



# The Agile Evolution, it's more than process.

## Introduction

*In February of 2001, 17 technicians got together at Snowbird Ski resort in Utah to discuss a new way of working. The outcome of that meeting was the now-famous Agile Manifesto (<http://agilemanifesto.org/>). Within a few short years, the innovative ideas, values, principles, and methods resulting from that meeting have revolutionized information technology.*

*You will often hear these fathers of the Agile software development movement say that this revolution has gone far beyond their wildest imaginations. But, to say it has simply revolutionized the IT/IS industry would be a complete understatement, for in 2018, the Agile industry finds itself becoming relevant in every part of major organizations. And, it is being taught in schools and even being used in personal workflow management (such as in the case of personal Kanban).*

*As one of the greatest stories of our time, it is fascinating and curious how something that was once looked at as the “hippy feel-gooders’ manifesto” has become not only mainstream, but maybe even world changing. In this article, we are going to explore a couple of ideas about why this happened and what might be the roots of its success and acceptance.*

Many people in IT and IS are very aware of the Agile process of Scrum, XP, Kanban and many others. In the early years of Agile we were very focused on transforming teams and, potentially, organizations in order for them to use one of these processes or methods. We, as Agile coaches and transformers, focused our efforts to the education and adherence of those processes. But, as we gained momentum, something very curious quickly happened; we noticed that some teams and organizations would reach astonishing levels of success with the transformation, while others actually became worse than they ever were before. We all began to wonder what was happening!

We sensed that there was something missing in some teams and organizations. And, we, as coaches, began to coin the term: Agile Mindset (Table 1 in red). We had a vague idea of what that was, but we were so new to this idea, that most of what we saw were surface symptoms and our responses were focused on those surface symptoms instead of the underlying root-causes.

About 10 years ago, the industry began to learn more about this, and the Agile industry began to coin the phrase: “Doing Agile versus Being Agile.” The first time we heard this was from Lyssa Adkins in her book *Coaching Agile*

Traditional Mindset	Agile Mindset
Stability is the norm	Chaos is the norm
The world is linear, and predictable	Uncertainty reigns
Do agile	Be agile
It's controllable	Murphy's law rules
Minimize change	Welcome change

Strive for efficiency	Strive for effectiveness
Deliver on the planned result	Discover the desired result
Planning drives results	Results drive planning
Aim, fire	Fire; redirect the bullet
Establish procedures and policies	Agree on guidelines, principles and values
Control the process	Keep flexible and adaptive
Correct to the baseline	Correct to what's possible
Be a task master	Be a relationship manager
Get it right the first time	Get it right the last time

Tables 1 and 2 adapted from Doug DeCarlo *eXtreme Project Management*.

Teams.

Interestingly, it became very clear that most coaches were very focused in the early years on the “doing” part of Agile. And, some teams were just naturally able to shift to “being Agile.” It was those teams that naturally shifted to “being Agile” that began to have astonishing results.

What has become very apparent is that while the processes are simple, they are very hard to implement successfully. Many of us in Agile coaching recognized that there was a big chasm between “doing Agile” and “being Agile.” Doug DeCarlo helped us understand this with Tables 1 and 2 from his book *eXtreme Project Management*.

At the core of the Agile Mindset are the shorter feedback loops where we can adjust our behaviors and focus based on the team’s empirical results and changes in the marketplace. Instead of attempting to plan everything out to the minutest detail and trying to maintain the perfect schedule, we recognize and embrace the chaos that is software development. Instead of waiting until the end of the project to change our misbehavior, we adjust early and often. Instead of making the scope change process painful, we work from a prioritized list of requirements with the goal of maximizing the rate at which we deliver value to our consumers.

Over the last few years, we have validated these ideas, yet there seems to be a truly big problem in the realization of the significant difference between “doing Agile” and “being Agile.” Many of us simply could not clearly define what “being Agile” is really about. What do we mean when we talk about the Agile Mindset? Over the last seven years, we (the authors) have been on a quest to answer that question. The interesting thing is that we quickly realized that we had to go outside and beyond the Agile industry to really gain insight into the idea of the Agile Mindset. Early in this quest we stumbled upon a book by Daniel Goleman titled *A Force for Good: The Dalai Lama’s Vision for Our World*. As we read the book, we became aware of a new curiosity about the inner workings that make us who we are. We began to sense the difference between the inner game and outer game and that it was aligning with the difference between the “being and doing Agile” chasm.

So, we then picked up Daniel Goleman’s book titled: *Emotional Intelligence: Why It Can Matter More Than IQ*. This reading created awareness and realization that we were on to something; the picture of this mindset concept was beginning to form and become much clearer to us.

Emotional Intelligence (EQ) is a set of emotional and social skills that influence the way we perceive and express ourselves, develop and maintain social relationships, cope with challenges, and use emotional information in an effective and meaningful way. It is a set of balanced skills of self-awareness, self-expression, interpersonal relationships, decision-making, and stress tolerance. This made us aware that there was an outer game and an inner game that make up who we are. We felt that we had made a great discovery; well, at least in our minds.

The discovery! No matter how smart people are their success is still governed by how well they can communicate their ideas and interact within their relationships. Viola! The first value in the manifesto came to clarity: “Individuals and interactions over processes and tools.” The connection was made! This truly hit home for us as the core of the so-called Agile Mindset. Much of our coaching was focused on the outer game, our skills, knowledge, experience, and capabilities. The Agile Mindset is much more aligned with our inner game, which consists of intent, integrity, trust, honesty, transparency,



Figure 1. EQ 2.0 Model.

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courageous authenticity, and empathy.

The Multi-Health Systems Inc. (MHS - <https://www.mhs.com/MHS-Talent?prodname=eq2>) (Figure 1) EQ 2.0 model that we use begins with the composite of self-perception. This is all about the journey you are on in life, and having a clear understanding of the destination. Self-perception is the ability to know one's self regarding your values, goals, desires, concerns and, most importantly, what motivates and demotivates you leading to a happy and productive life, whether personal or at work. Knowing one's self opens the prospect to express one's self in an honest and authentic way using just the right amount of independence and assertiveness.

This leads to the ability to interact with others in a positive and productive manner, allowing you to connect without the clutter of self, being empathetic and aware of your social responsibility to others and the world around you. This leads to the ability to make better decisions, controlling your reactions and impulses with truth and understanding of what is really going on in every interaction, and heightens your ability to clearly see the problem; opening constructive possibilities to solve all problems in a way that does not destroy your relationships. All of this results in better stress management. We become more flexible and tend to interpret events in a positive way.

Once you become aware of, and begin to improve, your entire EQ spectrum, you will find yourself more productive and happier with your internal and external self. Both at work and at home, the EQ 2.0 model calls for overall well-being. This general well-being will make you a much better teammate at work, family member at home, and assist in

every social interaction, even in the tough situations. Consider for a moment a team full of emotionally intelligent members. Can you begin to imagine how resilient to change and conflict that this team could be?

This discovery of the inner-self allowed us to begin to mature our conversations about the Agile Mindset and led us to many more innovative ideas. One of the more important ideas came to us from Frederic Laloux when he released his book entitled *Reinventing Organizations: A Guide to Creating Organizations Inspired by the Next Stage of Human Consciousness*. In this book, he takes us on a journey of understanding the different organizational evolutions and how they match up to the social human evolutionary stages. These stages are given color codes: red, amber, orange, green and teal. (Table 3)

Be careful when trying to place an organization, or its employees, in a particular stage. It has been discovered that we can see various stages show up in individuals and organizations given different circumstances.

Red organizations can be described like a wolf pack; there is always an alpha leader, and only through violence can the alpha leader be overthrown or removed. Currently, recognizable examples of red organizations are the mafia, street gangs, and militias. The key breakthrough in the evolutionary cycle for red was the division of labor and command authority – it was through this evolution that great projects such as the pyramids, cathedrals and many of the world wonders were built.

Around the time of the industrial age, conforming amber organizations began to come into power. Their guiding metaphor is “the army,” with examples of the Catholic Church, with the pope at the top, cardinals, then archbishops to bishops, then priests. The pyramid and hierarchy are clearly defined. But, you will notice the absolute power in red is now slightly distributed through proxy from the leader in this evolution. The key breakthroughs were the introduction of repeatable processes and formal roles and titles in the workplace.

The information age brought yet another evolution described as achievement-Orange. In these organizations we find what is described as a machine, truly results-oriented and repeatable. Laloux described it as a

Table 3. Adapted from Frederick Laloux' s book *Reinventing Organizations: A Guide to Creating Organizations Inspired by the Next Stage of Human Consciousness*

Stage	Examples	Key Breakthroughs	Guiding Metaphor
Red	<ul style="list-style-type: none"> <li>• Mafia</li> <li>• Street gangs</li> <li>• Tribal militias</li> </ul>	<ul style="list-style-type: none"> <li>• Division of Labor</li> <li>• Command authority</li> </ul>	Wolf Pack
Amber	<ul style="list-style-type: none"> <li>• Catholic church</li> <li>• Military</li> <li>• Most government agencies</li> <li>• Public school systems</li> </ul>	<ul style="list-style-type: none"> <li>• Formal Roles</li> <li>• Processes</li> </ul>	Army
Orange	<ul style="list-style-type: none"> <li>• Multinational companies</li> <li>• Charter schools</li> </ul>	<ul style="list-style-type: none"> <li>• Innovation</li> <li>• Accountability</li> <li>• Meritocracy</li> </ul>	Machine
Green	<ul style="list-style-type: none"> <li>• Culture driven organizations</li> <li>• Southwest Airlines</li> </ul>	<ul style="list-style-type: none"> <li>• Empowerment</li> <li>• Values Driven culture</li> <li>• Stakeholder model</li> </ul>	Family
Teal	<ul style="list-style-type: none"> <li>• Made up of self-managing teams</li> <li>• No/limited HR dept.</li> </ul>	<ul style="list-style-type: none"> <li>• Self-Management</li> <li>• Wholeness</li> <li>• Evolutionary Purpose</li> </ul>	living organism or living system



predict, track and control model. Many of our Fortune 500 companies today are perfect examples of this evolution. Key breakthroughs include innovation, accountability, and meritocracy.

As we now are clearly moving out of the information age into what many are calling the knowledge-innovation age, we find our organizations beginning to evolve again. In this case, we see more and more companies like Southwest Airlines becoming pluralistic Green. The guiding metaphor is the word “family” and these companies are driven by their culture, not their process. Key breakthroughs at this level are empowerment, values-driven culture, and the stakeholder model. A great example of this organization is the CEO describing his company as a village and all the employees are citizens of the village with equal rights, and he is simply the mayor of the village.

Finally, we have evolutionary Teal. It is the top of the scale that we will discuss. There are others, but we will stop with teal, because it is where our concrete evidence of these types of organizations truly exists and ends. It is considered the achievement of Maslow’s self-actualization level. Teal organizations strive for wholeness and community, support people’s longing to fully be themselves at work, and are deeply involved in nourishing relationships.

The founders of teal organizations use a different metaphor for the workplaces they aspire to create. With surprising frequency, they talk about their organization as a living organism or living system.

Key breakthroughs for teal organizations are self-management, wholeness, and evolutionary purpose.

- **Self-management:** Teal organizations have found the key to operating effectively, even at a large scale, with a system based on peer relationships, without the need for either hierarchy or consensus.
- **Wholeness:** Organizations have always been places that encourage people to show up with a narrow “professional” self and to check other parts of the self at the door. They often require us to show a masculine resolve, to display determination and strength,

and to hide doubts and vulnerability. Rationality rules as king, while the emotional, intuitive, and spiritual parts of us often feel unwelcome, out of place. Teal organizations have developed a consistent set of practices that invite us to reclaim our inner wholeness and bring all of who we are to work.

- **Evolutionary Purposes:** Teal organizations seem to have a life and a sense of direction of their own. Instead of trying to predict, monitor, and control the future, these organizations seem to invite their entire membership to sense and respond to what the organization will be and what purpose it wants to serve. Can you define your organization’s culture? How about your own thinking? Can you imagine the power of understanding this, to create true understanding of the journey to an Agile organization? A teal organization?

As we came to more understanding of these ideas, it was apparent that Agile is not really the flu, but just a symptom of the flu, if you will. Human social and organizational evolution is moving beyond the information age and entering a new age (some call it the knowledge age). In this new age, the workplace will be filled with new generational people from the Millennial and the Generation Z groups. These new workers will not be ruled by the meritocracy-based systems of the past; relationships and human experience are more important than ever.

I often hear the phrase “waterfall is dead, long live Agile!” We have come to think of this a bit differently, and would like to share a new idea: “Predict, Command and Control is dead, long live ever-increasing change based on interpersonal relationships!” As a call to action, we invite you to begin your own exploration of the true meaning of the Agile Manifesto to our new world. Maybe it isn’t even what the authors intended it to be, but as it is with human nature, we have begun to form it and change it to be our own. My guess is that the authors would be encouraged by this simple fact that they no longer singularly own this amazing collection of world-changing words; it belongs to us, and it is up to us to realize its eventual impact on ourselves and the world around us.

## About the Authors

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