SolutionsIQ: an Agile company
A personal account of Agile transformation
SolutionsIQ: an Agile company

A personal account of Agile transformation
Origin

Charlie

John

What is this Agile transformation thing?
1979: SolutionsIQ founded as a regional staffing company
2002: Charlie joins SolutionsIQ
2004: SolutionsIQ begins using Scrum and XP
2006: Charlie and John buy SolutionsIQ and focus on Agile
2009: Restructure for survival—Agile only service to grow
2010: Scaling Agile 1.0, LeanOps, building an Agile consultancy
2011: SolutionsIQ hits the Agile tipping point
2012: Building a national practice
2013: SolutionsIQ 2.0
2014: SolutionsIQ 3.0
Ivory Tower
What is this *Agile transformation* thing?
What is Agile leadership?
What is an Agile enterprise?
What is corporate culture?
The Well-Oiled Machine
The Man-Machine conflict runs deep.
And it isn't, by any means, a new concept...
Traditional Management Culture
Human Ecology
Culture Clash

The Well-Oiled Machine ≠ Human Ecology
Choose the best solution
Do it "right" the first time
Centralize control
Reduce variance
Fungible labor
Optimize production

Learn as you go
Incremental progress
Empower teams
Cultivate differences
Self-actualization
Optimize learning
Clashing principles don't easily coexist.
Culture Clash

The Well-Oiled Machine
- Choose the best solution
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≠

Human Ecology
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What is corporate culture?
Getting Ready for the Journey

Guiding Principles

Take a Page Out of Nature's Playbook

Taking Some Pages From The Agile Playbook

Mental Preparations
Guiding Principles
Take a Page Out of Nature's Playbook
Fractal Patterns

Brain Cell

Universe
Simple Rules
Taking Some Pages From

The Agile Playbook
Backlogs
Pairing
Stretching...

...the Team Pattern
Deconstructing the Manifesto

Manifesto for Agile Software Development

We are uncovering better ways of developing software by doing it and helping others do it. Through this work we have come to value:

Individuals and interactions over processes and tools
Working software over comprehensive documentation
Customer collaboration over contract negotiation
Responding to change over following a plan

That is, while there is value in the items on the right, we value the items on the left more.
Mental Preparations
The Agile journey begins...
Bump #1
Getting stuff done
Respond over Perfect

- Shorten the time between idea and action
- Deliver frequently
- Stay connected
• Shorten the time between idea and action
• Deliver frequently
• Stay connected
(MRKT-1633) Redmond CSM
July 23-24 (Post-Course)
Description: As an attendee, I want to receive my Scrum Alliance credentials and instructions for certification so that I can become certified ASAP.

AC:
- Verify course attendees
- Upload attendees to Scrum Alliance and submit payment
- Send pre-course email

Themes: Public Training
Release: 2014 Q3 (Team_Program)
Team: Best Served Chilled

( MRKT-1643 ) Explore LearningTree Relationship
Description: As a training business, we need to decide if we want to partner with LearningTree to provide additional training classes or venues.

AC:
- Review website
- Set up call, appropriate
- Determine next steps

Themes: Public Training
Release: 2014 Q3 (Team_Program)
Team: Best Served Chilled

( MRKT-1624 ) Portland CSM
July 22-23 (Pre-Course)
Description: As a trainer, I want to ensure that class details are confirmed so that SolutionsIO appears capable in front of customers and we'll gain more business.

AC:
- Confirm final headcount
- Inform venue of dietary needs
- Confirm venue receipt of supplies/booklets
- Send trainer intro
- Send pre-course logistics

Themes: Public Training
Release: 2014 Q3 (Team_Program)
Team: Best Served Chilled
Lean Service Rollout
Using the Lean Canvas

Service Definition

Market Test

Market Launch

[Diagram showing the flow of service definition, market test, and market launch processes]
Service Definition

1. Idea
2. Complete Service Definition Canvas
3. Ready to Market Test?
   - NO
   - YES
   - Service Canvas
<table>
<thead>
<tr>
<th>Problem</th>
<th>Solution</th>
<th>Value Proposition</th>
<th>Positioning</th>
<th>Customer</th>
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<tbody>
<tr>
<td>Key people</td>
<td>Key activities</td>
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<td>Channel partners</td>
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<tr>
<td>Cost structure</td>
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<td>Revenue streams</td>
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</tbody>
</table>

**Lean Canvas**
Market Test

- Service Canvas
- Prepare and Execute Market Test
  - Market Test Again?
    - YES: Service Canvas
    - NO: Market Launch?
      - YES: Service Definition 1.0
      - NO: End

Market Launch

Service Definition 1.0

Soft Launch

Key to Market Strategy?

YES

Full Launch

Hold Quarterly Market Review

YES

Do More Marketing?

NO

End

NO

End
Lean Service Rollout Using the Lean Canvas
Bump #2
Changing leadership style
Invite
over
Dictate

- Extend invitation to realize a shared vision
- Grow open networks of diverse voices
- Increase transparency
- Extend invitation to realize a shared vision
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Professional Development - Program Charter

VISION
We believe that continuous learning is integral to our success and agree to share the responsibility and passion for learning.

» As a company, we will make clear what skills and knowledge we need for success in the marketplace.
» As a company, we will provide the resources and support needed by individuals to learn and share what they have learned.
» As a community, we agree to help our colleagues learn and to learn from our colleagues.
» As individual professionals, we agree to take personal responsibility to learn and share what we have learned.
» When feasible we choose to learn together.

The more that we as individual professionals increase our knowledge, skills and cross-functional capabilities, the more we as a company can adapt and scale in a rapidly changing marketplace.

GUIDING PRINCIPLES
The company will allocate an annual fund for professional development.

» All FTEs within the consulting and development organizations who have been with SQ for 6 months or longer are eligible to share this fund. Eligibility date is based off original hire date (not FTE conversion date).
» All participants have an equal opportunity for development.
» Information on program funding and employee participation will be made available to all participants.
» Ask for help! Your peers have a shared stake in your learning and will have valuable advice about which events would be beneficial to you and the community.
» Program recipients will share learning within the SolutionsIQ community.
» When possible, we will leverage professional development “economies of scale.” (For example, instead of 15 people going to a seminar, bring the seminar to SolutionsIQ.)

PROGRAM STRUCTURE AND CONTENT

1. Funding
   a. Each eligible employee has a “use it or lose it” budget within a given calendar year. For 2014 the budget is $X.
   b. Your development budget covers related travel expenses.
   c. You are expected to cover your spending beyond the budgeted amount.

2. Documenting your activity
   a. There is a common spreadsheet in Box (Professional Development Tracking) where all participants track personal development budget selections and expenditures.

3. Choosing development activities
   a. Discuss your professional development goals with your SolutionsIQ colleagues.
   b. The information in the Professional Services Tracking spreadsheet will provide you with insights about valuable development activities.

4. Sharing what you learned
   Extend the benefits of the program by sharing learning with the community. There are many ways this can be done—including these examples:
   a. Offer a lunch and learn session
   b. Write a blog entry
   c. Host an open space gathering session
   d. Create a short video
   e. Write and post an informative Yelp™-style review to Box
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Bump #3
Giving up control
Enable over Control

- Empower teams
- Increase space for learning
- Remove barriers to individual creativity
• Empower teams
• Increase space for learning
• Remove barriers to individual creativity
Joint IP Ownership
Bump #4
Learning how to learn
Learning

over

Knowing

- Increase options
- Accelerate the learning cycle
- Learn by experimenting
• Increase options
• Accelerate the learning cycle
• Learn by experimenting
Respond over Perfect
- Shorten the time between idea and action
- Deliver frequently
- Stay connected

Enable over Control
- Empower teams
- Increase space for learning
- Remove barriers to individual creativity

Invite over Dictate
- Extend invitation to realize a shared vision
- Grow open networks of diverse voices
- Increase transparency

Learn over Know
- Increase options
- Accelerate the learning cycle
- Learn by experimenting
Human Nature

3 factors lead to better performance & personal satisfaction...

Dan Pink Drive

Autonomy Mastery Purpose
What's on the horizon?
When does this Agile journey end?

- SolutionsIQ 2.0
- SolutionsIQ 3.0
- Quarterly corporate roadmapping sessions
<table>
<thead>
<tr>
<th></th>
<th>Backlog</th>
<th>July</th>
<th>August</th>
<th>September</th>
<th>Done 2014</th>
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<tbody>
<tr>
<td><strong>Business Operations</strong></td>
<td>Implement personal statements</td>
<td>Consultant orientation</td>
<td>Educate community on IT support and services</td>
<td>Replace the employee review</td>
<td>Reduce the personal expense of traveling</td>
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<td></td>
<td>Business Operations reporting</td>
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<td>Improve business infrastructure and services</td>
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<td>Improve SolutionsIQ business model and performance – Q2</td>
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<tr>
<td><strong>Products &amp; Services</strong></td>
<td>Release Continuous Delivery WS</td>
<td>Define Lean service offering program</td>
<td>Service offerings for Agile leadership</td>
<td>Create service roadmap for FY14</td>
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<td>Establish Active Portfolio Management service offering</td>
<td>Launch SAGe training offering</td>
<td>Create an “STC” service offering</td>
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<td>Relaunch Executive Roadmap session</td>
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<td>Release No Bugs! service offering</td>
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<td>Refactor service definition for coaching</td>
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<td>Launch SolutionsIQ Agile at Scale solution</td>
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<td>Exploit Scrum Alliance’s marketing efforts</td>
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<td><strong>Sales, Training, &amp; Marketing</strong></td>
<td>Account Management 2.0</td>
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<td>New website</td>
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<td>Rebrand and refactor sales and marketing templates</td>
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<td>Refactor partner business model</td>
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<td><strong>Communities of Practice</strong></td>
<td>Staying connected to the SolutionsIQ community</td>
<td>Consulting materials, tools, and templates</td>
<td>Define competencies for consulting roles</td>
<td>Creation of Team Origin</td>
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<td>Develop local and regional business</td>
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<td>Traveling stories</td>
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<td><strong>Corporate Vision</strong></td>
<td>Support Communities of Practice</td>
<td>Transition corporate backlog to VersionOne</td>
<td></td>
<td>SolutionsIQ Workflow Process definitions and improvement</td>
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journey
So when does it end?

You know the answer:
If you're an Agile enterprise, the transformation never ends. That's the whole point.
Today

We're here...
Diana Larsen and Esther Derby who, as far as we know, are the first to apply simple rules to management
The SolutionsIQ community, who guide us as we guide them
The rest of the Agile industry, which is at the forefront of a rapidly expanding innovation economy
Everyone here today
Thank You!
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