods for amping up success and avoiding pitfalls.

2.4. SKILLFULLY FACILITATING THE AGILE PRACTICES

2.4.1. Design and Facilitate an Agile Meeting

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

Provide an opportunity to practice some of the facilitation skills and mindsets they have just learned in the context of an actual meeting that occurs within an Agile framework.

2.4.2. Adjusting Facilitation Given Team Maturity

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

Provide exposure to and/or the opportunity to practice facilitating under different conditions of team maturity. A planning meeting for a team new to Agile will look and flow differently than for a team that has been practicing this way for years. Thus, the facilitation style and emphasis will be different: the teams need different things from the facilitation. Experientially deliver this contrast, using any Agile event as an example.