



Data Driven Change

Why Data Can Be Both Invaluable and Detrimental to Change Initiatives

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About Me

President of **Lean Agile Intelligence**, an organizational change and learning platform that provides guidance to teams and organizations about Agile/Lean practice adoption based on desired business outcomes

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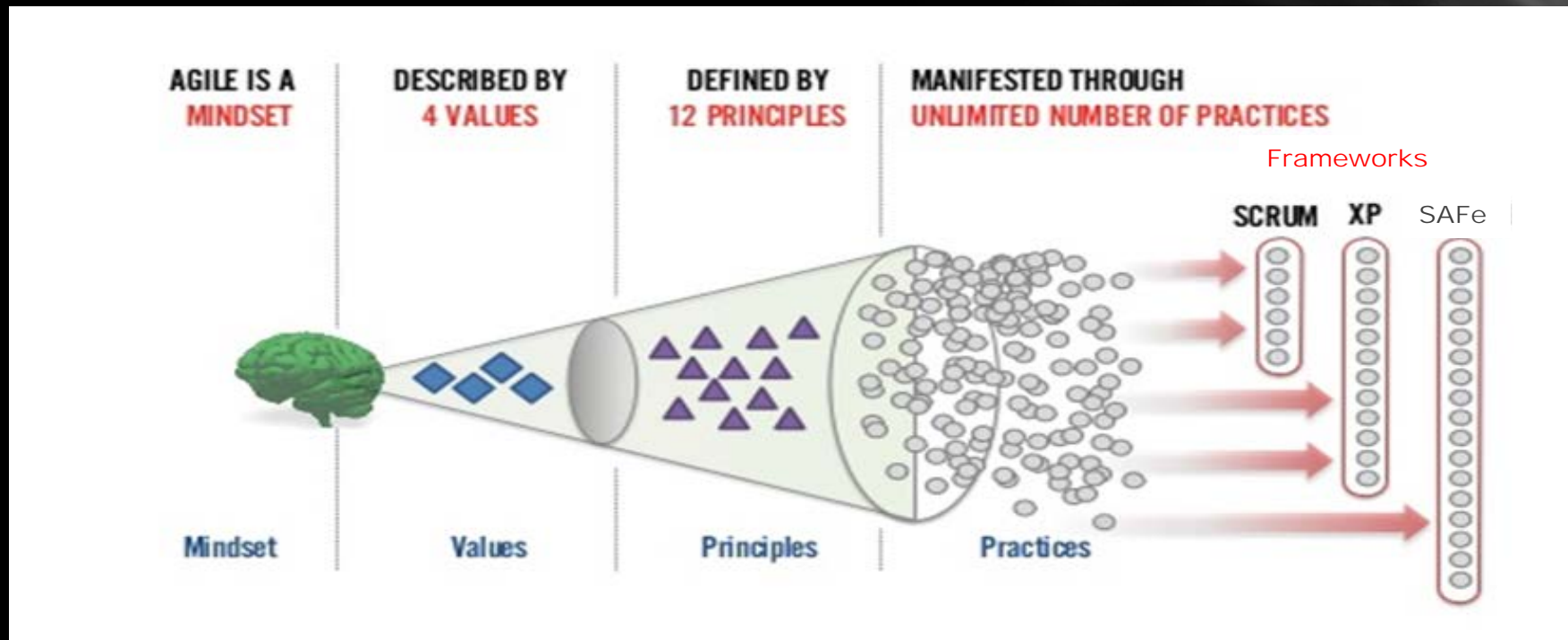


Level Set: Back to the Basics

Shift away from an overloaded and abused term and get back to the true intent of Agile.

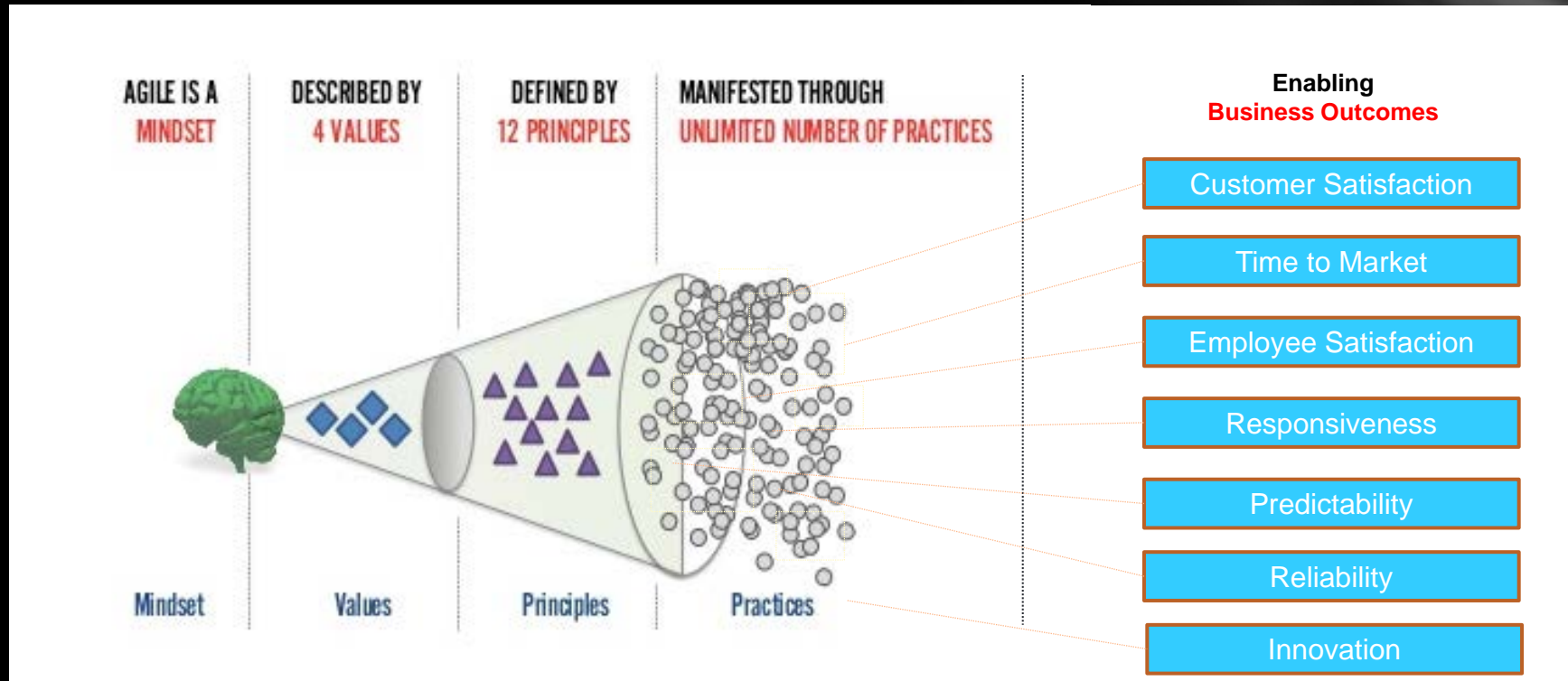


Understanding the Connection





Taking it a Step Further







Mindset

- *People, Teamwork & Relationships*
 - *Working Products & Outcomes*
 - *Customers & Users*
 - *Improvement*
-



Agile Adoption Benefit Timeline

* Agile Adoption Benefits Are Cumulative

Agile Mindset Acquired

Agile Mindset Not Acquired

* Agile Adoption Benefit

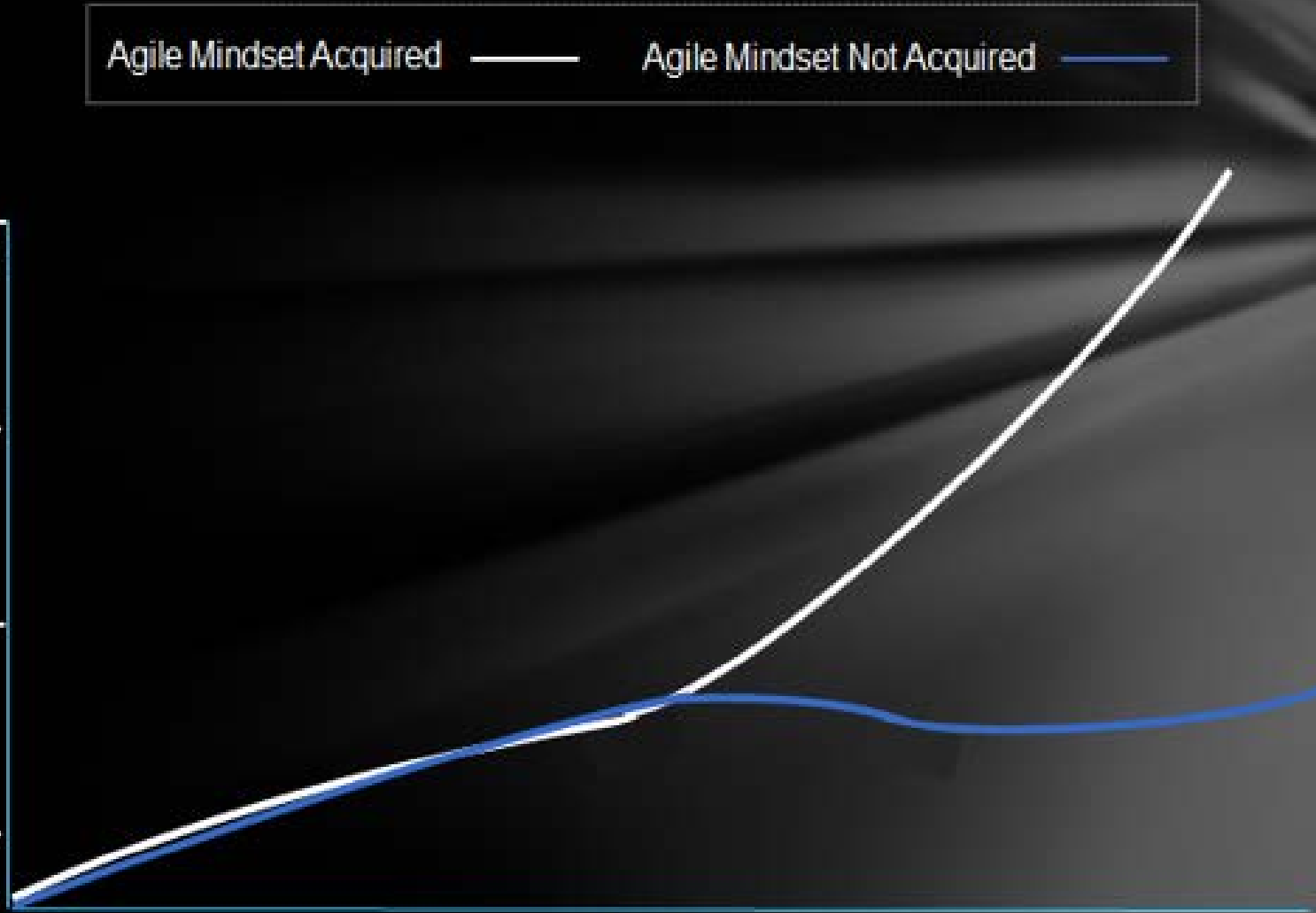
Better Outcomes

Being Agile

Agile Mindset

Doing Agile

Time





What Do I Mean By Data?

For the purposes of this presentation, data is “information” collected from teams that can be used to gather insights about the state of the teams and organization



Feedback Loops in Agile Environments

“A feedback loop occurs when the results of running a process influences how the process itself works in the future”

Source: InfoQ Article by Dan Puckett



Data Collection & Analysis

Just Another Feedback Loop in an Agile Environment

*Powerful because it can be used to quickly identify
patterns that we may not know exist*



Data is a Change Agent's Best Friend

Or is it?

"What is for good, can also be leveraged for evil"



Two Agile Transformations

One Intent

Drive Positive Change by Utilizing Data

Two Different Results



Experience Report

The Failure

Overview

- 1. Large Traditional Banking Organization*
 - 2. Process Oriented Culture*
 - 3. Command & Control Leadership*
 - 4. Early Stages of Adoption*
 - 5. Data Need: Collecting Project Info Across Teams*
-



Experience Report

The Failure

Results of Data Collection & Analysis

- 1. Team Punishments*
- 2. Identify Poor Performers*
- 3. Hold People Accountable for Something They Couldn't Control*

Overall, it fueled anti-patterns of abuse, reprimand, and more process control



But I Learned from the Experience....



Legacy Data Mindset

“We use data to drive behaviors and measure performance”

“It allows us to judge and manipulate people”

Command & Control Leadership



Data Quality & Reliability in a Command & Control Environment

What do you think/seen happens to the “quality” & “reliability” of data collected from teams in an environment of command and control?



Data in a Command and Control Environment is typically...

- 1. Fabricated*
 - 2. Gamed*
 - 3. Manipulated Easily*
 - 4. Hidden*
-



Lack of Safety and Trust

Safety

- Transparency is the norm
- Honesty is necessary
- Constructive criticism is welcomed
- Failure is an option
- Saying “No” is Ok

Trust

- No Fear of reprimand for honesty and transparency
- Our voices are heard and valued
- Confidence that leadership is acting in our best interest



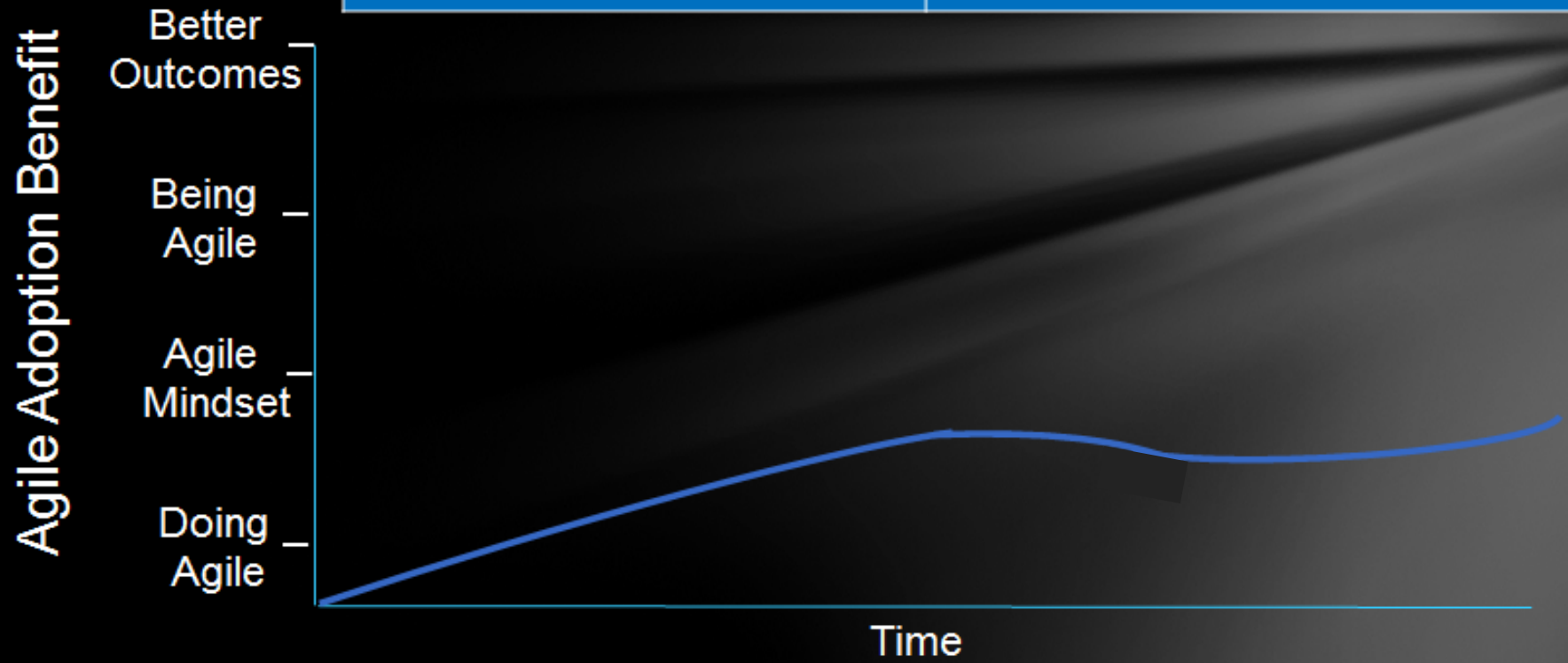
My Conclusion

In organizations where safety and trust do not exist, decisions are made based off of data that does not reflect reality, typically compounding the dysfunction and chaos!

Organization Profile: Agile Mindset Never Acquired

Leadership Approach:	Command/Control
Environment:	Unsafe
Data Use:	Drive Behaviors/Measure Performance
Data Characteristics:	Fabricated & Unreliable
Organization Impact:	More Dysfunction
Change Agent Data Promotion:	Proceed With Caution

* Agile Adoption Benefits Are Cumulative





As Change Agents in Agile Transformation



When It Comes to Using Data to Drive Change



So what should we do if we are in an unsafe environment & we are asked to provide recommendations on data points to collect?

- 1. Stall as long as you can early in the adoption and focus your energies on coaching leadership and teams*
 - 2. At first, stay away from leading indicators such as velocity, & say do ratio*
 - 3. Introduce lagging indicators that challenge leadership to measure the desired outcomes they are looking to achieve with Agility such as NPS for customer satisfaction, feature cycle time for time to market and escaped defects for reliability*
-



*Because once the organization, including leadership
acquires the mindset*

The sky is the limit to drive change

And data becomes your ally



Experience Report

The Success

Overview

- 1. Mid Size Software Organization*
 - 2. Open Minded Entrepreneurial Leadership*
 - 3. People Centric Culture*
 - 4. Latter Stage of Adoption*
 - 5. Data Need: Identifying Coaching Needs and Organizational Constraints*
-



Agile/Lean Data Mindset

“We use data to help us make decisions”

“We use data to help people and the organization achieve goals”

Agile/Servant Leadership



An Environment of Agile Leadership Has Safety and Trust

Safety

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- Honesty is necessary
- Constructive criticism is welcomed
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Trust

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Data in a Agile Leadership Environment is typically...

- 1. Real*
 - 2. Reliable*
 - 3. Actionable*
 - 4. Transparent*
 - 5. A Powerful Feedback Loop*
-



Identifying Coaching Needs and Organizational Constraints

Team Self Assessments

In an environment of Safety and Trust, people will be honest with how they assess themselves



Taking Team Self Assessments to a New Level!

Objective: Align Team Self Assessments With The Organization and Team Desired Outcomes

Understand Organization Strategic Objectives and Vision

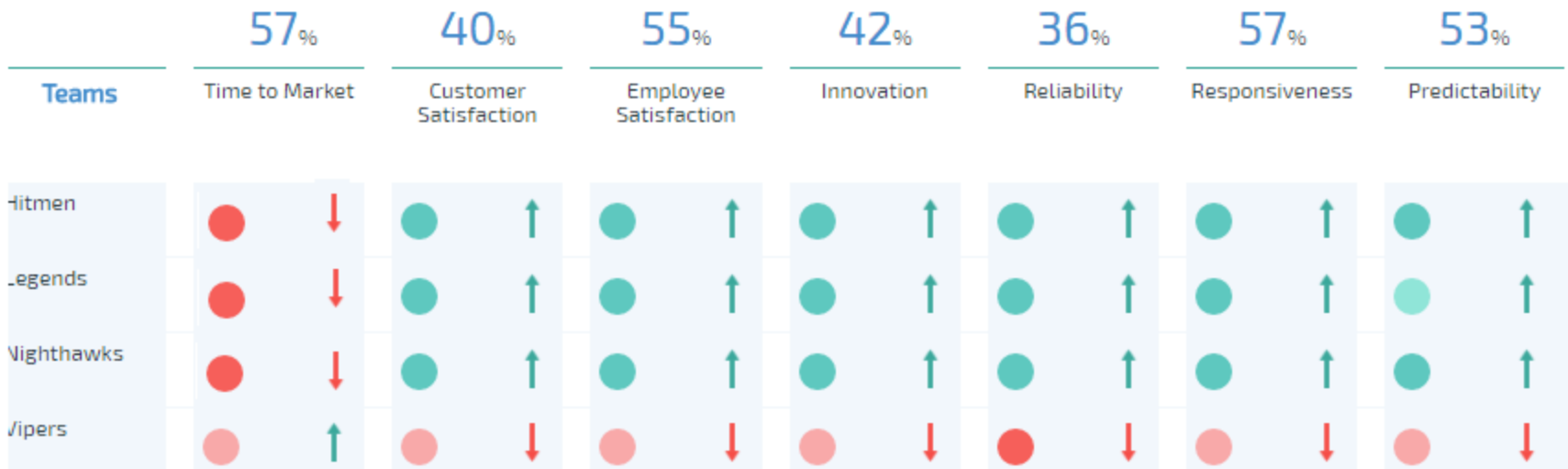
Understand the Team's Goals



Unique Team Self Assessments

Tailored for teams to assess the practices that will help lead to their desired outcomes

Identifying Organizational Constraints





Experience Report

The Success

Results of Data Collection, Analysis & Transparency

- 1. Identify/Prioritize Coaching Needs*
- 2. Surface Organizational Constraint Patterns*
- 3. Identify Continuous Improvement and Investment Opportunities*

Overall, it accelerated our Agile transformation and the delivery of better business outcomes



Organization Profile: Agile Mindset Acquired

Leadership Approach:	Agile (Servant) Leadership
Environment:	Safety & Trust
Data Use:	Make Decisions and Improve
Data Characteristics:	Reliable & Actionable
Organization Impact:	Identify Constraints/Positive Change
Change Agent Data Promotion:	Highly Encouraged

* Agile Adoption Benefits Are Cumulative

*Agile Adoption Benefit

Better Outcomes

Being Agile

Agile Mindset

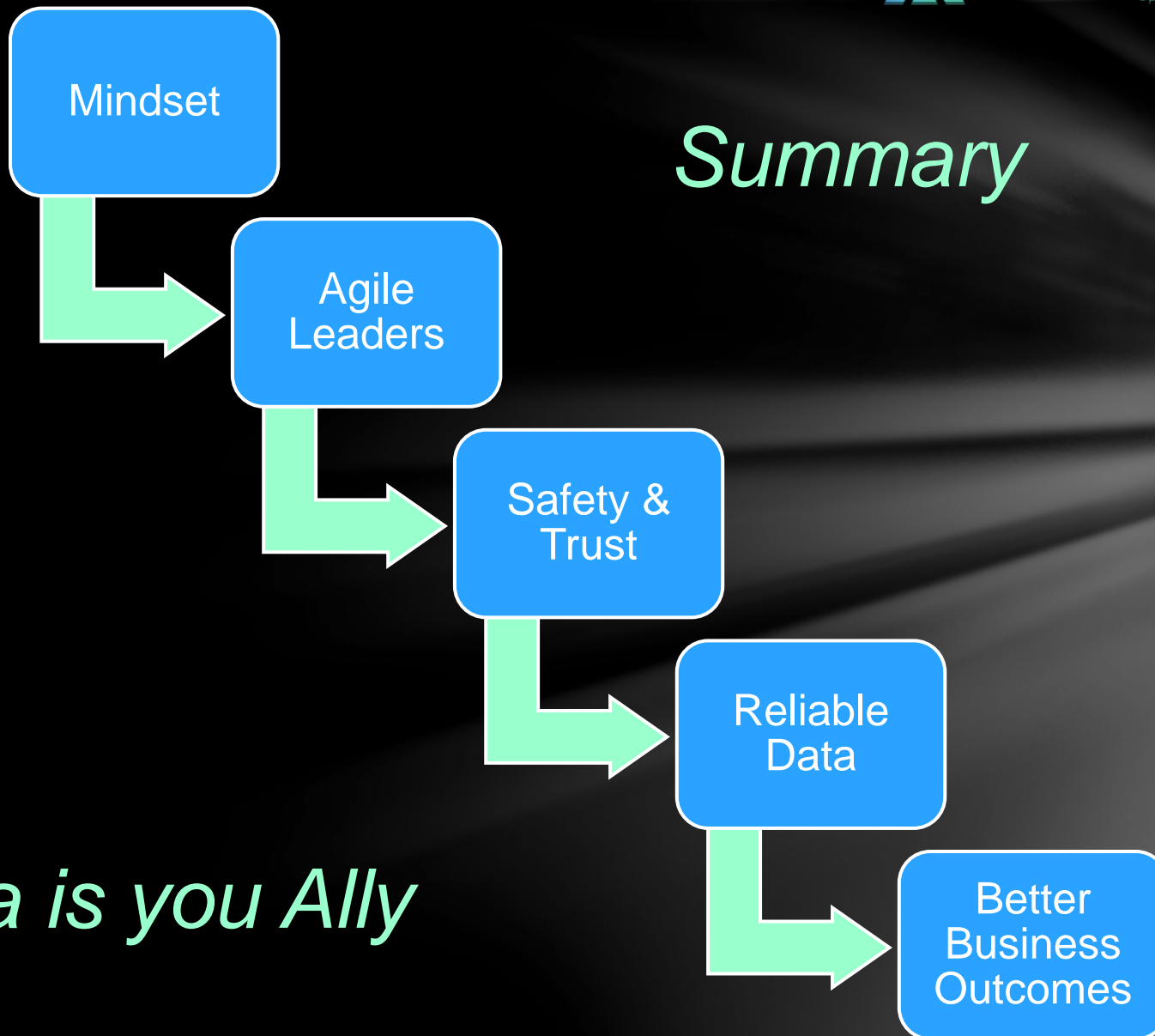
Doing Agile

Time





Summary



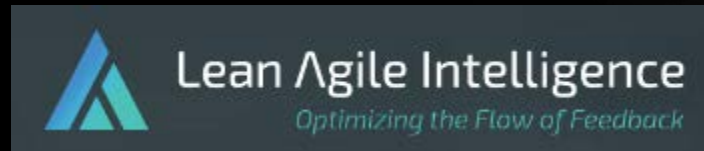
Data is your Ally



Questions



The Self-Assessment Experiment was so successful we made a platform out of it



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