

Getting Started with Agile: an Emergent Organizational Change Approach

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Michael Hamman
ecosystemae

Intention of Presentation

To provide some models and perspectives to help leaders and managers imagine a way of bringing about effective and adaptive transition to organizational and software agility.

Agenda

1. Some Standard Change Approaches
2. A Framework for Adaptive Change
3. Adaptive Agile Transformation
4. Sample Agile Transition Phases

Assumptions & Biases

- ❑ Large companies (1,000+ people).
- ❑ Bias toward an 'O' type theory of change.
- ❑ But also driven by 'E' imperative
- ❑ Motivated by large systemic change as opposed to relatively minor project level 'adjustments.'

What we're growing is adaptive capability.

*The activity we call building creates the physical order of the world, constantly, unendingly, day after day.... **Our world is dominated by the order we create.***

-- Christopher Alexander

1. Three Standard Change Approaches

Three approaches to change...

1. Top-down Change

Change is driven from the top down

Change is initiated in times of crises--it is *dramatic*.

Incites revolution, which provides impetus.

Examples: recapitalization, reorganization, repositioning strategy, reforming organizational culture; some Agile adoptions.

Can be misguided, since it is driven by a small (top management) population.

Will likely engender resistance, and hence ineffectual execution.

Highly disruptive, with a long road to recovery.

Three approaches to change...

2. Bottom-up Change

Change is driven from the bottom-up; it is 'grassroots'.

Informal, improvisatory, unmanaged.

Messy, dynamic, creative, experimental, adaptive.

Examples: skunk works, some Agile adoptions.

Lack of coordination can result in groups working at cross purposes.

Can activate unhelpful political fighting (e.g. us-versus-them).

Can result in narrowed competencies because of being overly focused on own interests.

Three approaches to change...

3. Planned Change

Change is driven laterally, usually by internal (or external) consultants.

Highly planned, focused, and methodical.

Change templates often imported into the organization.

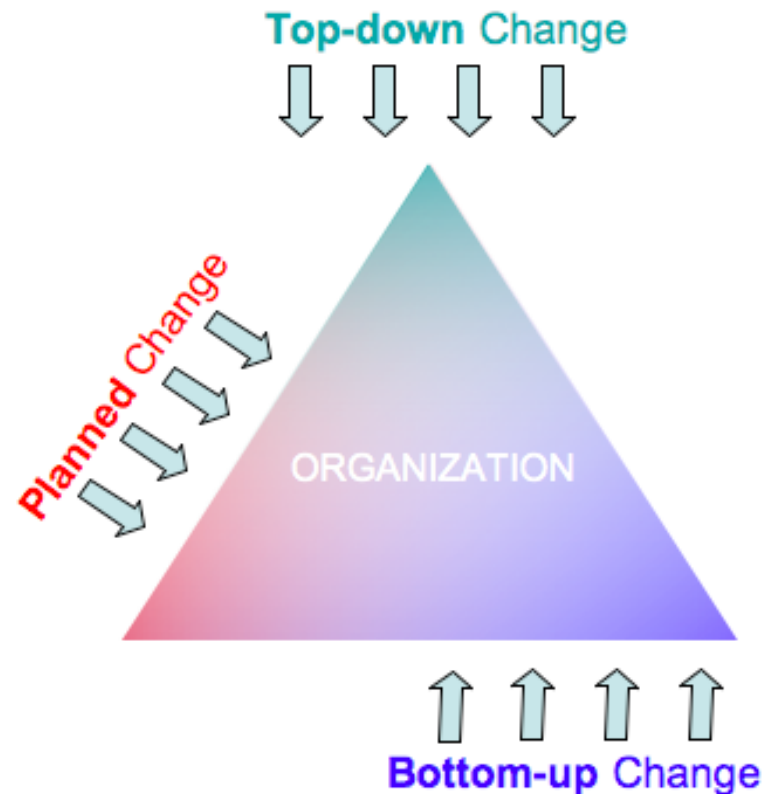
Examples: quality improvement, reengineering, some Agile adoptions.

Can be overly formalized, and stifling of initiative.

Big up-front planning may yield changes in practice, with little transformative effect accrued to the organization.

The *importation* of methodology is inorganic, and hence may not be the right fit.

What we want is a way of thinking about adaptive agile transition that can integrate these three change approaches into a dynamic ‘rhythm of change’.



2. A Framework for Adaptive Change

Consider...

Adaptive Change in organizations arises from the interweaving of four qualities.

- It is **Piecemeal**.
- It is **Emergent**.
- It is **Holistic**.
- It is **Native**.

Change that is Piecemeal.



Piecemeal

Rather than sporadic and episodic, we imagine change as piecemeal, ongoing.

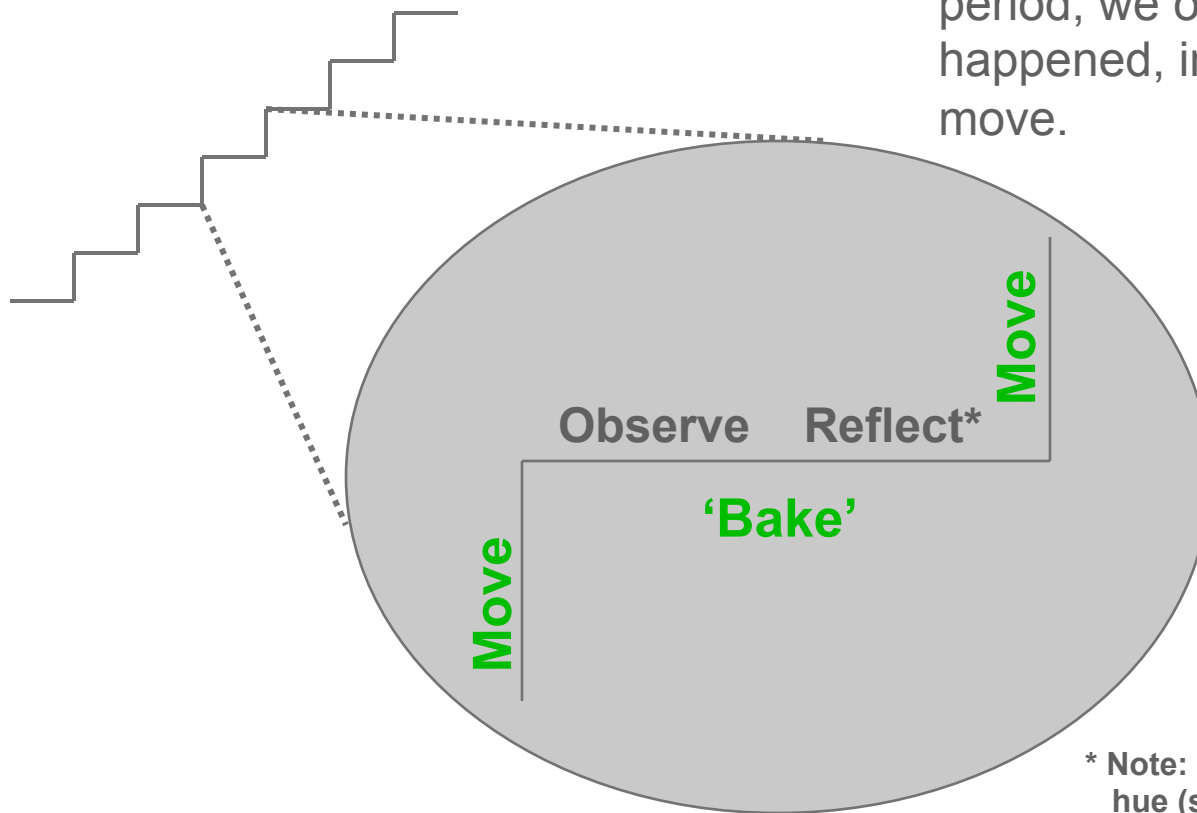
Small increments arise from a *vision* of what is wanted in the organization.

Requires feedback and reflection--and hence visibility and transparency--in order to correct small errors and make small improvements as we go.

Rather than large, disruptive Change (with a capital C), we start with something small, and grow, in small increments, from there.

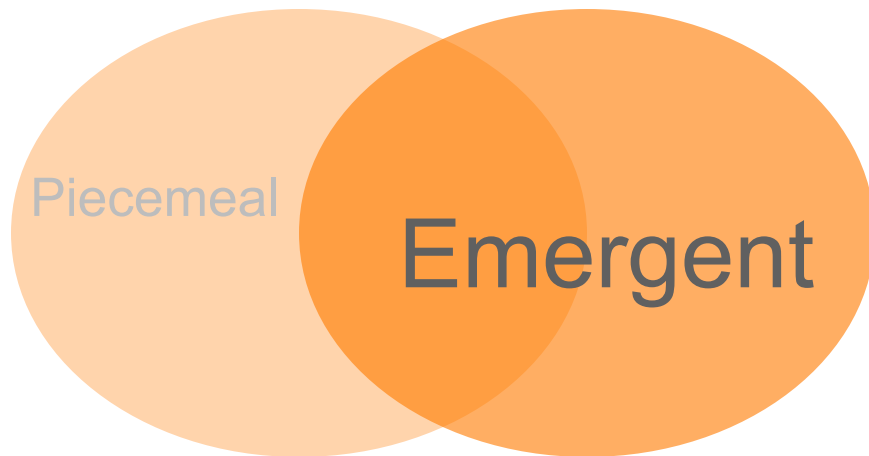
Change that is Piecemeal.

A staircase sequence of small change *moves*, each small move followed by a 'baking-in' period. During this 'baking-in' period, we observe and reflect on what happened, in preparing for the next move.



* Note: Reflection must have a *Holistic* hue (see below).

Change That is Emergent.



Piecemeal growth implies a change process that is emergent, rather than planned up-front.

While the vision for where we're going may be known *a priori*, the path itself **emerges** as we traverse it.

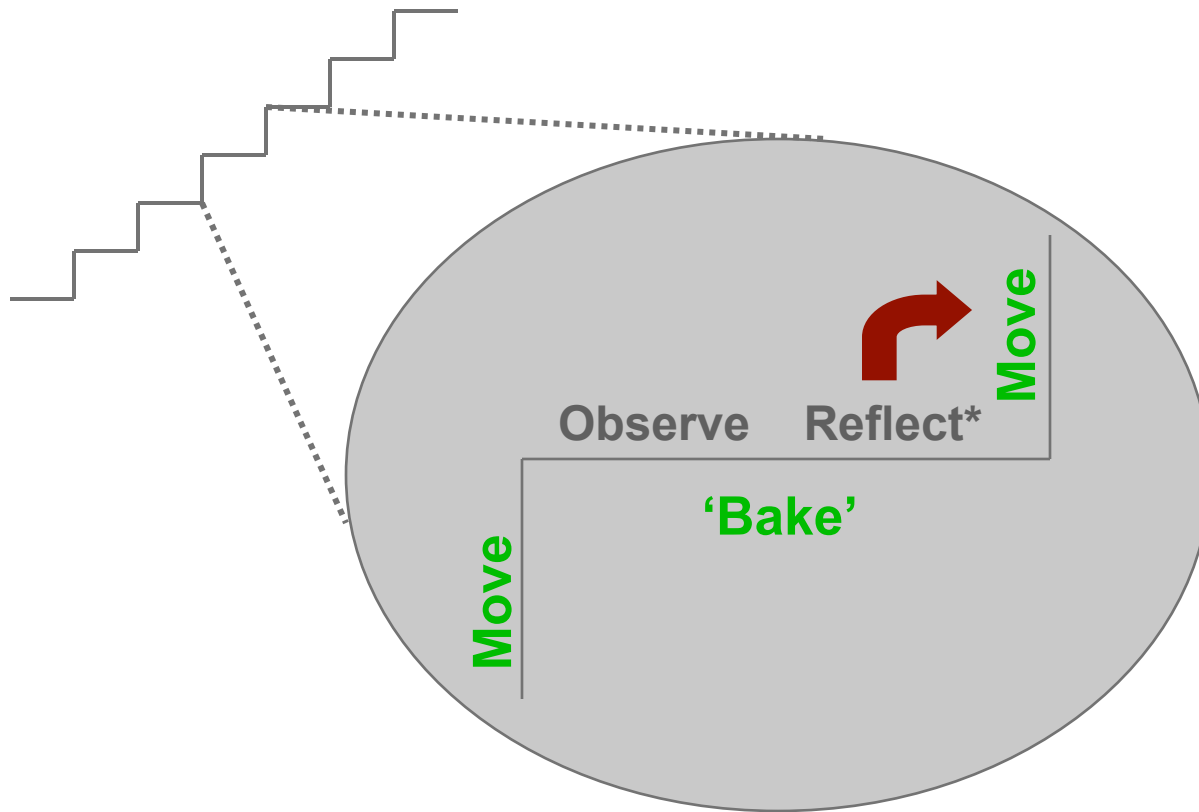
This allows us to learn as we go.

Again, this requires transparency and visibility. Without this, there can be no Emergence.

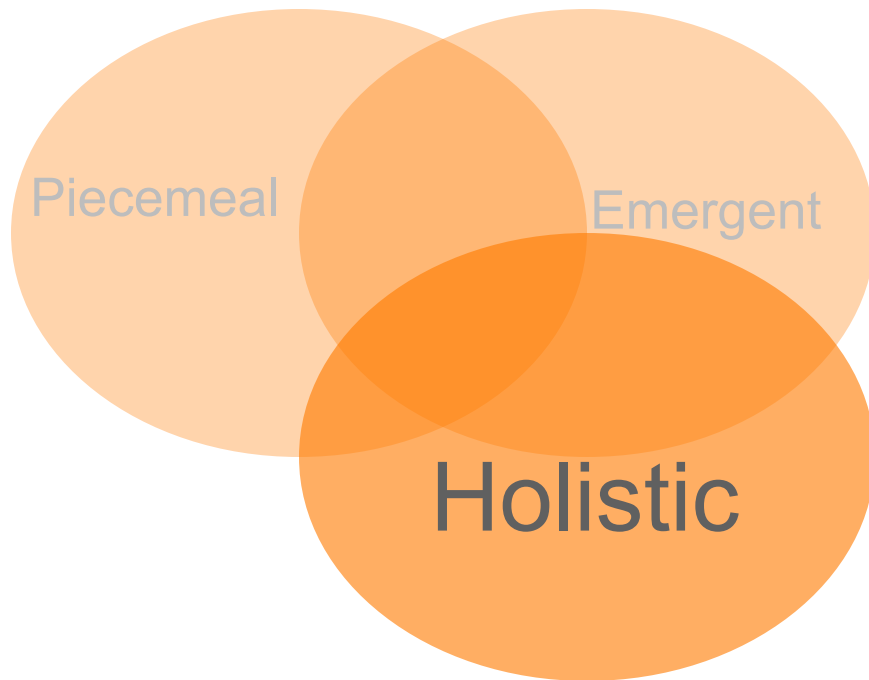
Composition (planned change) converges with execution (actions taken, discoveries made).

Change that is Emergent.

Each reflection gives rise to a hypothesized next Move.



Change That Is Holistic.



Every system (team, unit) is embedded in a larger whole.

It is all too common to optimize locally (e.g. our unit, our team, our functional group) at the expense of the whole.

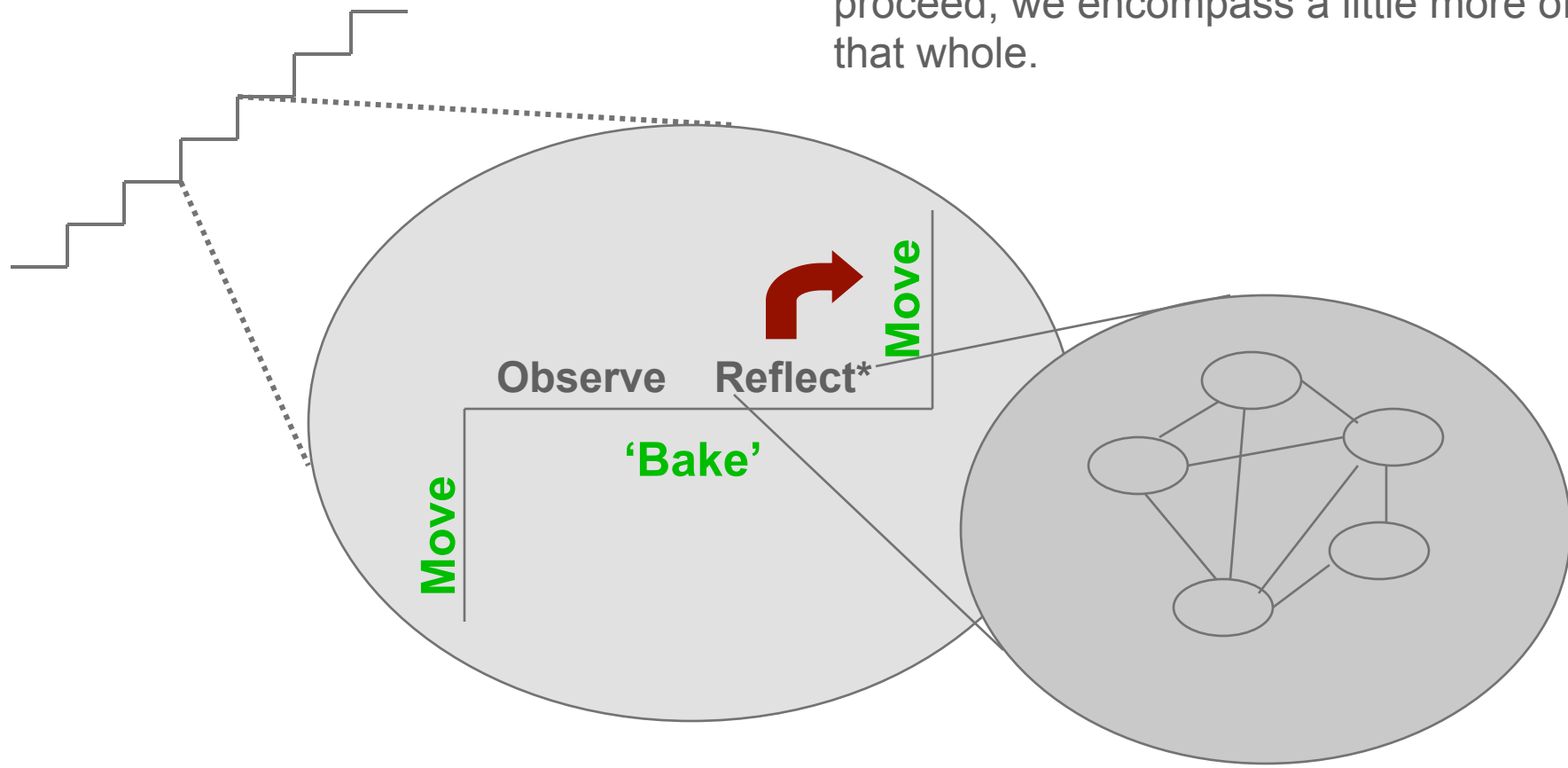
Change process and activities involve all management layers.

Working together to see the whole, even as it also is emerging.

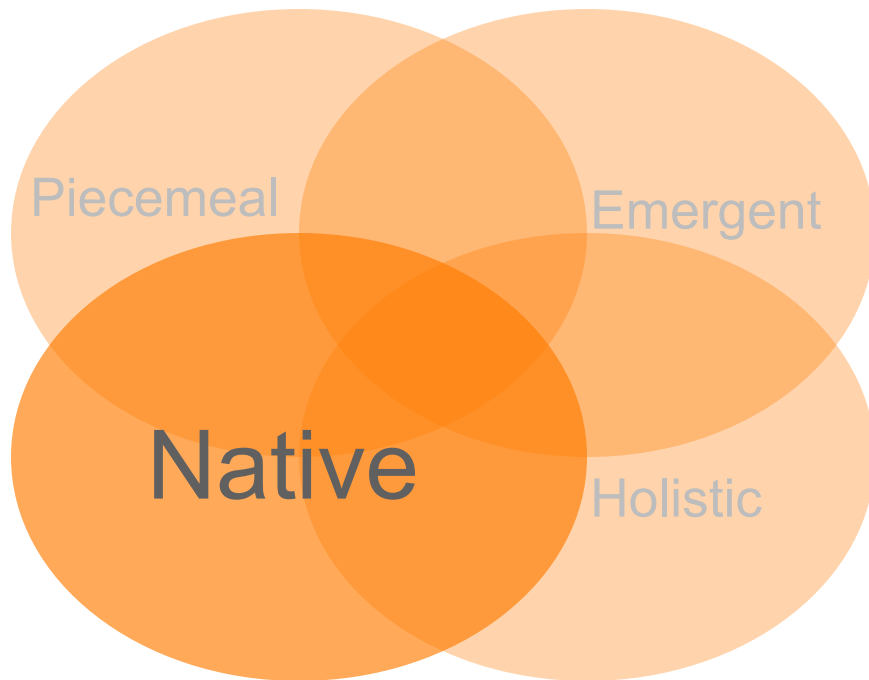
Incremental and emergent change processes must be ever-mindful of the larger wholes that are affected.

Change that is Holistic.

Each reflection takes in the greater whole of the organization. Initially, we start with a smaller part of this whole. Then, as we proceed, we encompass a little more of that whole.



Change that is Native.



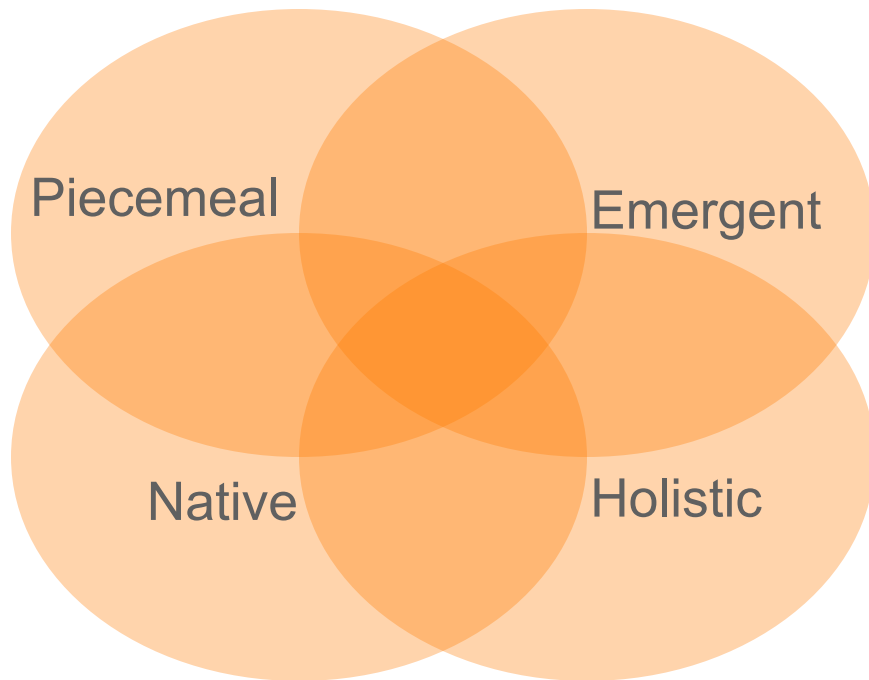
Incremental, Emergent, and Holistic growth must arise from what is already there.

Just as we are asking people to become more adaptive to new practices and processes, so must those practices and processes be adaptive to how people best work.

A notion of change that discovers and amplifies current strengths, styles and capabilities.

New practices and processes reflect the socio-cultural flavors and textures that are already there.

A Synergy



Change strategy (planning) and execution emerge together.

New practices are adopted piece-meal, out of native 'best practices.'

Even so, vigilant attention is given to the whole.

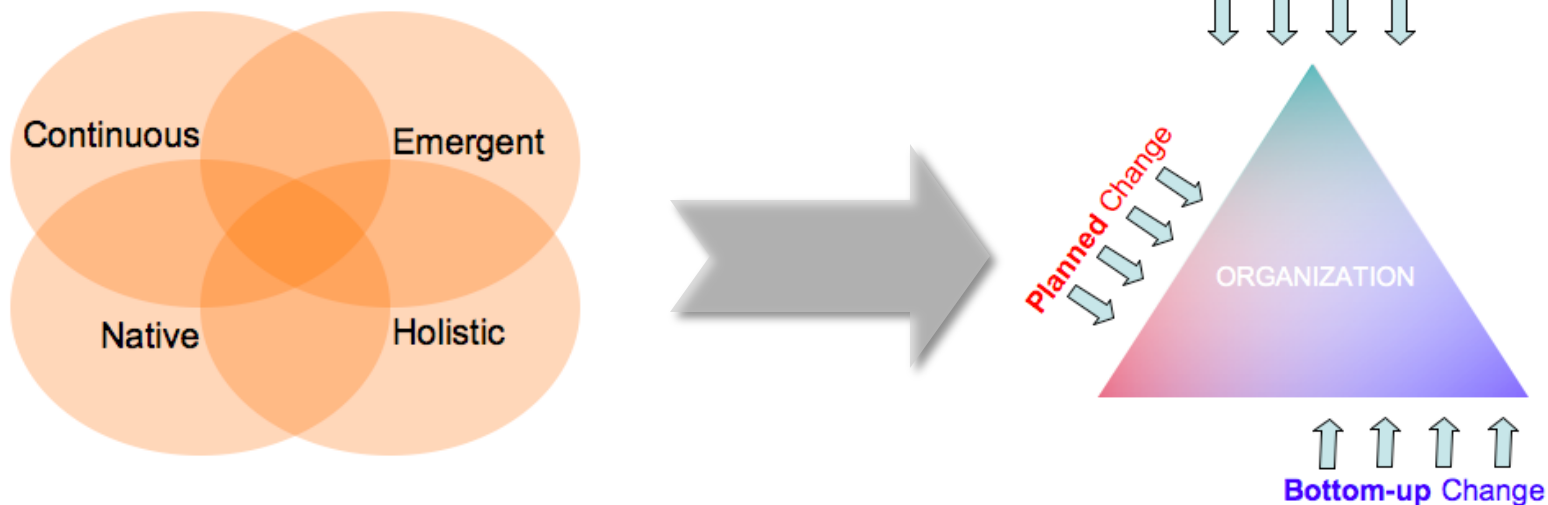
People at all levels own and participate actively in the change process.

We correct small errors as we go along.

Requires transparency and visibility.

Facilitates a high degree of organizational adaptability.

Such a process allows for a synergetic balance of top-down, bottom-up, and planned change approaches.



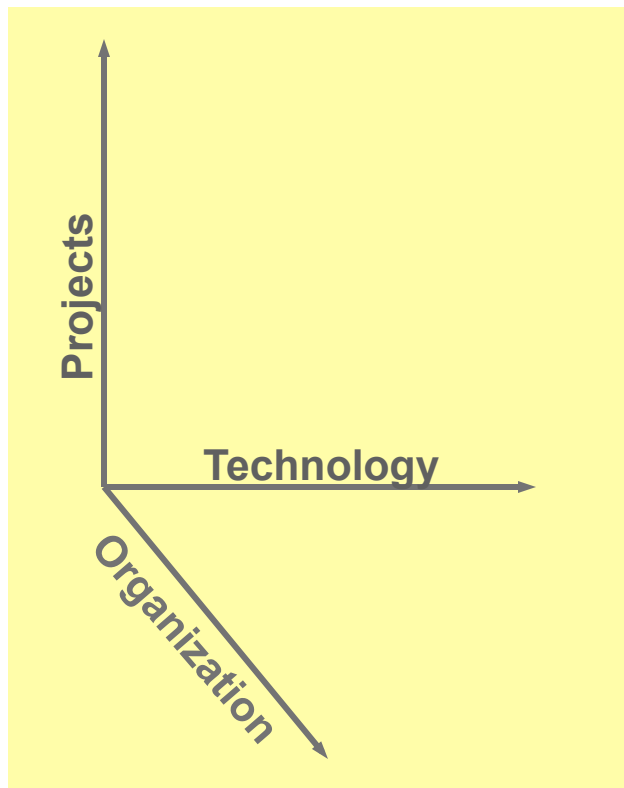
How much of which (top-down, bottom-up, planned) will be a function of several organizational and cultural factors.

- Planned Change -- Allows plan to emerge. We still begin with a plan but, as is the case with Agile projects, we know we don't have to plan 'everything.'
- Top-Down Change -- Allows executive leaders to adapt and modulate their involvement, from being the Visionary, to being the Evangelist, to occasionally being the 'Autocrat.'*
- Bottom-Up Change -- Provides emergent organizational structures and systems to support necessary grass-roots engagement and leadership.

* See T. B. Lawrence, et al., "The underlying structure of continuous change," *Sloan Management Review*, 47(4).

3. An Adaptive Agile Transition Pattern

Agile Transition Scaffolding



Amplitude of Practice

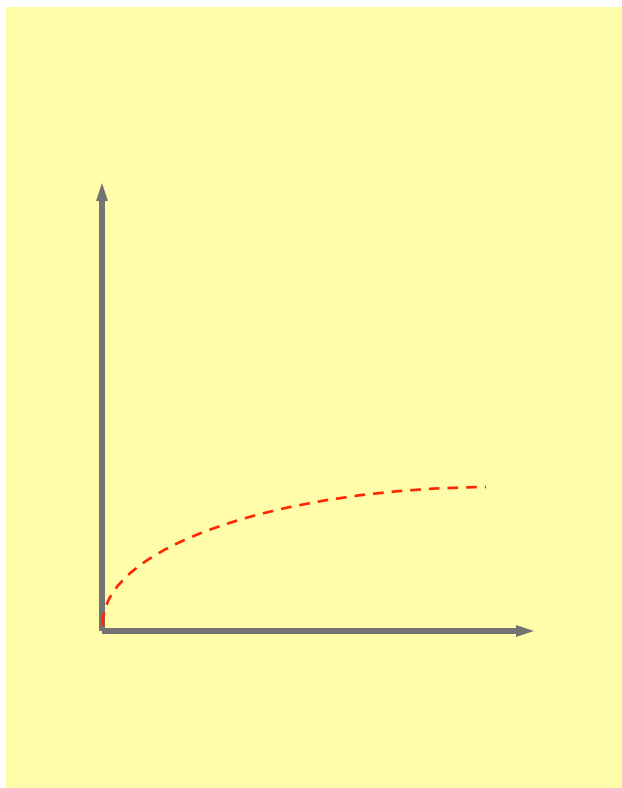
Adaptive growth unfolds across three dimensions.

Incremental growth increases **practice amplitude** in at least one dimension resulting in overall movement across all.

Don't focus on all three all the time--it's a *rhythm*.

Nevertheless: Exclusive over-emphasis in one dimension for too long results in accumulation of dysfunction in other dimensions.

Focusing On Project Dimension Only



Limits to Growth

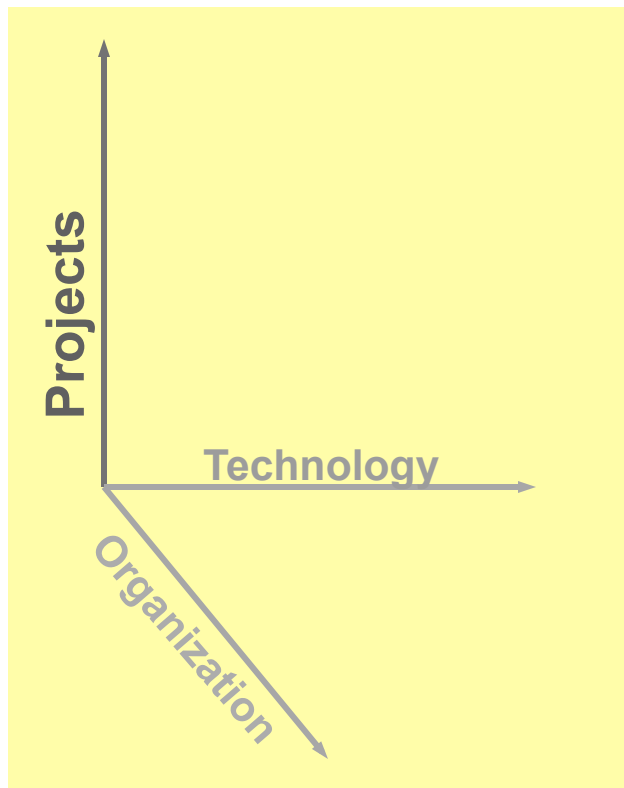
... can result in the fabled
'limits to growth' behavior.

Things start out great. But, then they
falter. Inscrutable results and behaviors
appear.

We respond by redoubling our effort.
This usually makes things worse.
Shame and embarrassment follow.

But, usually the problem is in some other
dimension, which we've been ignoring.

Project Dimension



Amplitude of Practice

Where most of the Agile literature resides.

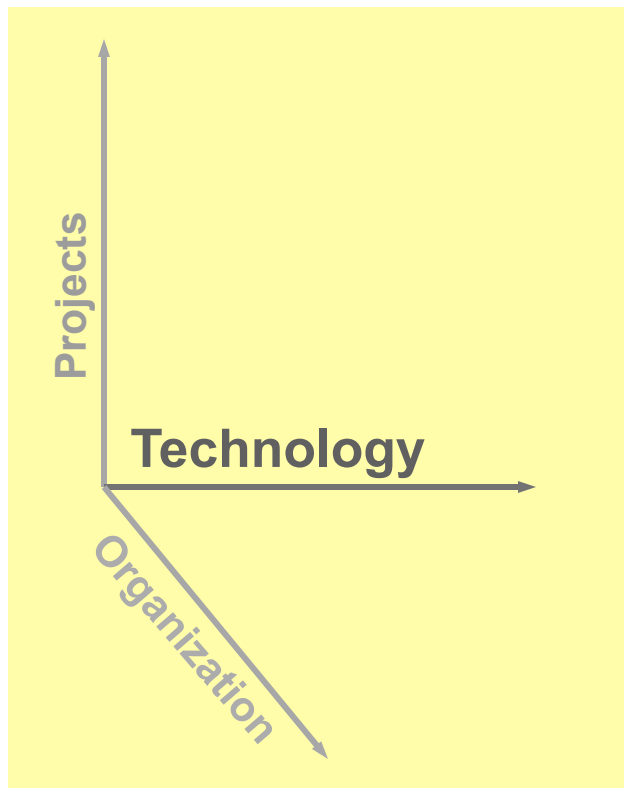
Addresses software development, project management, requirements, project teams, self-organizing teams, customer-team collaboration.

Also includes inter-project issues

Sample Resources:

- XP, Scrum, Crystal, FDD, etc.
- Schwaber, *The Enterprise and Scrum*.

Technology Dimension



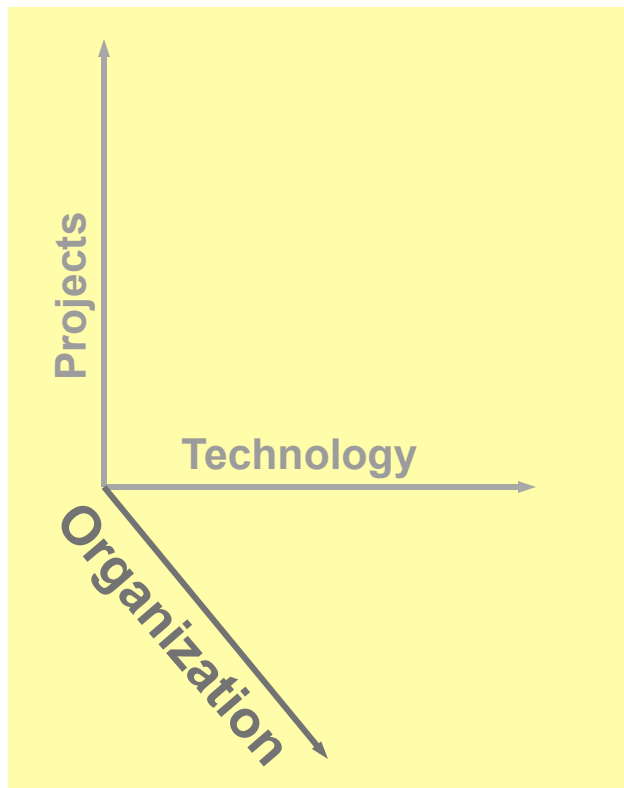
Amplitude of Practice

Includes project technology, programming languages, tools, company platforms and infrastructures, architectures.

Sample Resources:

- Dean Leffingwell, *Scaling Software Agility*.
- Coplien & Harrison, *Organizational Patterns of Agile SW Development*.

Organization Dimension



Amplitude of Practice

Organizational culture, processes, systems, and practices.

Includes individuals, teams, and entire organization.

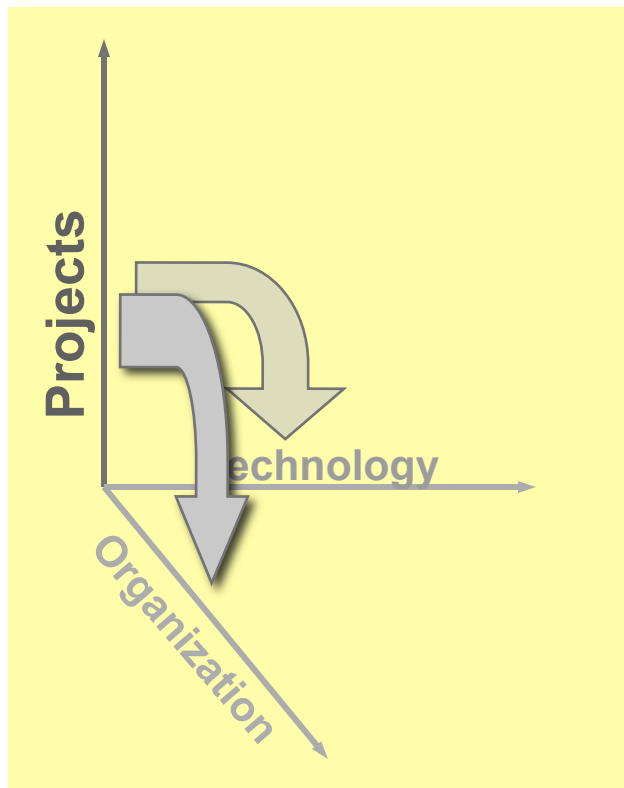
Leadership and human capability.
Organizational processes, systems, and structures.

The growing network of stakeholders, managers, and leaders involved in the adoption.

Sample Resources:

- Coplien & Harrison, *Organizational Patterns of Agile SW Development*.
- Organization Development literature.

Projects are Engines for Adaptive Growth.

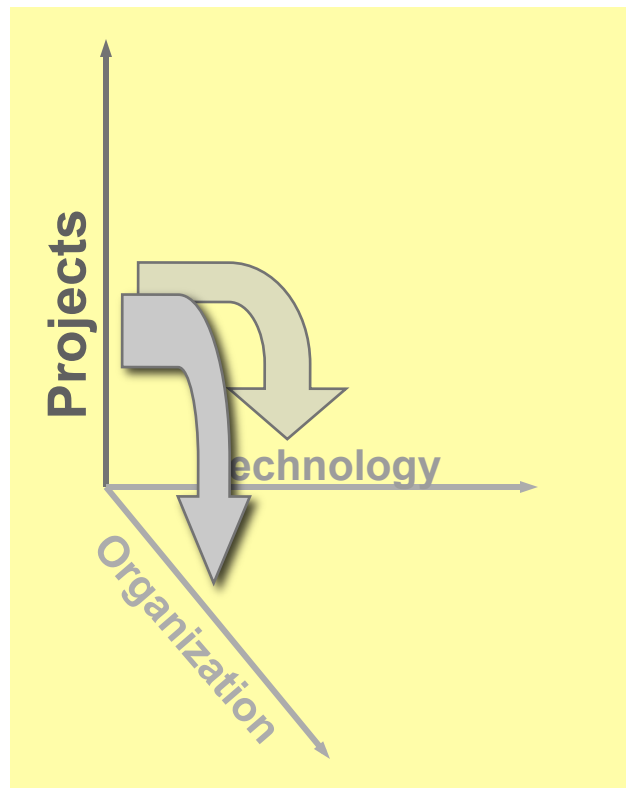


Projects are a context for organizational learning and growth.

The business drivers which they serve become catalysts for organizational improvement.

Correctly designed, projects generate *breakdowns*. They reveal aspects of Technology and Organization that hamper organizational growth and development.

Projects are Engines for Adaptive Growth.



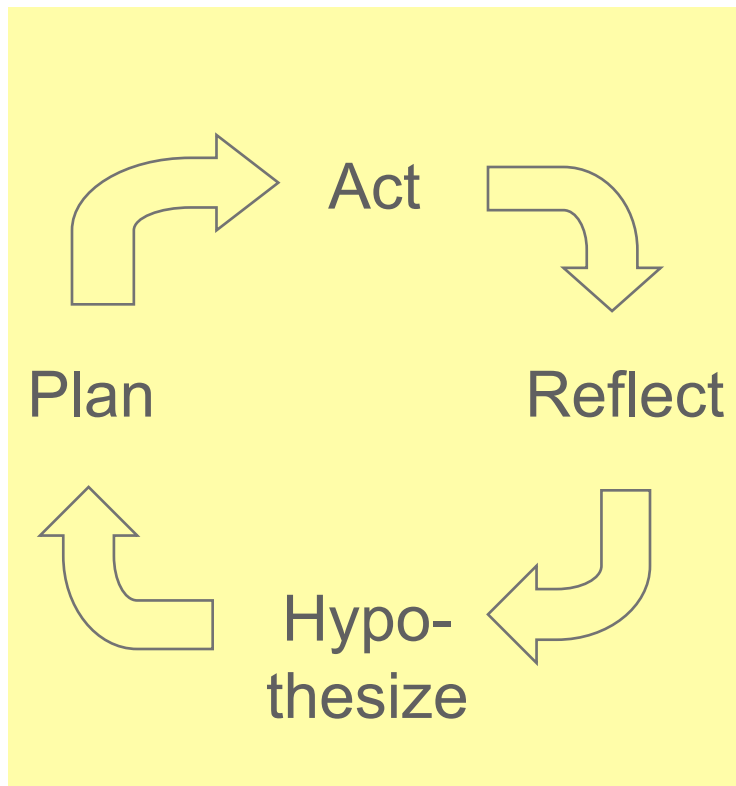
Such an understanding of projects requires that we think of them differently:

1. Commitment to continuous improvement.
2. An attitude of learning.
3. Sufficient room for error and rapid error correction.

Projects help facilitate growth in the amplitude of practices.

In his book, *Experimentation Matters*, S. Thomke called projects 'experiments for learning', citing Thomas Edison, among others.

Organizational Growth is Cyclic

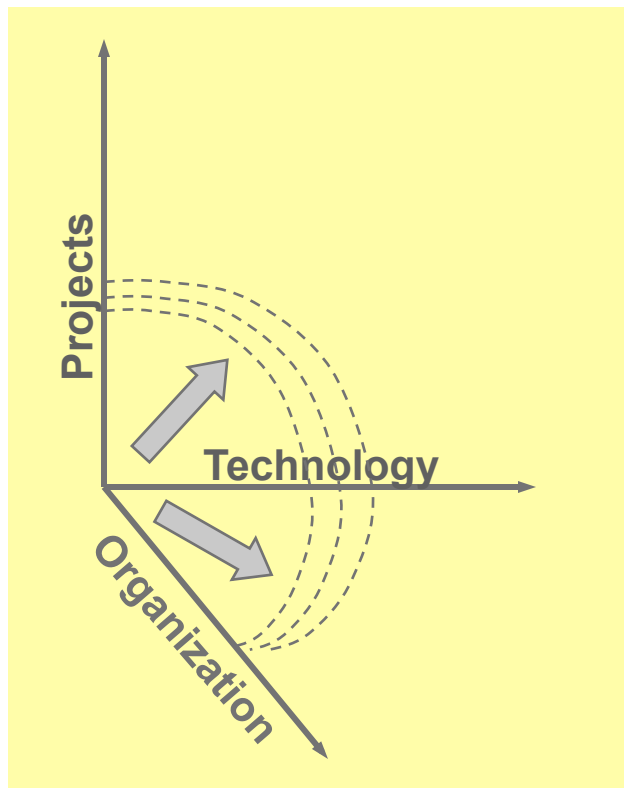


Cyclic Expansion

Action, reflection, and planning go together.

The process is cyclic. It is based on a well-known organization development practice called 'Action Research.'

Expand Phase



Amplitude of Practice

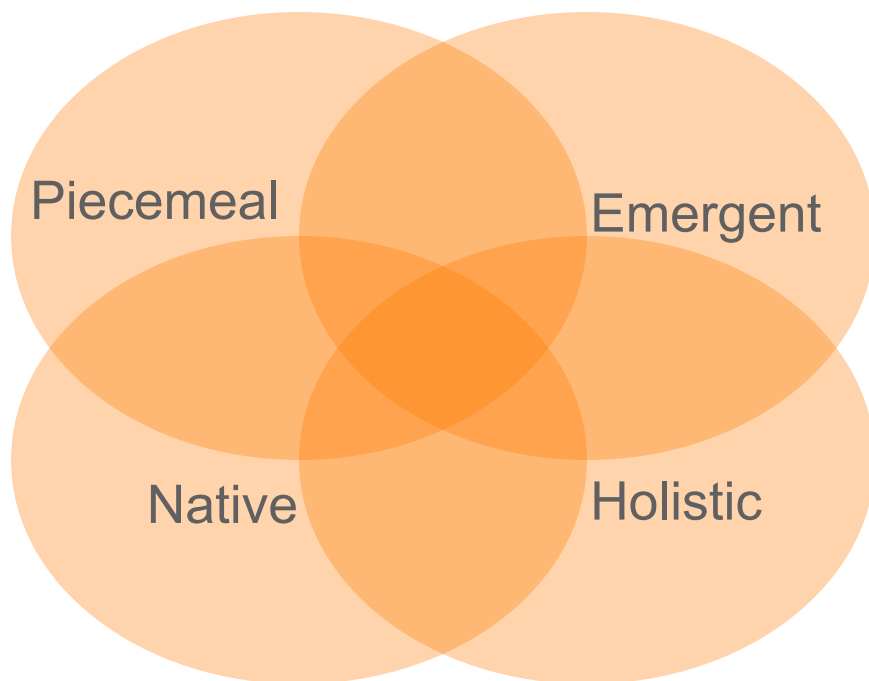
The process brings increasing amplitude & sophistication across the three dimensions.

Processes, methodologies, and practices *emerge* and *evolve* from simpler to more complex forms.

E.g. Software practices which can eventually have great sophistication and native particularity (Cockburn, 'methodology growing').

This emergent process follows along the grain of the current organization, expanding it from within.

A Synergetic Polyphony of Practices



Success comes from the polyphonic interplay of practices

- It is **Continuous**: we move step-by-step ('methodology growing', 'piecemeal growth')
- It is **Emergent**: the particulars emerge as we move (learn as we go)
- It is **Holistic**: involves movement across wholes within the organization ('cake slice' unfolding)
- It is **Native**: Emerges from, and is tailored to, the strengths, styles, and capacity already there.
- Involves top-down, bottom-up, and planned change movements.

Contact Information

Michael Hamman

michael@ecosystemae.com

www.ecosystemae.com

www.beautifulsystems.org