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AgileSHIFT™

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WorkBook

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An Introduction to AgileSHIFT

Today most organisations recognise that the business landscape is varying, and if they want to survive, they need to welcome change. The most powerful and persistent factor that has brought about important transformation has been the rise of digital technology. This tech shift has been the leading cause of change, driving the rise of new disruptive organisations.

Transformation is essential. But at the same time, it is hard to attain.

AgileSHIFT is our new solution for enterprise agility. This lightweight, tailorable framework provides explicit guidance on the known barriers to successful transformation, providing both individuals and organisations with accessible, practical, and solution-driven guidance.

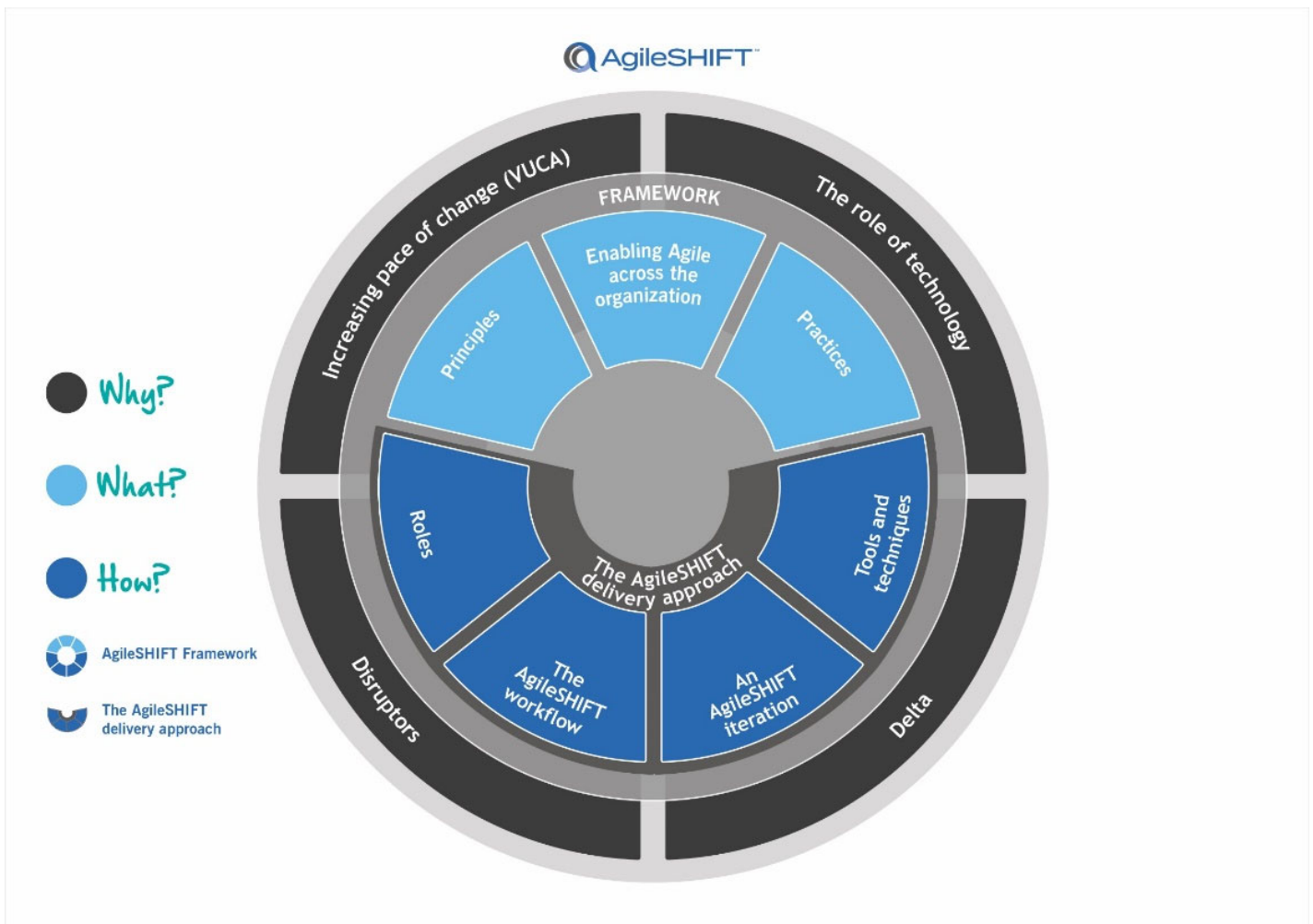
AgileSHIFT has been designed to be used by the entire organisation, regardless of role, function, or seniority. By enabling the whole organisation to learn and understand the value and benefits of agility, and where and how it should be adopted, the organisation can begin to transform.

An AgileSHIFT certification will equip you to:

- recognise and understand why the transformation in your organisation is necessary.
- utilise agile and lean ways of working to be able to work in more agile practices immediately.
- be part of a culture of organisational-wide agility.
- use the tailorable framework to champion change within your organisation.

The framework includes:

- Five principles and practices for the entire organisation.
- An iterative delivery method involving roles, workflow, competencies, tools, and techniques.
- These elements combine to enable the whole organisation to embrace agility. The below diagram provides a visual summary of these elements.



Domain 1: Understanding Why Organisations Need to Create a Culture of Enterprise Agility

About VUCA and the Increasing Pace of Change

Organisations have always been subject to constant change, and there are several different, dynamic, and sometimes conflicting drivers for this involving:

- Technological innovations
- Working practices (e.g. Outsourcing, mergers, and partnerships)
- Raised demands from regulatory bodies
- For the public sector: changing governing policies and parties

However, there has been a significant shift in the extent and pace of this change during the 21st century. Regardless of the organisation's size, structure, sector, location, or offering much of this continuous flow of change is accelerating and overlapping. So that several large, mature organisations have been significantly disrupted or even eclipsed in recent years. Within this new context, other companies related to maintaining continuity and stability find themselves uncertain about how to answer.

Today, the fast-changing and dynamic nature is best explained by **VUCA**, a term now broadly utilised by organisational leaders. VUCA stands for:

Volatility: The speed, nature, and dynamics of change which Organisations face that those changes can be more vital and more frequent than anything previously experienced.

Uncertainty: Uncertainty follows volatility. Unpredictability leads to a lack of understanding of issues, events, and outcomes. Old certainties have evaporated.

Complexity: The diversity of factors and issues, some of which may be intricately interconnected, results in no apparent cause and effect chain and confusion.

Ambiguity: The difficulty of understanding and lack of clarity exactly what the situation can result in a 'haziness' of reality. We are in a world where we have concepts like 'fake news' and 'alternative facts'.

Those organisations that have woken up to the VUCA world challenges, and have learned how to change themselves through efficient leadership, enterprise agility, and strategic control, are more likely to prosper and survive than those which remain bound to more traditional practices and methods.

The Increasing Role of Technology

The most pervasive and influential factor that has brought about significant transformation has been digital technology growth. Other developments like economic growth, globalisation, political upheaval, and cultural and behavioural change could not have occurred on a recent scale without it. Technology has become the primary cause of variation, and it touches everything. The development of technology has an important impact on the expectations of those who consume the services and products offered by all organisations. This shift in relationship dynamics has been defined as a move into 'the age of customer'.

A customer is a person, an organisation, or a group that will benefit from the value delivered by the work.

Customers now have access to more:

- Services and goods available 24/7.
- Information regarding alternatives/competitors.
- Advice from a broad social network of connections.
- Opinions and perspectives of thought leaders, public figures, and celebrities.
- Forums and platforms in which to share their post reviews and experiences.

The technology's involvement in day-to-day lives and our work has resulted in a 'tech-shift', characterised by the move of society through three different yet overlapping phases: the tech-supported, tech-enabled, and tech-centric:

Tech-supported: Refers to activities that were manual earlier but can now be carried out with computer-based support.

Tech-enabled: Refers to previously manual activities which have now been enhanced by automation.

Tech-centric: Refers to activities that would not exist without technology.

It is significant for organisations to know tech-shift and to leverage the available technology to be more effective, remain competitive and deliver better value to customers. Tech-shift offers opportunity as well a threat in equal measure. In particular, digital technologies' risen impact has been a significant enabler for 'disruptor' organisations.

Key AgileSHIFT Concepts

Disruptor

It is an entity that changes how a sector or industry operates, particularly in a new, more efficient, and unexpected way. It may form a market where none existed before. It can be expressed through or caused by digital capabilities, assets, and channels.

The Delta

The delta refers to the difference between where the organisation wants to be and where it currently is. This could be measured in terms of performance, capability or value delivered. The larger the delta, the higher the vulnerability of the organisation to disruptors and competitors.

Value

The benefits delivered in proportion to the resources put into acquiring them.

Agile: An umbrella term for a collection of techniques and frameworks that allow individuals and teams to work in a way typified by prioritisation, collaboration, time boxing, iterative, and incremental delivery. Many particular methods (or frameworks) are classified as Agile, like Scrum, Kanban, and XP

agile: A style of working and mindset characterised by quickness of response, adaptability, and flexibility. There is a difference between an agile team or organisation (lower case 'a') and an Agile method (upper case 'A'). It is beneficial to clarify the uncertainty that sometimes exists over the relations among Agile, agile, and enterprise agility.

Agile, agile, and Agility

'Agile' (upper case 'A') applies to Agile working methods defined by several characteristics. These are:

- **Delivery-focused:** The method is usually best suited to the delivery of services, products, and change.
- **Iterative:** Iterations assure the regular delivery, feedback, review, and redefinition of the deliverable/output, change, or service.
- **Incremental:** Delivery of service, product, or change happens in an incremental or stepwise fashion
- **Time-driven:** Timeboxes remain fixed by delivery and flexing cost.
- **Simple processes:** Flexibility and speed are favoured over governance and control.

Agile (upper case 'A') is mostly concerned with the method an organisation uses to deliver new services, products or outputs, whereas agile (with a lower case 'a') is a description of the mindset an organisation adopts while undertaking this work. Organisations that want to be truly agile concentrate on meeting the continually developing market and customer requirements by leveraging technology, assets, and people. This ability to adapt and move quickly across the whole organisation is identified as enterprise agility.

Definition of Enterprise agility: An organisation's ability to adapt and move quickly in response to shifting market and customer requirements. AgileSHIFT encourages and allows enterprise-wide agility. This agility is viewed in the organisation's delivery parts, and in each part of the entity, which mainly supports those who deliver. AgileSHIFT supports and explains this enterprise-wide and holistic approach.

Enablers for Disruption

Disruption may come from a wide range of sources. Technology has significantly lowered many of the barriers to entry into many markets, thus adding to the increased pace of change and disruption opportunities.

Those who seek to disrupt are enabled and encouraged by several factors, including:

The Gig Economy

There has always been a workforce proportion who work on a temporary contractual basis instead of a permanent employment structure. As individuals and organisations become more enabled by technology, they can find each other and build relationships. This decreases the need for large office spaces and formal employment contracts and facilitates payment and work on an ad hoc basis. This ad hoc individual payment and work agreement are both known as the gig economy: a flexible labour market characterised by the short-term contract's prevalence or freelance work instead of permanent jobs. This employment model has clear benefits for quickly developing start-up organisations.

Remote Working

The rising effect of technology in organisations and the availability of processing storage, power, and tools to people implies that the requirement for co-location of workers and work is now significantly decreased for several roles.

People can work from their home, local office, or even a cafe as globally distributed team members, decreasing the overheads associated with managing large, long-term office spaces and enabling small organisations to access expert skill regardless of location.

Cloud Storage and Processing

Historically an important cost for new entrants into a technology-driven market was that of the technology itself. Computers, software, storage and the people to build, maintain, manage, and derive value from them all have related

costs. Many providers offer to eliminate this high-risk investment requirement from new entrants and start-ups. By paying or renting for services and products by unit used, organisations and people can benefit from class-leading services and solutions without maintenance charges and high set-up costs.

A cloud is data services and solutions which are hosted remotely and are often paid for on a per-use or availability basis offering a less risky, cheaper business model for new entrants.

Online Presence

It is very simple for a small organisation to appear more experienced and successful than it is really by leveraging digital resources. Websites, podcasts, social media, video uploads, and references from other established websites contribute to web presence. As people rapidly turn to the internet first for information and advice, web presence becomes more significant.

A small organisation offering a user-friendly, well-designed, web experience may be a more attractive partner or vendor than a more stable and larger organisation that does not exploit its digital assets efficiently.

How an Organisation Can Understand their Delta and Nature & Effect of a Threat Gap

The enhanced speed of change, the threat of disruption, the rise of new technologies, and the likelihood of an ineffective market can all lead to the development of a gap between where an organisation currently is in terms of its market position, capability, and offers, and where it could or requires to be. In AgileSHIFT, this 'threat gap' is known as the delta (or Δ).

The delta can be understood by considering the following points:

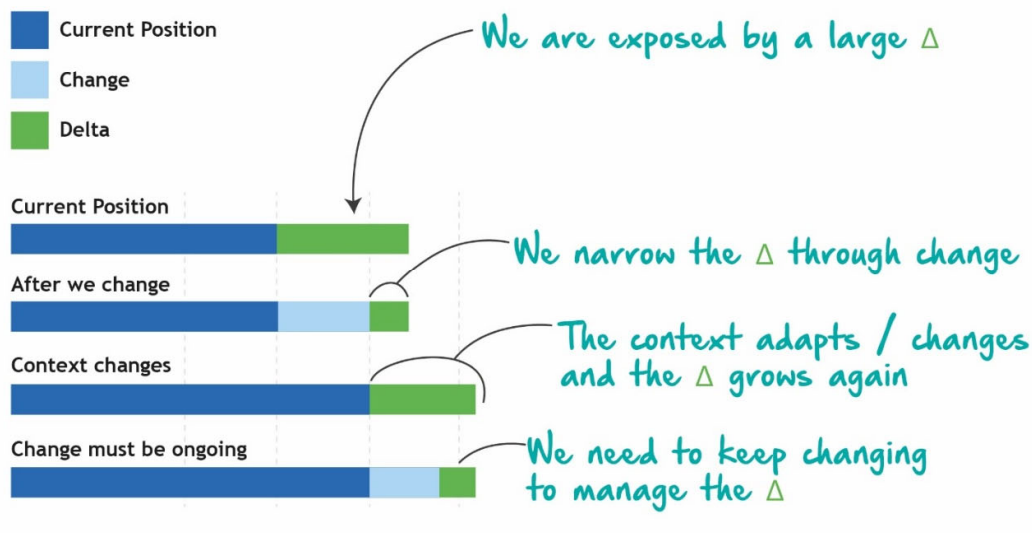
- Where the organisation currently is.
- Where it wants to or could be.
- Where the competition is already or moving towards.
- The expectations of customers.

- How the organisation can transform from its recent position to becoming better/the best it can be.
- How strategic goals are aligned with a future desired state.

Surviving and competing is about:

- Identifying that there is a gap
- Understanding its scale and nature
- Taking action to narrow the gap.

However, there is another crucial aspect to the delta; it is not static. The possible performance level and desired target state will continually move as the broader context changes and develops. As the delta grows, the organisation must continue to understand it and take action to narrow it if it wants to survive.



Traditional Responses to Change

When faced with the requirement to transform how they operate, be it on a small or large scale, organisations have many frameworks, methods, and approaches to select from. Some are specific to a particular industry, whilst others are more general in their application. When utilised well, they each have their merits and strengths. For several years the most popular approaches towards the delivery of transformation management and organisational change were the well-established and related methods of the portfolio, programme, and project management (PPM).

PPM involves managing the delivery of value-creating services and products, coordinating these deliveries and related business-as-usual (BAU) activities to deliver change as a programme, and manage programmes across the organisation as a portfolio. The coordination of these three approaches helped the organisation bring about beneficial and valuable change, whether the approaches were taken in combination or individually. But as Agile approaches were evolved, organisations began to change their strategies.

The rise of new entrants, whether disruptors or innovators, resulted in several larger established organisations attempting to emulate start-up companies. Frequently they did this by making their version of a start-up in the form of an innovation lab, innovation hub or 'greenhouse'.

These were mostly made as separate entities with the brief of using Agile approaches to create new products, ideas, and ways of working. These innovations would then be 'scaled-up' and adapted to be utilised by the rest of the organisation. Though, that was frequently where the problems arose. Trying to bring change by separating innovation from the central part of the business created two different 'groups'. It led to the problem of change appearing to be forced on the organisation from the outside.

Run the Organisation; Change the Organisation

In both examples (transformational programmes and Agile innovation hubs), there is usually a separation of the organisation into Run the Organisation (RTO) and Change the Organisation (CTO) elements, with the CTO individuals rolling out and planning the changes they consider essential.

The RTO individuals then have to accept any changes made and incorporate them into their working ways. Changes to an organisation are frequently perceived as a significant upheaval, and the results might involve customer loss, personnel departure, and risk to the survival of an organisation.

The situation can be summarised as follows:

- Several organisations seek a state of optimum effectiveness.
- They want to extract the highest sustainable value from each participant in its value creation.
- Resources should be fully involved with the delivery of value at all times. However, those resources are so focused on delivering in the current context that they fail to improve their work.

When those who build and maintain the delivery of value are fully involved in doing their daily work, there is less time or requirement for thinking regarding the change. This, in part, is why transformation takes so long in these organisations. The solution to this problem was teams of people or a separate team working as a change function. The CTO individuals would analyse the work being done by the RTO individuals and define how that work could be done more effectively. The RTO individuals would be processed by a change cycle created without their input and would then be anticipated to make the improvements promised by the CTO individuals. This separation of CTO and RTO was, and is, practised in several sectors across the world. It is an outmoded model for all but the most static of industries. It can pose a significant risk to surviving organisations in sectors and markets that face change at an accelerating pace.

The Alignment of RTO and CTO

AgileSHIFT specifies that CTO cannot be separated from RTO for organisational agility to be a success. People may have more accountability for one or other roles. Still, everyone is liable to assure that value is delivered, and to identify, plan, and execute change to deliver that value. In other words, CTO is an essential part of RTO. In AgileSHIFT, everyone in the organisation is a change enabler, empowered to identify and respond to opportunities for greater value delivery levels.

Large-scale organisational change should still be handled by transformational change specialists (like business change managers and programme managers), but they should be supported by teams and people who can identify and act upon the chances for small- to medium-scale and local level change to the organisation.

For this to succeed, not only these specialists need to be trained, authorised, and equipped to bring high-impact change, but the culture must embrace change so that:

- Change becomes part of everyone's role.
- Every individual is empowered and encouraged to feel responsible for identifying chances to change, owning the improvement the change will bring, and optimising the value the change will create.
- At all levels, these changes are allowed by more established approaches such as Managing Successful Programmes (MSP), and those more recently defined, like Agile.

It is not the purpose of AgileSHIFT to embed or teach these approaches; however, some knowledge of them is important to those in and close to changing and transforming organisations.

Multimodal Working

Every organisation is unique. Even in one industry or sector, organisations differ in composition, culture, ethos, and style. They also vary according to their working practices as well as the size, and the kind of value they create and deliver.

The requirements of the individuals, tasks, processes, tools, and other components that make up these complicated entities require to be understood so that the various methods of working can be made relevant for those delivering the work and the work itself. This is known as multimodal working.

Within change initiative or one programme we might see a PRINCE2® project, a PRINCE2 Agile project, proof of Scrum working, a Kanban delivery, and even a very unstructured piece of work, all contributing to that initiative. Any or all of these approaches can assist in delivering client and user value. The objective of AgileSHIFT is to equip and encourage all areas of an organisation to become more agile in the most relevant way.

There is a huge amount to be gained by embracing several ways of working, developing agility, and becoming better capable of running and changing the organisation.

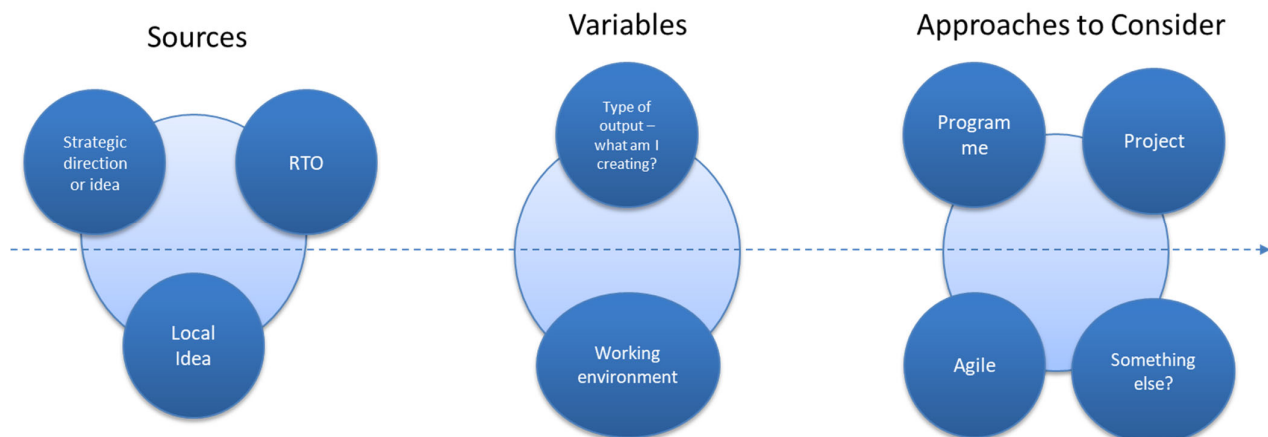
Enterprise Agility and the Creation of Smaller-scale Agility

Best-practice thinking in Agile approaches is drawn by AgileSHIFT framework to create agility at the enterprise level and at the individual and team levels, providing rise to smaller-scale agility.

This agility will develop through:

- Everyone in the organisation trying to be agile in the way they work with, and help other teams.
- A willingness to adopt a multimodal approach at all levels instead of following one single ideology.
- The development of a general transformation terminology across all teams.

Working of Multimodal:



Benefits and Barriers to Enterprise Agility

As we have seen, AgileSHIFT describes enterprise agility as the capability of an organisation to move and adapt immediately in response to shifting market needs and customers.

This definition identifies that RTO and CTO are diverse expressions of an organisation, yet they must work in close association with each other to benefit the whole organisation. For an organisation to remain competitive and keep up with the accelerating pace of change, it must change:

- The mind-set of its people
- Its expectations
- Its governance, controls, and processes
- Its working ways

So that it can:

- Adopt a ‘survive, compete, and thrive’ mind-set.
- Undergo transformational change.
- Narrow its delta, to get closer to where it wants to be.
- Embrace a range of agile, structured, and hybrid approaches.

Benefits	Barriers
Greater innovation	Traditional ‘silo’ mentality
Improvements in productivity	Long established culture
The increased ability to transform	Pressure to deliver this month’s objectives
Better organisational change management	Complacency
Growth	Lack of buy-in at all levels
Better protection against disruptors	Outdated procedures, processes, and rules

The Path to Value

It is mainly beneficial to consider the 'path to value' as a simple way of expressing the steps towards the realisation of benefits and creation of value. Although it is not a simple, single-relationship path from outputs to value creation, it is important to understand the sequence of relationships.

Definitions

Outputs: The deliverables of a project or planned activity.

Outcomes: The new operational states resulting from utilising the outputs of an iteration.

Benefits: The measurable improvements resulting from outcomes, perceived as advantages by one or more stakeholders.

Value: The benefits delivered in proportion to the resources put into acquiring them.

It is significant for individuals and organisations to comprehend that transformational change is unlikely to attain all the desired outcomes, and ultimately value when it is:

- Limited to only one or a few teams or silos in the organisation.
- Considered as a singular event that is started, progresses, and is finished.

The companies that will succeed today and identify that transformation is a continuous process in the future. They do so by:

- Identifying threats and opportunities as well as inefficiencies.
- Planning to respond to the threats and opportunities, and decreasing the inefficiencies.
- Executing the changes needed.
- Monitoring the change's effectiveness.
- Identifying new or further opportunities, threats, and inefficiencies to begin the cycle again.

Organisations and individuals are challenged to adopt more responsive, flexible, and customer-focused approaches in today's environment. There is a rising expectation for organisations to:

- Understand and concentrate on the customer experience.
- Deliver the means to co-create value earlier and more often.
- Work to regular feedback cycles.
- Offer uninterrupted services on demand.
- Continuously improve.

Multiple Choice Questions 1:

1. Complete the below sentence.
AgileSHIFT identifies _____ as a barrier to enterprise agility.
 - a. Change management
 - b. Long established culture
 - c. Greater innovation
 - d. Improvements in productivity

2. Which of the following best describes the characteristic of Agile (with a lowercase a) frameworks and techniques?
 - a. Description of the mind-set an organisation adopts while undertaking the work
 - b. Iterative and incremental
 - c. Mostly concerned with the method an organisation uses to deliver new services, products or outputs
 - d. All of these

3. Which statement best describes the term “The delta”?
 - a. The benefits delivered in proportion to the resources put into acquiring them
 - b. An entity that changes the way in which a sector or industry operates, particularly in a new, more efficient, and unexpected way
 - c. It refers to the difference between where the organisation wants to be and where it currently is
 - d. None of these

4. Which level of managers become the way that the organisation navigates its way through the changes being made in response to the VUCA world?
 - a. Middle managers
 - b. Team managers
 - c. Senior managers
 - d. Project managers

5. In context of path to value, the term “outcomes” refers to
 - a. The deliverables of a project or planned activity
 - b. The measurable improvements resulting from outcomes, perceived as advantages by one or more stakeholders
 - c. The benefits delivered in proportion to the resources put into acquiring them
 - d. The new operational states resulting from utilising the outputs of an iteration

6. Choose the sources of multimodal from the following
 - i. RTO
 - ii. Working environment
 - iii. Programme
 - iv. Local idea
 - v. Agile
 - a. i and ii
 - b. ii and iii
 - c. i and iv
 - d. i, iii and v

7. A cloud is data services and solutions which are hosted remotely and are often paid for on a per-use or availability basis offering a _____ business for new entrants.
 - a. a less risky but costly
 - b. high risk but cheaper
 - c. a less risk and cheaper
 - d. high risk and costly

8. Which among the following is a variable of multimodal?
 - a. Working Environment
 - b. RTO
 - c. Project
 - d. Local Area

9. In VUCA, 'A' stands for _____.

- a. Application
- b. Ability
- c. Ambiguity
- d. Assurance

10. Which among the following statement(s) is/are true?

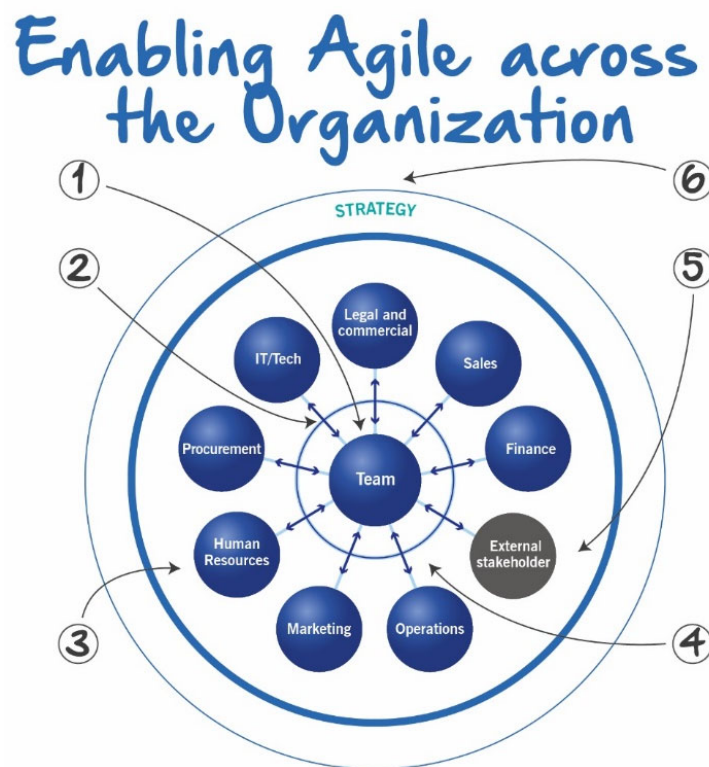
- a. Tech-supported refers to activities that were manual earlier, but which can now be carried out with computer-based support
- b. Tech-enabled refers to previously manual activities which have now been enhanced by automation
- c. Enterprise agility refers to the ability of an organisation to move and adapt quickly in response to shifting customer and market needs
- d. All of the above listed

Domain 2: Understand the Key Concepts of the AgileSHIFT Framework

Enabling Agile Ways of Working Across the Organisation

The whole organisation needs to develop agility for the co-created value to be fully optimised. Organisations are a collection of contractors, employees, customers, and suppliers, and the broader stakeholder community. All of these groups communicate to define, plan, enable, co-create, and deliver value. The complicated aspects of an organisation, involving its activities, individuals, tools, and processes, all connect in nuanced, interdependent ways.

The introduction of an agile way of working in one part of the organisation, while possibly proving locally efficient, is unlikely to accrue an organisational benefit. If this whole organisational approach to agility is not followed, a team that has adopted agile ways of working may eventually be hindered by other teams, external and internal, that have not similarly adapted. The team may even require to revert to its previous working ways to deliver anything.



1. **The team:** This can be any portion of the organisation that brings some product or service to a customer or to another team within the organisation. The team has been located in the centre of this diagram to more easily demonstrate that it is interacting with every other element of the organisation, affecting and being affected by them.
2. **Who supports the team?** Conventionally, a number of organisational functions are referred to as support functions. Yet, we need to take a broader view than that, and consider that there is a sense of mutual support across the organisation.
3. **Using HR as an example:** To demonstrate the concepts, imagine that the HR department has made a decision to change the way in which it records resource usage across the entire organisation in order to deliver benefits and value in efficiency and effectiveness. HR now sits in that centre becoming, for this example, the team.
4. **Mutual support:** For the HR initiative to be successful, every other part of the organisation will need to change some of their ways of working, as that success is totally dependent on their responses.
5. **External stakeholders:** Successful organisations will generally consider external suppliers and stakeholders to be an integral part of their ecosystem. They play an important role in the co-creation of value and so it is important that they are seen as part of the wider organisation, understanding and responding to the changes being made.
6. **Organisational alignment** This is an important strategic goal. It is essential that different initiatives become aligned and therefore move in the same direction.

Organisational Strategic Alignment

In small organisations with a single guiding purpose and flat structures, the links between strategic aims and the work performed by each individual in the organisation are clear. These links are maintained in ad hoc ways, like in informal discussions, and more formal ways like reporting and planning.

The larger and more hierarchical an organisation becomes, the greater the risk that the reason for a specific process or piece of work will become detached from the objectives of the organisation.

When the strategic reason for work is separated from the work, the work may lose its alignment with the organisation's strategic intention and hence become worthless to those purposes.

Work must be related to, and be performed in line with, particular needs and to satisfy the defined strategic objectives. As we have seen, some organisations have found this to be a problem while they try to introduce Agile approaches and techniques, as agile teams may be working in a way that is entirely independent to the rest of the organisation

This situation is worsened if those other organisational parts do not comprehend the Agile approach being utilised. For optimal efficiency, organisations must seek to attain 'buy-in' from, and the empowerment of, everyone working in (and with) the organisation.

In this hierarchical structure, authorisations and decisions for work to begin are passed from level to level. These levels are:

- **Strategic Leadership:** Setting the strategic direction, and monitoring and adapting it as needed
- **Middle Management:** Managing departments or teams and sponsoring any local initiatives
- **Team Members:** Working to plan, deliver and embed changes (CTO) while satisfying the RTO obligations

Value is co-created and optimised through the relations of organisations, teams, and clients. Teams own their working environments and local processes to deliver value-enabling work outputs. This value is accumulated as the management layers pass it back up.

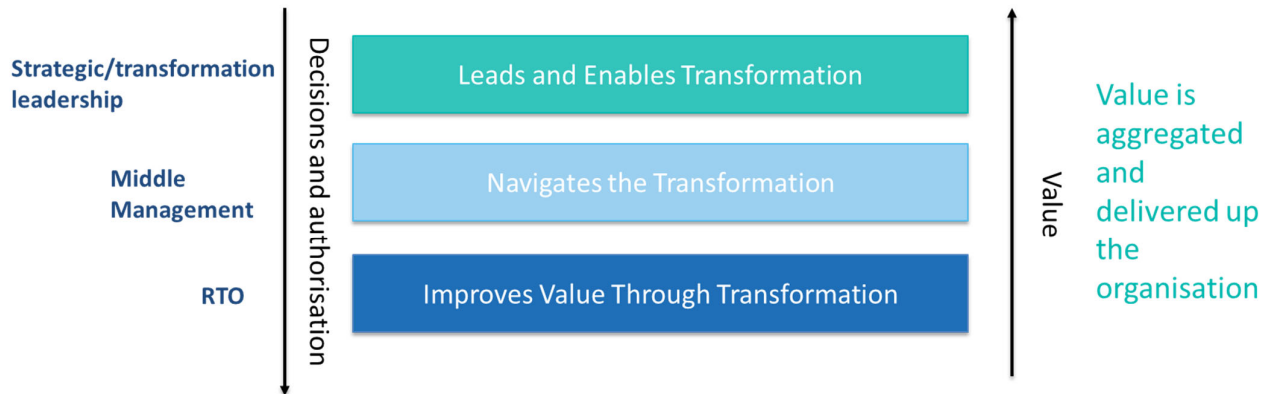


Figure: Linking strategy to value throughout the organisation

The Key Role of Middle Managers

The management level has an essential part to play in assuring that there is strategic alignment during the organisation. In a study into large-scale change, a hallmark of success was seen to be the engagement of mid-level managers at two or more levels below the senior executive leaders.

In those cases, mid-level managers were not only managing incremental change; they were managing it by working levers of affect up and down their organisations. These middle managers become the way that the organisation navigates its way through the changes being made in response to the VUCA world and being the way that the RTO level understands top-down transformations, they also give efficient feedback from that level to the strategists at the leadership level.

When changes occur, supervisors and managers may be the biggest supporters, but also probably the biggest opponents. They are closest to the employees who require to support the new behaviours and processes needed by change initiatives. Yet in several cases, the changes will influence the position and work of the supervisors and managers and may be taken in a very negative way, resulting in change resistance.

Hence, middle managers require the skills to create a positive contribution to the new, agile ways of working and to be seen as:

- **Communicators:** Communicating information regarding changes upwards and downwards.
- **Supporters:** Showing personal support to teams executing agile ways of working.
- **Trainers:** Educating and training employees in the benefits of enterprise-wide agility and team.
- **Collaborators:** Working with other teams across the organisation.
- **Persuaders:** Identifying and managing resistance to new ways of working – involving their own.

To summarise, the role of middle management includes:

- Assisting the team in playing its part in significant transformation programmes.
- Facilitating and supporting teams to work in a more agile way.
- Assuring that all small-scale initiatives are entirely aligned with corporate direction and strategic goals to deliver co-created value.

The following figure shows the role of middle management as transformational navigators:

AgileSHIFT Principles

The AgileSHIFT principles reflect the fundamental behaviours and attitudes that underpin the successful transformation. If any of the principles are ignored, it decreases the success chance. All these principles are essential to all the work undertaken by the organisation

Definition of AgileSHIFT Principle: The guiding responsibilities that underpin successful organisational transformation through the application of AgileSHIFT.

There are two essential features of the AgileSHIFT principles:

- They are universal in that they apply to the whole organisation utilising AgileSHIFT.

- They are empowering, as they describe ‘the way things should be’, and hence provide everyone involved with greater ability and influence to shape the work they do.

Principles are significant as they make a compass to which you can refer whenever something is in doubt, and you require to take a position or assess a particular opportunity, situation, or behaviour.

Furthermore, principles can assist you in determining your values and goals, and help you to choose between them when confronted with conflicting issues or circumstances.

There are five AgileSHIFT principles:

i. The change will happen, so embrace it.

The change should not be seen as an occasional, singular, or supplementary process. It should be a constant, all-encompassing activity that is embedded during the organisation. To achieve this, it must be an essential part of the daily work of everybody in the organisation.

Everyone is an agent of change to a greater or lesser extent and is also included with identifying, progressing, allowing, and achieving change in parallel with their RTO work. Change is both a success skill and survival skill. If teams, individuals, and organisations do not learn to embrace change and move forth, they will be left behind. So, whether it is changing the business's focus, adopting new technology, or learning new skills, embracing change is necessary.

Several organisations have traditionally separated RTO from CTO. This separation was an attempt to simplify a complicated environment, yet it tends to generate a fear of change and causes the organisation to frequently under-deliver on its purposes. Moreover, there may be a viewpoint that those performing RTO will always be resistant to the change produced by CTO.

In today's VUCA environment, it is unavoidable that the boundary among RTO and CTO will become blurred. Everyone in the organisation should share obligation for RTO and CTO, and feel empowered to assist in bringing change. Individuals are more possible to embrace change when they comprehend that the change is not something beyond their control or forced upon their work, but simply another aspect of their role and small,

incremental changes will tend to be easier to comprehend and implement than large changes delivered all at once.

ii. Focus on the co-creation of customer value.

The purpose of an organisation is to serve and satisfy its customers in the value's co-creation, and the purpose of any enterprise-wide change is to optimise that value. This must be the primary focus for any organisation; without it the organisation has no efficient strategic direction and risks becoming inappropriate.

In a survey, less than half of the executives who responded said that they were confident that they could realise sustainable value from the business transformation. Focusing on customer value implies that the members and leaders of the organisations should identify the requirements of customers, users, suppliers, and stakeholders

They must also be capable of anticipating the next requirement, as an unsatisfied requirement forms a delta and this is a chance for disruptors and a threat to the survival of a company

A focus on the creation of customer value implies more than simply surviving. Focus on customer value is a whole-entity challenge and implements to the entire organisation in everything that it does. The principle is regarding serving the stakeholders and market properly at all times.

The significance of being customer-centric in an increasingly tech-centric world cannot be overemphasised. Value is not something that we merely create and then pass on to a customer. The customers and other key stakeholder's close involvement in the co-creation of value is necessary if we want to be value-optimisers.

iii. Develop an environment where everybody adds value.

In any organisation, every hour of work performed in the organisation should provide value which supports the strategic vision and direction. An hour spent which does not support this is an hour wasted. The opportunity cost of that hour is the value which could have been created in favour of the organisational objectives. This principle concentrates on individuals. Where any person or team is not supplying optimum value, the

organisation should support them in changing their behaviours and processes so that their contribution rises.

Where management and leadership do not positively encourage this contribution, they are making a culture that works against this principle. Leadership, senior, and middle management act as role models in forming an environment where everybody adds value. Hence, the leadership systems, behaviours, and processes should be aligned with this principle. The organisation should make it a priority to assure that everyone is suitably equipped, trained, and allowed to show and offer optimum value.

iv. Challenge the status quo.

Organisations can easily become complacent regarding their place in the market, mainly if they are profitable and have a steady customers' stream. This mind-set is best represented in the expression 'If it is not broke, don't fix it'. One way of answering to complacency is to encourage individuals to challenge certain ideas and beliefs that make the status quo. Though, people may feel unable or insufficiently empowered to question ways of processes and working that are already firmly entrenched in organisations. This means that their understanding and knowledge of the work done may be insufficiently leveraged for the benefit of organisation, its customers, and stakeholders.

Everyone in the organisation, and all those who communicate with it, should feel capable of questioning the status quo and have the channels available to express their thoughts to management and leadership tiers. An essential feature of several innovative competitors and new market entrants are a flatter and non-hierarchical management structure.

In other words, they have some layers of hierarchy among those who do the daily tasks and those who lead and administer them. The route from observation at task level to decision-maker is short in flatter structures, and the parties are generally known to each other. Identification of enhancements and action taken on the basis of those observations promptly becomes part of the way of working. Where companies have several hierarchical layers, there is a large distance among those who do the daily work and those who take decisions.

This implies that identified enhancements are frequently lost among the decision-maker and operator. This inefficiency leads to an opening delta. To

close this delta, either open a direct path of interaction among operator and decision-maker (while still involving any management stakeholders) or flatten the hierarchy. Ideas can come from any individual in the organisation, despite their role. AgileSHIFT encourages individuals to contribute ideas and ask questions to drive change.

v. Tailor your approach.

Several larger organisations have accurately identified that they are facing a changing environment, and their leadership and management teams have triggered actions to answer to this. Usually, leadership teams will strive to imitate the successes of small start-ups. This is a tempting idea because the tech-enabled and smaller competitors are rapidly gaining success and market share.

The problem with this idea is that models who work for small start-ups are usually owner-managed and backed by investors; they are not ones that can be transferred to established, large, regulated, and already very bureaucratic organisations. Start-ups and large established organisations are very diverse in nature, and these variations must be taken into account.

Restricting teams or organisations to one particular method (e.g. Agile or Waterfall delivery approaches) is not desirable as diverse parts of the organisation will work in several ways. Approaches to delivery should be tailored to the organisation, to particular teams, and the nature and scale of the work included. This implies choosing the accurate approach for every piece of work, regardless of how others in the market are working. If an organisation takes a holistic approach while choosing the way a piece of work will be finished, it will make the best choice for its way of working.

Testing the Principles

The AgileSHIFT principles reflect the fundamental behaviours and attitudes that underpin the successful transformations. They define the features of successful agile ways of working and act as the main point for setting the important things which are required for success.

Understanding how the principles are being applied efficiently and the effect they are having across the organisation is crucial to guide future focus. For instance, if individuals are feeling more positive regarding change but are still not putting customer value at the core of everything they perform, they might begin making changes just for the sake of changes, which are not actually delivering value

The following points explain some ways in which the adoption level and influence of the principles can be measured. There are several others that could also be considered:

- **The change will happen, so embrace it:** Measure attitudes regularly towards change and analyse examples of change resistance. Correlate that with overall levels of staff happiness.
- **Concentrate on co-creation of customer value:** Benchmark customer perception of the value being delivered by the organisation, then measure against that benchmark at regular intervals.
- **Develop an environment where everybody adds value:** Assure that all staff are measured transparently on the basis of results and benefits instead of outputs.
- **Challenge the status quo:** Track how frequently staff are asking 'why' rather than just following instructions blindly. Capture and highlight where particular challenges have led to major shifts in strategic direction.
- **Tailor your approach:** Evaluate the effectiveness of a selected method or process throughout the review sessions and lessons learned. Capture where an improper method or process has affected quality or time.

AgileSHIFT Practices

Definition of AgileSHIFT Practice

An aspect of working in an agile way that should be addressed continually. There are five practices that must be applied by individuals during any work being done in an AgileSHIFT environment. They should be utilised in a flexible manner which is suitable for the organisation and the work, and in combination with an observance of the AgileSHIFT principles.

The five AgileSHIFT practices are:

1. **Engage stakeholders:** Those who are interested in or an impact over the work and its results should be included from the beginning of the work, giving feedback and advice on progress and value delivered so far. This will encourage the sense of being part of the change, not a subject of it
2. **Build collaborative teams:** Cross-functional teams that span silos are important to efficient value creation. Communication is the key to successful collaboration. Non-hierarchical or flatter decision making structures assist in motivating and optimising individual and team performance.
3. **Plan to be flexible and adaptable:** Plans are not absolute manuals of instruction; they are a guide to what is known regarding the future in the present. Plans will require to change as the context for work changes
4. **Deliver iteratively and incrementally:** Divide work into short, consecutive activity periods with frequent monitoring and feedback loops to assure continued alignment with the agreed results. Aim to deliver value as early as possible to stakeholders, with regular collaboration to assure value co-creation
5. **Measure value:** Assure that the rise in value creation is quantifiable and that 'before', 'during', and 'after' measurements are recorded.

Engage Stakeholders

A stakeholder is any group or person that is affected by the services, processes, work, products, results, and values created. When organisations are small and directly influenced by the stakeholder's behaviour, opinion, and decision-making, they often closely include their stakeholders. This closeness offers the chance for the organisation to comprehend the stakeholders better.

As organisations grow, they can lose sight of the significance of identifying, evaluating, managing, and interacting with stakeholders, concentrating rather on preferences and internal issues. Stakeholders engagement is important to any organisational success, and AgileSHIFT states that engaging closely with them is a core practice of working efficiently in agile ways.

Engagement is More Than Management

Stakeholder engagement is more than a system of tasks and managing things. Stakeholders are groups and individuals with feelings, needs, perceptions, and influence.

They do not appreciate efforts to manage them. Rather, engagement tries to take several agendas of stakeholders seriously, comprehend their challenges, and to listen as well as speak (two-way communication). Therefore, it is significant to adopt the right mind-set towards engagement prior to undertaking any communication activities

The Engagement Cycle

It is better not to consider it as a hard and rapid sequence, but rather a broad pathway for engagement, which means that we can go straight to the 'engage' stage if required.

Build Collaborative Teams

It is common for leadership and management in an organisation to divide it into structures which are individually led and managed, and then further split those structures. Most frequently, the outcome is that like-minded and like-skilled individuals are grouped together for administrative purpose and work. Individuals in these teams normally feel better capable of performing well because of this grouping. These groups are usually known as silos.

The problem with silos is that they tend to discourage communication among team members from other parts of the organisation

The team is asked to perform some work, and it only does the part that fits its individuals and skillset

Once completed, the work is given back to the requester who then passes it on to another silo so they can handle the next process

Creating Collaborative Teams

Collaborative teams, with non-hierarchical or flatter decision-making structures, assist in motivating and optimising the performance of individual and team.

Team members should consider the following points to build an environment in which teams can successfully collaborate:

- **Take Personal Accountability:** Each team member should be fully committed to the purposes of the team and to the team itself, taking accountability for their actions.
- **Be Open and Honest:** Be accountable for being heard and understood, while also appreciating the ideas and input of other team members. Keep communication lines open at all times and work to reduce conflict.
- **Trust Other Team Members:** Be supportive at all times and provide others with the benefit of the doubt.
- **Balance Individual, Team and Task Needs:** Identify that sometimes various requirements will take priority. Be aware of individual issues, team dynamics, and the attainment of the goal. Regularly re-adjust priorities because of competing requirements

Empowering People

The main benefit of evolving collaborative teams is that it will build an environment in which people feel empowered. If employees are treated as a simple resource, they will not feel empowered to support organisational change

They will just do as they are told, which is then reinforced with monitoring, reporting, and review cycles

Though individuals are extremely complicated and to treat them as a simple resource is to miss out on identifying chances to deliver more value

It is identified that individuals are motivated by three main components:

- **Autonomy:** The desire to be self-directed
- **Mastery:** The desire to improve
- **Purpose:** The desire to make a contribution

Motivated and empowered individuals and teams will identify the potential for enhanced value of delivery local to them, and then develop this chance to the point where the value is realised

This empowerment impact both those delivering and leading.

Plan to Be Flexible and Adaptable

Planning provides both opportunities and preparations to interact and better understand the work about to be undertaken. A lack of planning will raise the risk of imposing more pressure on the organisation with unpredicted tasks that must be finished as priorities. This may lead to failure.

A survey identified as benefits' range provided to the organisations by good planning. The top ones were:

- Lower development lead time
- Better overall results
- Better analysis

Though, challenges arose when plans were treated as fixed statements, with a surety of events happening at a predicted time, for a predicted cost, and at an expected quality level. Plans should be treated as a general view of an uncertain future around which real events happen. This implies that a plan is not rigid and fixed once approved. Rather, it is approved with the expectation that some change to plans will occur, and decision-makers will be offered the chance to take another look at the circumstances if large changes are required.

There are several advantages to spending a suitable amount of time in planning. Planning can:

- Structure your thinking and identify all the important tasks.
- Prioritise your tasks.
- Provide a basis for estimating your work.
- Identify possible issues and risks in your approach and any corrective actions.
- Provide a focus for the collective efforts of the team.
- Assist in communicating your intentions to stakeholders.

Deliver Work Iteratively and Incrementally

The chance for successful transformation is decreased when a direct changeover approach to rolling out, implementing, and embedding the change is utilised. Usually, the requirement for major organisational transformation is identified throughout some form of business analysis initiative, the work is defined and approved, and then undertaken.

There are problems to be considered with this approach. Initially, the work is usually defined and approved in isolation from those who will be influenced by the work or the results of the change. Secondly, the work is frequently scheduled to take place across months and even years, with no revalidation or redefinition of the requirement.

Iterative ways of working have been developed in response to this challenge. The objective of this is to deliver something of use (an increment) frequently. There are various advantages to this, such as:

- Allowing an early delivery of value to the customer
- Decreasing the risk of delivering the wrong product or service
- Giving confidence regarding how the work is proceeding through evidence and visibility
- Fostering engagement with stakeholders
- Allowing for feedback
- Making frequent delivery of work easier and perhaps second nature

In these models, work is done in clearly defined activity periods. These periods are called stages, phases, or iterations relying upon the delivery approach in use. At the beginning of a work period, the work is agreed among the leaders and those who will deliver the work. During the work, frequent inspection of the work assures progress is observable.

Measure Value

The value chain shows how the co-creation of value is the final goal. Regardless of the specific way of working, getting the value measurement wrong obscures any indication of the value delivered by transformation and change.

Measurement of value should include the following steps:

- Define the value anticipated from the work
- Comprehend the existing level of value being attained
- Plan measurement of value attained during the delivery of change and use
- Monitor the value during the delivery of work and use
- Regularly record and reflect on progress attained, changing course as needed

In several initiatives, leaders concentrate only on value after delivery. This is too late for defining the 'before' state, and hence the effect of any improvement can never be clearly described. If organisations cannot comprehend and measure the impact of their efforts, success cannot be assessed.

Measuring Benefits

Definition of Benefit

The measurable improvement resulting from an outcome, perceived as an advantage by one or more stakeholders. As value is defined as the benefits delivered in proportion to the resources put into getting them, it is important for benefits to be recognised, defined, planned, and measured.

It is useful to consider the following four aspects of that benefit to measure a benefit successfully:

- **Description:** What exactly is the benefit?
- **Observable Outcomes:** What will be the verifiable differences among the pre-and post-change?
- **Attribution:** Where will this benefit occur, and who is responsible for it?
- **Measurement:** How and when will the pre-and post-measurements be taken? How will progress be tracked and measured?

Multiple Choice Questions 2:

1. Choose the correct option from the following
The role of team members in the hierarchical structure
 - a. Managing departments or teams and sponsoring any local initiatives
 - b. Working to plan, delivering and embedding changes (CTO) while satisfying the RTO obligations
 - c. Setting the strategic direction, and monitoring and adapting it as needed
 - d. None of these

2. Complete the following sentence.
'Tailor your [?]' is one of the AgileSHIFT principles.
 - a. roles
 - b. processes
 - c. methods
 - d. approach

3. An essential feature of AgileSHIFT principle is
 - a. They are universal in that they apply to the whole organisation utilising AgileSHIFT
 - b. They are an aspect of working in an agile way that should be addressed continually
 - c. They are limited to the area of organisation where actual work is going on.
 - d. All of these

4. Autonomy is one of the main component by which individuals are motivated. It refers to
 - a. The desire to make a contribution
 - b. The desire to improve
 - c. The desire to be self-directed
 - d. None of these

5. Which among the following is an aspect of working in an agile way that should be addressed continually?
 - a. Ground rule
 - b. Practice
 - c. Principle
 - d. Roles and responsibility

6. Which among the following is not an AgileSHIFT principle?
 - a. Plan to be flexible and adaptable
 - b. Focus on Co-creation of Customer Value
 - c. Challenge the Status Quo
 - d. Develop an Environment Where Everybody Adds Value

7. The term “persuader” in context of middle manager skills refers to
 - a. Showing personal support to teams executing agile ways of working
 - b. Working with other teams across the organisation
 - c. Educating and training employees in the benefits of enterprise-wide agility and team
 - d. Identifying and managing resistance to new ways of working – involving their own

8. With the point “track how frequently staff are asking ‘why’ rather than just following instructions blindly”, which AgileSHIFT principle’s influence and adoption level can be measured?
 - a. The change will happen, so embrace it
 - b. Challenge the status quo
 - c. Concentrate on co-creation of customer value
 - d. Tailor your approach

9. The 'measure value' practice assures that the rise in value creation is _____ and that 'before', 'during', and 'after' measurements are recorded.
- a. Quantifiable
 - b. Economical
 - c. Qualitative
 - d. None of these
10. _____ is an important strategic goal and is essential that different initiatives become aligned and therefore move in the same direction.
- a. Strategic alignment
 - b. Mutual support
 - c. Organisational alignment
 - d. Team support

Domain 3: Understand the AgileSHIFT Delivery Approach

The AgileSHIFT Team

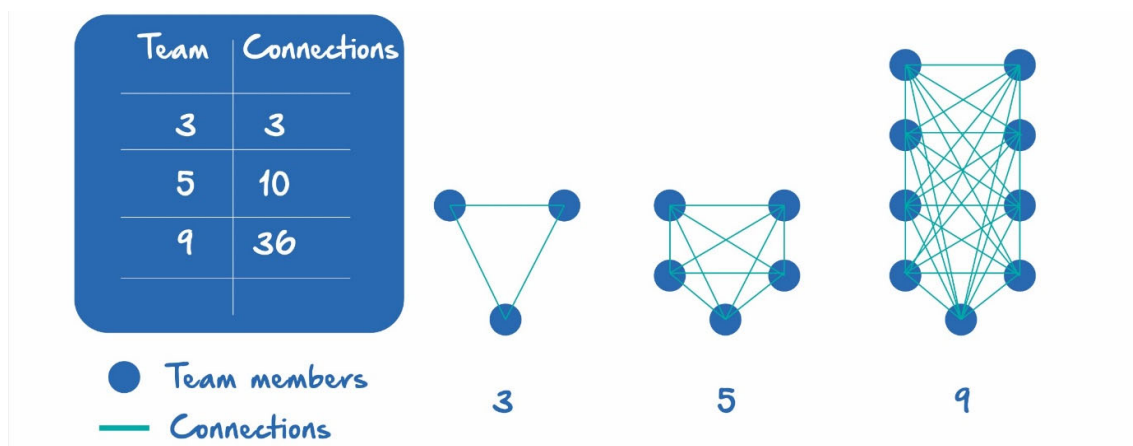
The AgileSHIFT team is any team of individuals who identify the benefit of trying to work in a more agile manner. They may be tasked with delivering something new or normal daily work, such as a product to a customer, change to the organisation, or a diverse service.

The Team Size

Various individuals in the team have a vital effect on the way the team interacts. Hence, its size is significant and based on the capacity for individuals to interact and cooperate efficiently. It has been seen in agile ways of working that having more than nine individuals working closely together introduces a range of communication complexity which is possible to harm the work.

For instance, nine team members need 36 communication connections, and 10 produces 45 connections. Just adding one more individual raises communication complexity by 25%. Any fewer than three individuals working together is simply deemed to be a small activity in many cases, and this kind of work can be run in an ad hoc manner. Though, the team size must always be suitable for the organisation and the task.

The following figure shows that the communication complexity increases as the team grows:



Self-organising Teams

Definition of Self-Organising Teams

Non-hierarchical teams that decide, among themselves, how best to deliver the work, without particular direction from outside the team. Work is approached collaboratively, with a joint commitment to delivering outcomes.

AgileSHIFT teams should by default be self-organising and non-hierarchical, with all members mutually responsible and accountable to each other for delivery. Hence, in many situations, there should be no manager or team leader, but for particular activities, there may be an owner or leader driving it forward. The composition of the team is long-lived and stable, and it owns the work from concept through to delivery, evading the requirement for time-consuming handovers.

Benefits of self-organising teams involve:

- Empowerment through autonomy.
- Mutual trust and respect between members.
- Shared responsibilities and competencies
- Increased customer focus
- Greater employee satisfaction

Effective Teams

Five elements have been shown to contribute to the effectiveness of any team. These elements should all be considered if a team is to develop into a high-performing, fully functioning one, and are as follows:

1. **Clear objectives:** Understanding the goals and mission of the team.
2. **Team roles:** Every team member understanding their responsibilities and roles.
3. **Team processes:** Clarity around how the team will work; the ground rules.
4. **Interpersonal relationships:** Positive, active communication among members of the team.
5. **Inter-team relationships:** There should be robust collaboration among teams. An individual team cannot work successfully if it is separated from others in the organisation.

The AgileSHIFT Coach

The AgileSHIFT coach is liable for:

- Assuring that the AgileSHIFT principles and practices are understood and followed.
- Facilitating meetings.
- Providing and guiding the utilisation of agendas and canvases.
- Teaching new, agile ways of working during the organisation.
- Planning for, and supporting, the adoption of new ways of working during the organisation.
- Identifying opportunities to improve processes, teams, themes, and ways of working.

It is the most misunderstood role in every agile environment, yet it can prove much valuable in the organisation's move towards higher agility. In several organisations, this role is viewed incorrectly as an agile project manager, when rather the coach should be seen as an enabler, facilitator, and advocate for agile ways of working.

They are identified as Subject Matter Experts (SMEs) in Agile frameworks however do not require to be knowledgeable in the specific work the AgileSHIFT team is performing. It is significant to note that the coach can work with more than one team at the same time.

To the AgileSHIFT team, the coach must:

- Be willing to assist individuals in understanding their roles in working in more agile ways.
- Be a crucial friend, committed to assist the teams in developing agility.
- Facilitate meetings and assure that blockers to delivery are dealt promptly.

The AgileSHIFT Sponsor

The AgileSHIFT sponsor is liable for:

- Communicating organisational strategy and task priority to the AgileSHIFT team.
- Endorsing the teamwork and for delivering the products or services to customers at suitable times.
- Helping the team and supporting it to optimise the value it delivers
- Making the go/no go decisions.
- Monitoring and reporting progress to organisational leaders.

The AgileSHIFT sponsor can work at any management level as long as they are the one leading component of an agile initiative. Decisions to continue, stop or pause rest with the AgileSHIFT sponsor. This implies that they have the authority over whether to begin an iteration, and the whole organisation must respect their go/no go decisions. Hence, it is important that the AgileSHIFT sponsor comprehends and is fully committed to the work goals.

The AgileSHIFT sponsor is liable for optimising the product or service's value delivers to customers, stakeholders, and the organisation. They may represent the committee 's desires; however, decisions are made by the AgileSHIFT sponsor individually. Anyone requiring to change the priority of task list item must consult the AgileSHIFT sponsor and the decisions made must be visible and recorded.

The Trigger, Start-ups, and Go/No Go

The Trigger

For work to begin, there must be a reason or trigger to start. For easy work, this trigger may be an idea from a team member, a request from other parts of the business, or a customer requirement for a new function or feature.

For larger pieces of work, the trigger may be a regulatory or legislative imperative, customer order, or the decision to answer to a delta exploited by a disruptive competitor entering the market.

Whatever form the trigger takes, there is an important merit to processing it as soon as possible.

Organisations that lack a coherent process for the fast processing and capture of ideas may well find that a disruptor works more rapidly and is capable of benefiting from a similar trigger. Once the start-up and disruptor has the advantage, it becomes hard for the established organisation to compete and the chance may well be lost for good.

The concept of the delta: the gap among where the organisation is today, and where it could be. As soon as a delta is identified, it should start a gap analysis which would lead to a trigger for some work to address the gap. Though, there are several other possible triggers, involving:

- Identifying that a process is ineffective.
- Identifying a potential improvement to a work practice.
- A request for a small change.

The response to a trigger, whatever its kind, is the AgileSHIFT start-up.

AgileSHIFT Start-up

The start-up step is where the proposed delivery's value is evaluated.

The start-up answers the question: 'Is this worth doing?'

Every work needs to be planned so that those doing the work and those who are interested in it understand when and by whom it will be done, how it will be performed, how much time it will take, and what it will cost.

When teams undertake small work pieces, they can often experience complexities because of the overburdening processes and tools that, while

designed to make attainments more predictable, in fact, decrease flexibility and responsiveness.

The planning work may take anywhere from a few hours to several weeks. Throughout this step, the purpose is to get ready to start work by:

- Understanding the need or want
- Evolving the vision statement
- Defining the justification (business case)
- Creating the roadmap
- Creating the task list
- Finalising the team with agreed roles
- Identifying the risks/challenges/concerns
- Identifying the stakeholders
- Creating information radiators

Any information generated at this point must be at a level of detail suitable to the work being planned. Agility needs some planning, but not over-planning. Plans are not fixed and will change naturally; hence agility and adaptability are key in any re-planning.

The Vision Statement

The main aim of the vision statement is to assure that everyone in the organisation is moving in the same direction. It may take several forms; popular variants involve the 'elevator pitch' and the 'bus shelter advert. However, you select to communicate your vision, it must always be short and engaging.

Beyond selling the big idea to the rest of the organisation and its stakeholders, it acts as a reminder to the team of the essence of what they are striving to attain.

Example of a vision statement: 'AgileSHIFT assists in preparing organisations for transformational change'.

Start-up Go/No Go Decision

The AgileSHIFT sponsor decides at the completion of the start-up step whether to continue or not.

They are liable for optimising the value created and are fully responsible for its success.

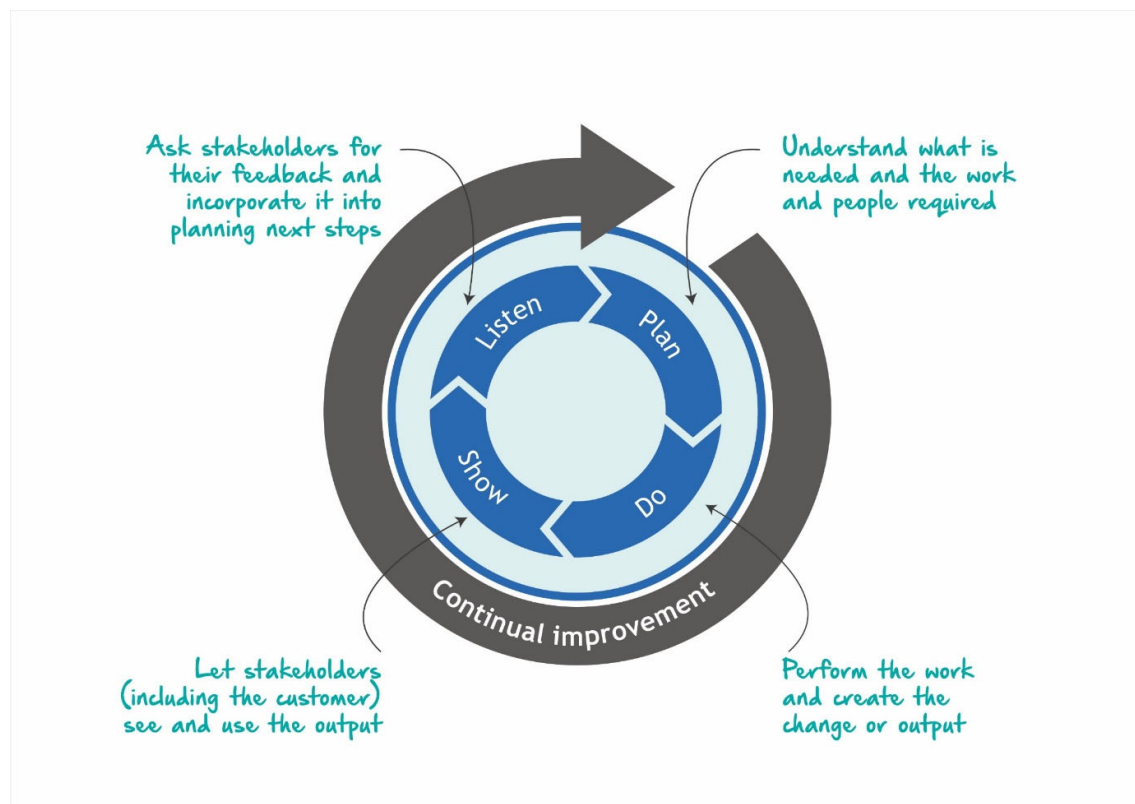
If the decision is no go, then re-planning will require to be carried out, or the work promptly brought to a controlled close.

An AgileSHIFT Iteration

Striving to work in an agile way by utilising overly complicated processes causes unnecessary inefficiency and raises costs and resource usage.

Organisations may find that higher agility will be attained through iterative ways of working, where each iteration includes a cyclical set of four core activities:

- Plan
- Do
- Show
- Listen



Another critical aspect of an iteration is time boxing. Because an iteration has a fixed duration (generally between one and four weeks), it offers several benefits to anyone working in an agile way, involving:

- Encouraging the team to prioritise their work, so that something of value is finished in a short time period.
- Challenging the tendency to overrun on time and cost commitments in the pursuit of perfection.
- Giving the team a real drive, as the short time period raises motivation.

Definition of Time box: A finite period of time within which one or more activities should take place. Most time boxes define the maximum period available; if the activity is finished more rapidly, the time box can be closed early. In the case of an iteration time box, the period is fixed and no early close is allowed, even if the team has finished all promised tasks. Instead, the team will choose further tasks to assure it is delivering output until the period ends. Instances range from day-to-day stand-ups with 15-minute time boxes to longer iterations with fixed time boxes of four weeks.

Go/No Go, Re-plan

At the end of every iteration the question ‘Does this work offer co-created value for the organisation and the customer?’ should be addressed.

Investment decisions associating to work are delegated to the sponsor by organisation leaders, and it is hence the sponsor who, after taking advice from the stakeholders and customers, makes the ultimate decision regarding what to do next.

Usually, this will be whether to:

- Authorise the release of any work deliverables, outputs, or changes.
- Continue to the next iteration.
- Re-plan if required.

Close-out of Work

The ultimate iteration is one where loose ends are tidied up, assets disposed of or made available for re-use, contracts closed, success celebrated, lessons recorded, and individuals are released to other work or retained and prepared for the following initiative.

Any remaining value or value enablers should be made available to the customer and the delivery recorded.

If needed, any support or service needs must be in place and ready to accept responsibility.

Iterative Delivery

There are various ways of working that could be beneficial to organisations and teams wishing to become more agile.

They are all valid as per the particular circumstances, and they involve PRINCE2 Agile, Scrum, and other project management frameworks and methods.

AgileSHIFT is not expected to replace any of these but instead of providing a flexible, simple-to-understand framework that allows any team to become more agile almost instantly.

An iteration includes activities, some of which are related to working directly on a service, product, or change completion, and others which allow that work.

It starts with an iteration planning meeting, which sets up the priorities and work of the iteration.

This is followed by the iteration work and the related day-to-day stand-up meetings.

The iteration is concluded by a value demo and iteration retrospective.

AgileSHIFT Iteration Planning

Every iteration is triggered by a go decision from the AgileSHIFT sponsor. At the beginning of every iteration, an iteration planning session is conducted by the team.

This offers a chance for the individuals who will perform the work to meet and define the work, on the basis of the sponsor's description of business priorities and the entire team's experience and knowledge.

The iteration planning meeting is divided into two parts:

- The first part seeks to comprehend and record 'what' will be performed by the end of the iteration.
- The second part is related to 'how' this will be performed.

The team should spend around two hours of every week of iteration on this activity. Work on the iteration will start once the planning has taken place. The daily stand-up is one of the key activities of the team to allow efficient working throughout this period.

AgileSHIFT Daily Stand-ups

When teams are operating at a fast speed, there is a risk that they will fail to interact appropriately and coordination will become very hard.

The daily stand-up meeting is an efficient way of decreasing that risk.

The stand-up's main purpose is for the team members to synchronise and coordinate their work with the rest of the team.

The stand-up gives:

- A regular check-in where the entire team can show that they are available and involved in the work.
- Clarity regarding what work each person is doing and understanding the effect of that work.
- A significant chance for every individual to listen to details regarding what work the team is performing as a whole.
- Chances to highlight to the rest of the team any blockers and to seek assistance in eliminating those blockers.

The daily stand-up has many features which separate it from other progress or status meetings:

- The team members of AgileSHIFT are compulsory attendees (either in person or virtually); attendance cannot be delegated or transferred.
- The AgileSHIFT coach is an optional attendee.
- Other stakeholders may attend, but only the AgileSHIFT coach and team are allowed to speak.
- The AgileSHIFT coach need not lead the meeting; they are only there to coach meeting structure and behaviours and to take on blockers that others cannot deal with (and work on them individually).
- The meeting should be time-boxed (ideally no longer than 15 minutes, with each member speaking for no longer than a few minutes).
- It should happen at the same time every day, start immediately, and keep concentrated.

During the daily stand-up, three important questions should always be addressed by each attendee in turn:

- What did I do yesterday, involving major attainments (if any) since the last daily stand-up?
- What will I do today?
- What could stop me (i.e. what blockers are in my way)?

The AgileSHIFT Value Demo

At the end of all iteration, the AgileSHIFT team should give a chance to stakeholders to comprehend the progress it has made during the iteration and so far during the work.

This transparency is given through the value demo meeting. The objective of the value demo is to:

- Explain what has been attained over the last iteration, involving any demonstration of outputs, functionality, or value delivered.
- Learn from the customer whether the last delivery was in line with their expectations when utilised.
- Learn from all the stakeholders whether there has been any change in context or priorities inside or outside the organisation related to the work.
- Refine items in the task list and prepare for the next iteration planning meeting.

The suggested duration is up to one hour per week of iteration. Attendees involve the AgileSHIFT team, the AgileSHIFT coach, the AgileSHIFT sponsor, and any interested stakeholders invited by the sponsor.

This is a vital opportunity for the team to communicate directly with those who will engage with, and benefit from, the work done.

At the end of every iteration, the AgileSHIFT sponsor will make the ultimate decision regarding whether to endorse the release of any deliverables, work outputs, or changes, and invest in the next iteration. This will occur at the end of the value demo.

AgileSHIFT Iteration Retrospective

Following directly from the value demo, the focus of discussion moves by the iteration retrospective from the value which is given to the way the AgileSHIFT team worked together, the processes which are utilised by them, and what worked properly or could be enhanced.

The AgileSHIFT team, AgileSHIFT sponsor, and AgileSHIFT coach attend this meeting as team performance will be analysed.

The iteration retrospective meeting can be hard because team members are anticipated to be open and honest about the performance of their own and colleagues during the iteration.

The AgileSHIFT coach should train the team members to evade personal comments and focus on constructive feedback and progress.

During the iteration retrospective, answers to the following questions should be agreed and recorded:

How well did the processes and tools we utilised perform?

How did the team perform?

Should changes be made to the processes or team?

What actions should be taken during the next iteration or after the work is complete?

Cancelling an Iteration

An iteration should only be cancelled if:

- The AgileSHIFT team no longer believe that they can deliver the iteration goal, or;
- A change in the context means goal will no longer add value to the customer or the organisation.

Only the AgileSHIFT sponsor has the authority to cancel the iteration. The business decision will be made after consulting with the broader organisation, customers, and other stakeholders.

In some situations, the decision to cancel an iteration may be a hard one both professionally and personally, but if it is the accurate decision then justification may be found by referring back to the AgileSHIFT principle of embracing change and having the willingness to fail positively.

Definition of Tools and Techniques

Customer Story

A natural language and informal description of one or more features of a piece of work.

Customer stories are usually written from the viewpoint of an end-user or ultimate customer to better comprehend the requirements.

Epic

A high-level definition of the need that has not yet been adequately refined or understood.

Ultimately, an epic will be refined and broken down into many requirements and customer stories.

Relative Estimating

An abstract estimating technique which encourages the teams to consider the 'size' of a task, utilising only other tasks as a reference point.

Task List

A simple list of customer epics and user stories that will be the source of any work undertaken.

Road Map

A high-level view of the general direction of the work being undertaken. It will involve expected delivery dates.

Swarm

The everyone's practice in the team collectively working on a single task until it is finished, before they move on to tackle other tasks.

Kanban Board

A board that visually represents the work in an iteration or task list. It is generally made up of a series of rows and/or columns where work items move from left to right as they proceed through several states to be completed.

Multiple Choice Question 3:

1. Every AgileSHIFT iteration is triggered by a go decision from the _____.
 - a. AgileSHIFT Coach
 - b. AgileSHIFT sponsor
 - c. AgileSHIFT team
 - d. None of these

2. An abstract estimating technique which encourages the teams to consider the 'size' of a task, utilising only other tasks as a reference point is referred to as _____.
 - a. Road Map
 - b. Absolute Estimating
 - c. Task list
 - d. Relative Estimating

3. _____ are usually written from the viewpoint of an end-user or ultimate customer to better comprehend the requirements.
 - a. Customer requirements
 - b. Customer stories
 - c. Roadmaps
 - d. None of these

4. Who is responsible for identifying opportunities to improve processes, teams, themes, and ways of working?
 - a. AgileSHIFT Coach
 - b. AgileSHIFT Sponsor
 - c. AgileSHIFT Executive
 - d. AgileSHIFT Mentor

5. What term does AgileSHIFT define as 'the practice of everyone in the team collectively working on a single task until it is complete'?
- Roadmap
 - Swarm
 - Timebox
 - Iteration
6. During _____, we get ready to begin the work by developing a vision statement.
- Trigger
 - Start-up
 - Iteration planning
 - Go/No Go Decision
7. The main purpose of _____ is for the team members to synchronise and coordinate their work with the rest of the team.
- Roadmap
 - Swarm
 - Timebox
 - Daily stand-up
8. Which among the following is not an activity out of the four core activities in an iteration?
- Plan
 - Do
 - Act
 - Listen
9. Is the following statement true or false?
The main aim of the vision statement is to assure that everyone in the organisation is moving in the same direction.
- True
 - False

10. Which AgileSHIFT practice advises that cross-functional teams that span across silos are important to effective value creation?
- a. Deliver iteratively and incrementally
 - b. Measure value
 - c. Plan to be flexible and adaptable
 - d. Build collaborative teams