Beyond Whack-a-Mole Coaching
Using Data Analysis to Find High ROI Coaching Opportunities
Beyond Whack-a-Mole Coaching - Using Data Analysis to Find High ROI Coaching Opportunities

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Using Agile maturity surveys to identify opportunities can be helpful when your scope as an Agile Coach is a large organization, but how do you know the lowest scored opportunities will have the most lift? We will share our journey using statistical analysis to uncover high ROI opportunities, highlight some key findings, and how we worked through challenges in communicating this data to different constituents.

INTRODUCTION

As Agile matured to scale, how do you know which ones to target and hundreds of teams at your enterprise versus the ones that might have the most impact? It’s natural to focus Agile coaching and training in a large Tech organization can feel a bit like playing pinball. Scaled Agile Practices, Continuous improvement, and ROI measurement. We used a statistical approach to scoring Agile maturity and the outcomes we really care about are the ones that score themselves highly on the ROI. Agile practitioners score themselves highly on the value to the business, but we are putting the outcomes highly on the value to the business, but we are putting...
Coaching in a large organization... where do you start?
We surveyed over 1,200 technology teams about...

Intent
Planning
Frequent Delivery of Value
Team Health
Scaled Agile
Continuous Improvement
Leadership
Engineering
### Intent
A vision aligns teams to the future state of the product or solution and it includes the customer and stakeholder needs. A backlog is a repository for all work intended for a team or group of teams, it clearly articulates what is needed from the team, and it is continuously refined by them.

This topic does not apply to me. So skip it.

### Which of the following practices are consistently true of your team's product vision and backlog?
- [ ] A comprehensive vision exists
- [ ] Intent and priorities are getting to teams in a timely manner ahead of planning
- [ ] Stories have clear and complete acceptance criteria
- [ ] The backlog is large enough so teams do not run out of work
- [ ] The Product Manager/Product Owner is readily accessible when needed
- [ ] It is clear who is accountable for final prioritization
- [ ] The Product Manager/Product Owner have conversations with the team to clarify & resolve Intent issues
- [ ] Product Managers are able to make decisions in real-time, with a bias toward continuous discovery
- [ ] Customer feedback and insights are used to continuously groom the backlog

### How well does the product vision inspire and align teams in your area?
- 1 Not At All
- 2 Somewhat
- 3 
- 4 
- 5 
- 6 
- 7 
- 8 
- 9 Extremely

### How well does the backlog provide clarity on what the team should deliver?
- 1 Not At All
- 2 Somewhat
- 3 
- 4 
- 5 
- 6 
- 7 
- 8 
- 9

### What is one thing that you can do to help with Intent or what help do you need from leadership? (A short answer in about a sentence)

**Please provide helpful information**

### Please provide insight into what drove your responses on Intent.

**Please provide helpful information**
Survey Timing: From Ad-hoc by request to consistent schedule

Q1
Full Survey
Team Topic Only
Survey
Q2
Q3
Full Survey
Team Topic Only
Survey
Q4
We leveraged Agile Champions across the Tech organization to encourage participation and drive up response rates.
Survey Responses

- Responded: 21%
- No Response: 79%

More than 2,600 associates
Including over 1,400 software engineers!
Highest response rate for the largest LOB = 46%

Time to Complete
20 min
What did we learn?
Example Divisional Results

HIGHEST “AGILE ROI”
- **Improve Delivery of Value**
  - By Focusing On: Planning & Scaled Agile
- **Improve Team Health**
  - By Focusing On: Planning, Continuous Improvement, Leadership

LOWEST SCORES
- Scaled Agile Practices
- Planning

HIGHEST SCORES
- Team
- Continuous Improvement
- Leadership
- Intent

TEAM (using Net Promoter Score)
- 1 in 3 participants would recommend a friend or colleague to work on their team

TOP COMMENT THEMES
- Lack of clarity on Product vision
- Our team rocks!
- Frequent priority changes
Initial Questions we answered:

• **What is a good team size?**
  Our “sweet spot” was between 6 and 11 people

• **What is the impact of Scrum Masters on a team?**
  Teams with professional Scrum Masters were ~15% higher than scores for teams without them

• **How is our morale?**
  Good! Team Health was rated high compared to other topics, including high marks in:
  • Has trust within the team, enabling open and honest interactions (psychological safety)
  • Values differences and works through conflict
  • Is empowered to determine how to deliver
Team NPS Question: “Would you recommend a friend or colleague to work on your team?”
What really matters?

Frequent Delivery of Value with quality
Best People / Teams (Attract & retain top talent)

Greater ability to pivot for internal & external changes

Keep pace with technology

What are the biggest drivers for these outcomes?
What specific practices have the largest impacts on Frequent Delivery of Value?

### Planning Questions (Yes/No)

<table>
<thead>
<tr>
<th>Planning Questions</th>
<th>Coefficients</th>
<th>Standard Error</th>
<th>t Stat</th>
<th>P-value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team's backlog is effectively prioritized, transparent and clear to the team and stakeholders</td>
<td>0.85</td>
<td>0.13</td>
<td>6.77</td>
<td>0.00</td>
</tr>
<tr>
<td>All team members participate and weigh in at planning</td>
<td>0.81</td>
<td>0.14</td>
<td>5.85</td>
<td>0.00</td>
</tr>
<tr>
<td>Team has an agreed to Definition of Done, and uses it to plan and track work</td>
<td>0.78</td>
<td>0.12</td>
<td>6.36</td>
<td>0.00</td>
</tr>
<tr>
<td>Team/Tech Leads provide design guidance at the appropriate time</td>
<td>0.53</td>
<td>0.13</td>
<td>4.22</td>
<td>0.00</td>
</tr>
<tr>
<td>Cross ART/Team dependencies are well laid out during planning</td>
<td>0.51</td>
<td>0.12</td>
<td>4.35</td>
<td>0.00</td>
</tr>
<tr>
<td>Trade-off conversations occur when changing priorities disrupt current forecast/commitments</td>
<td>0.08</td>
<td>0.12</td>
<td>0.67</td>
<td>0.50</td>
</tr>
<tr>
<td>Team decides what they can forecast/commit to</td>
<td>0.08</td>
<td>0.14</td>
<td>0.55</td>
<td>0.58</td>
</tr>
<tr>
<td>Tools available to manage my work are effective (VersionOne, JIRA...)</td>
<td>-0.15</td>
<td>0.13</td>
<td>-1.11</td>
<td>0.27</td>
</tr>
</tbody>
</table>

### Scaled Agile Practices Questions (Yes/No)

<table>
<thead>
<tr>
<th>Scaled Agile Practices Questions</th>
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<th>t Stat</th>
<th>P-value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demos are of a fully functioning product in an integrated environment</td>
<td>0.89</td>
<td>0.12</td>
<td>7.23</td>
<td>0.00</td>
</tr>
<tr>
<td>Team does continuous story grooming and refinement</td>
<td>0.77</td>
<td>0.13</td>
<td>6.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Features have clear and complete acceptance criteria</td>
<td>0.69</td>
<td>0.12</td>
<td>5.67</td>
<td>0.00</td>
</tr>
<tr>
<td>PI / Release Planning enables teams to efficiently create an integrated delivery forecast</td>
<td>0.57</td>
<td>0.12</td>
<td>4.66</td>
<td>0.00</td>
</tr>
<tr>
<td>Architecture provides technical design guidance at the appropriate time</td>
<td>0.28</td>
<td>0.13</td>
<td>2.22</td>
<td>0.03</td>
</tr>
<tr>
<td>Our system team provides adequate support of infrastructure needs</td>
<td>0.25</td>
<td>0.12</td>
<td>2.05</td>
<td>0.04</td>
</tr>
<tr>
<td>UX/UI Designers provide user experience guidance at the appropriate time</td>
<td>0.16</td>
<td>0.13</td>
<td>1.25</td>
<td>0.21</td>
</tr>
<tr>
<td>I am empowered to raise impediments when I am not able to make progress</td>
<td>0.08</td>
<td>0.15</td>
<td>0.54</td>
<td>0.59</td>
</tr>
<tr>
<td>S2 &amp; S3 conversations enable transparency into progress and drive action on impediments</td>
<td>(0.14)</td>
<td>0.12</td>
<td>(1.13)</td>
<td>0.26</td>
</tr>
</tbody>
</table>

Items in Green have higher correlation.
“Agile ROI”: Intent, Planning & Scaled Agile contributes to higher scores on Frequent Delivery of Value

**Intent**
- Stories have Acceptance Criteria
- Team sees Intent & Priorities before Planning
- Product vision exists

**Planning**
- Prioritization
- Team involvement
- Definition of Done
- Identify dependencies

**Frequent Delivery of Value**
- Incremental releases
- Frequent commits
- Vertical slicing

**Team**

**Leadership**
- Scaled Agile
  - Effective PI planning
  - Integrated demos
  - Continuous story grooming
  - Features are clear (ACs)

**Continuous Improvement**
Initial Reaction to “Agile ROI” Approach

- Do the survey recipients know the vernacular well enough?
- Are there assumptions that don’t apply to certain organizations?
- What about things we didn’t ask?
“Agile ROI” In Action - Example:

2x

Has trust within the team, enabling open and honest communications

Psychological Safety

Divisional Focus

Impact over

Works at a sustainable pace, enabling adequate work / life balance

Focus for a few teams
How did we communicate and address opportunities?
Communicating Results & Addressing Opportunities

<table>
<thead>
<tr>
<th><strong>Tech-Wide “CIO” Organization Level</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Presented to Lean Agile Delivery Excellence Group – Portfolio Leads &amp; Enterprise Coaches</td>
</tr>
<tr>
<td>• Presented to Lean Agile CoP - Scrum Masters and Program Leads (RTEs)</td>
</tr>
<tr>
<td>• Published in Tech Newsletter</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>“Divisional CIO” Level</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Utilized mix of lowest scored questions, open comment themes, and their own observations to identify opportunity areas.</td>
</tr>
<tr>
<td>• Some Agile Leads used the Agile ROI learnings to prioritize.</td>
</tr>
<tr>
<td>• Partnered with leadership to action.</td>
</tr>
</tbody>
</table>
## Key Themes

<table>
<thead>
<tr>
<th>Key Themes</th>
<th>Action Plans</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1 - Impact of organizational design choices and the environment they</td>
<td>Divisional leadership are actively working on how we better organize to facilitate flow of work to teams, to help address some of the feedback around</td>
</tr>
<tr>
<td>create for teams</td>
<td>planning capabilities and unlock some of the benefits this could help provide</td>
</tr>
<tr>
<td>#2 - Desire for a more planful than reactive environment for teams</td>
<td>Ensuring roadmaps exist to provide more horizon for teams</td>
</tr>
<tr>
<td>#3 - Need for better clarity about the role of people managers in teams</td>
<td>Working on providing more clarity on the role of managers in teams, at different levels of our delivery system</td>
</tr>
<tr>
<td>#4 - Value of better consistency of language and the structure of how our</td>
<td>Creating a Divisional Delivery Handbook to help with understanding delivery, tips on best practices and bringing AVS to life for anybody who is interested</td>
</tr>
<tr>
<td>teams are set up</td>
<td></td>
</tr>
</tbody>
</table>

**Agile ROI**

Divisional Example
Let’s wrap it up!
What’s next?

• Reduction from 100 questions to 50 questions
• Logic based on team type to reduce questions even more
• Rewrote the remaining questions to eliminate Agile jargon

• Hypothesis Hopper
• Exploring other data sources to merge with
Take-aways:

• The “High Agile ROI” agenda did not become a one-size-fits all agenda for the enterprise, but rather an additional guide post for our Agile Champions

• Invest equally in survey creation and communication strategy

• When communicating
  • Know what is important to them
  • Enrich with other sources of data (job titles, levels, type of team, location, etc)
  • Know your audience: “left-brain” or “right-brain”
Thank you

At Capital One:
• Christine Hales, VP of Delivery Transformation
• Chris Barker, Senior Director of Agile Enablement
• Christina Murto, our colleague and partner in crime
• Simon Noone, Divisional Coach
• Lean Agile Delivery Excellence & the Tech Agility Survey Council

Outside Capital One:
• Rebecca Wirfs-Brock, our Agile Alliance Experience Report Sherpa
We hope this was insightful.

Any Questions?