Lean & Agile
Organizational Leadership

Establishing Vision, Guidance, & Trust to Unleash Enterprise Competitiveness

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Agile Capabilities: http://davidfrico.com/rico-capability-agile.pdf
Agile Cost of Quality: http://www.davidfrico.com/agile-vs-trad-coq.pdf
DevOps Return on Investment (ROI): http://davidfrico.com/rico-devops-roi.pdf
Dave's NEW Leadership Video: http://www.youtube.com/watch?v=70LRzOk9VGY
Dave's NEW Business Agility Video: http://www.youtube.com/watch?v=hTvtsAkL8xU
Dave's NEWER Scaled Agile Framework SAFe 4.5 Video: http://youtu.be/1TAuCRq5a34
Dave's NEWEST Development Operations Security Video: http://youtu.be/X22kJAvx44A
DoD Fighter Jets versus Amazon Web Services: http://davidfrico.com/dod-agile-principles.pdf
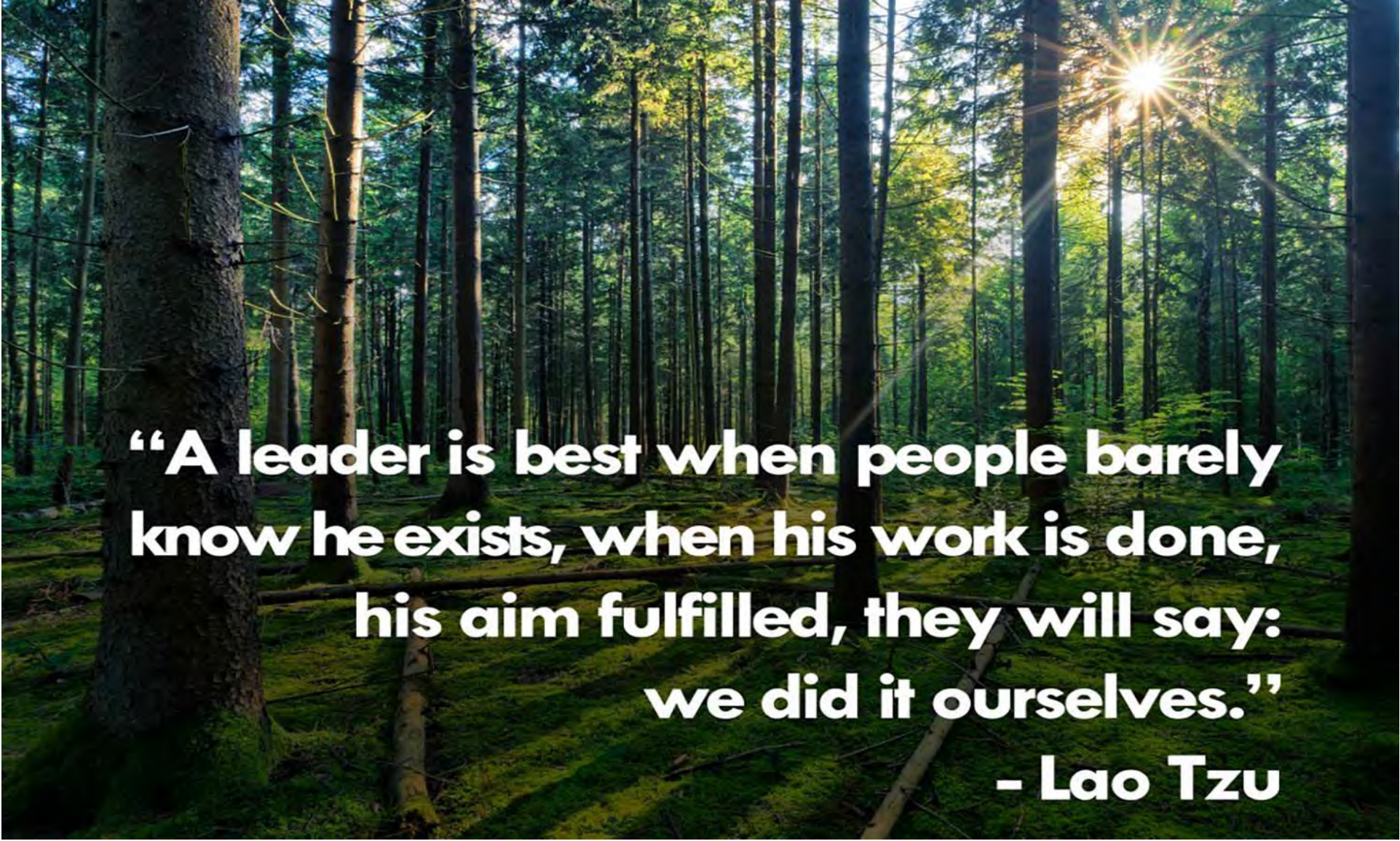
Author Background

- ☐ Gov't contractor with 35+ years of IT experience
- ☐ B.S. Comp. Sci., M.S. Soft. Eng., & D.M. Info. Sys.
- ☞ ☐ Large gov't projects in U.S., Far/Mid-East, & Europe
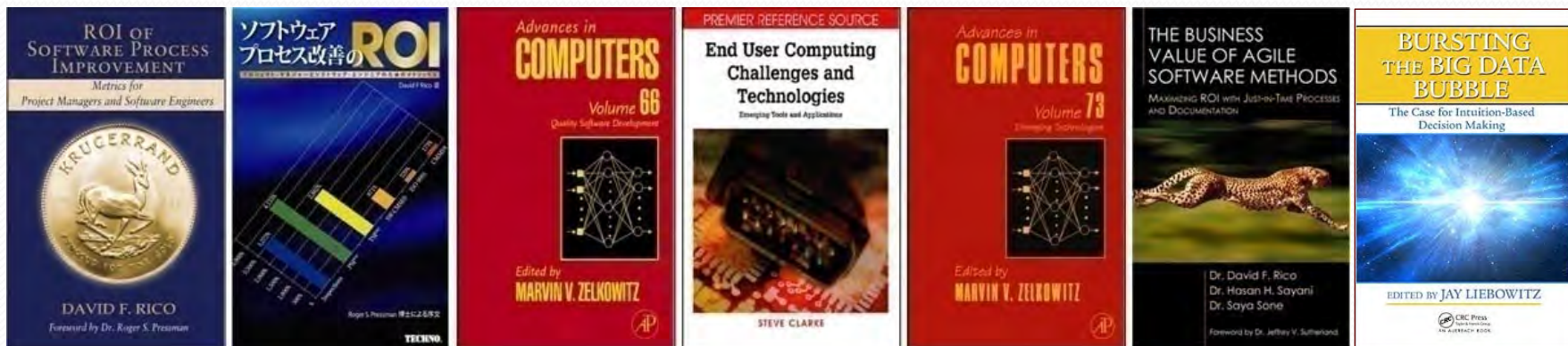
→ *Career systems & software engineering methodologist*
→ *Lean-Agile, Six Sigma, CMMI, ISO 9001, DoD 5000*
→ *NASA, USAF, Navy, Army, DISA, & DARPA projects*
→ *Published seven books & numerous journal articles*
→ *Intn'l keynote speaker, 200+ talks to 14,600 people*
→ *Specializes in metrics, models, & cost engineering*
→ *Cloud Computing, SOA, Web Services, FOSS, etc.*
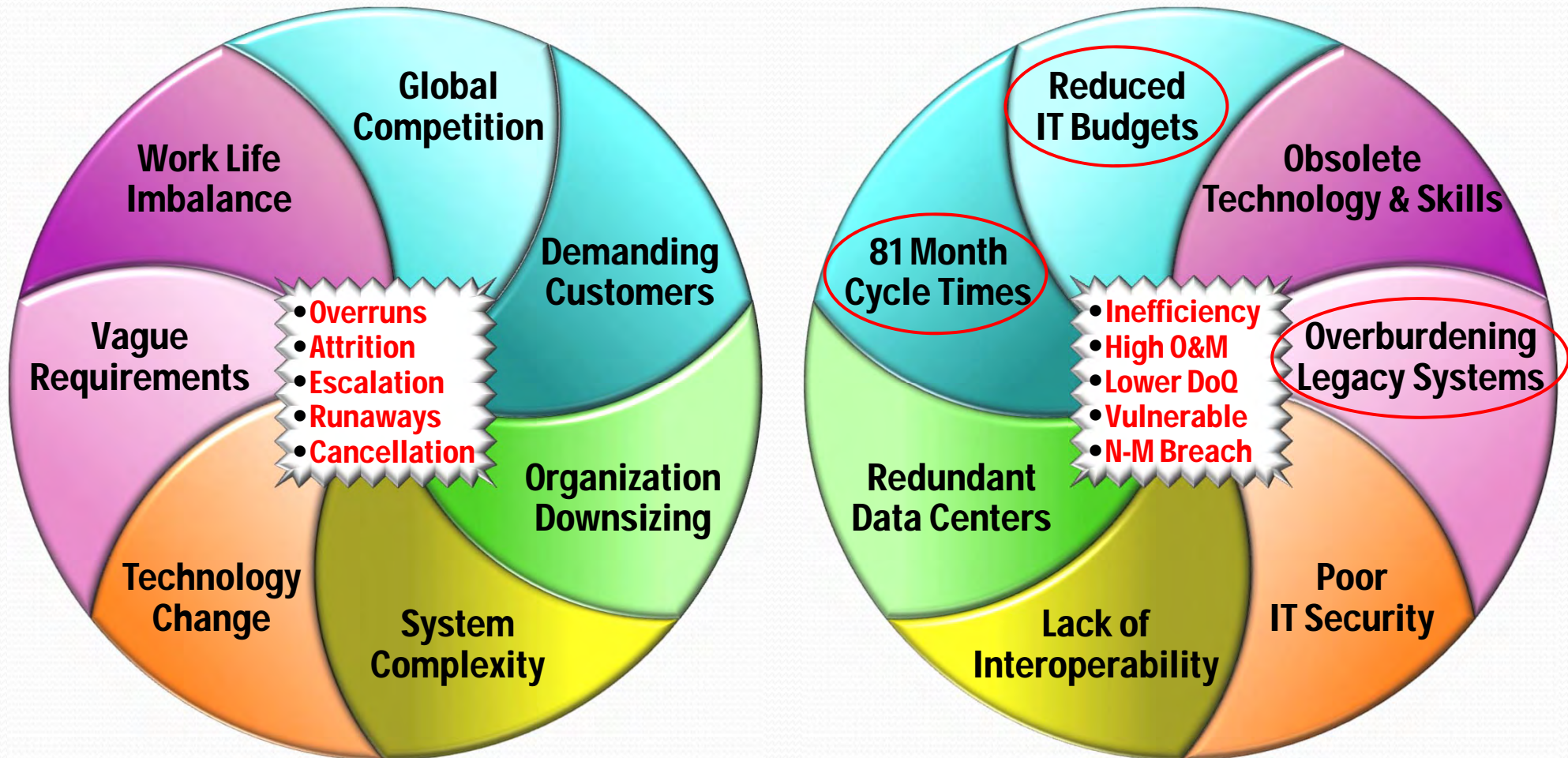→ *Professor at 7 Washington, DC-area universities*

Leadership — Lao Tzu ~550 BC

"A leader is best when people barely know he exists, when his work is done, his aim fulfilled, they will say: we did it ourselves."
- Lao Tzu

Organizational Challenges

Left wheel:
- Global Competition
- Work Life Imbalance
- Vague Requirements
- Technology Change
- System Complexity
- Organization Downsizing
- Demanding Customers

Center burst:
- Overruns
- Attrition
- Escalation
- Runaways
- Cancellation

Right wheel:
- Reduced IT Budgets
- Obsolete Technology & Skills
- 81 Month Cycle Times
- Overburdening Legacy Systems
- Redundant Data Centers
- Lack of Interoperability
- Poor IT Security

Center burst:
- Inefficiency
- High O&M
- Lower DoQ
- Vulnerable
- N-M Breach

Pine, B. J. (1993). *Mass customization*: *The new frontier in business competition*. Boston, MA: Harvard Business School Press. Pontius, R. W. (2012). Acquisition of IT: Improving efficiency and effectiveness in IT acquisition in the DoD. *Second Annual AFEI/NDIA Conference on Agile in DoD, Springfield, VA, USA*.
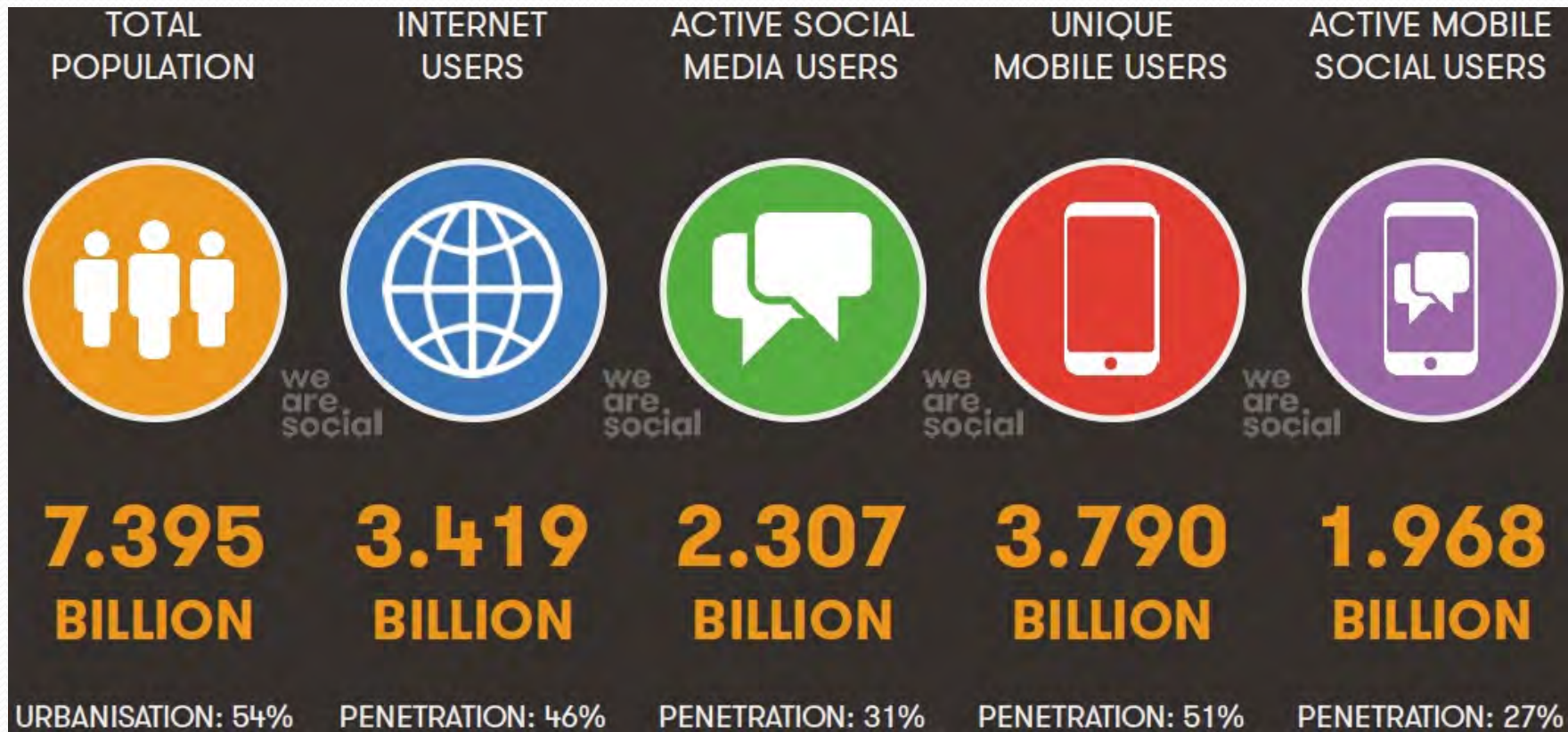
Internet Marketplace Challenges

- Most of world's population connected to Internet
- Systems must support billions of simultaneous users
- ☞ New approaches are needed to scale to global market

TOTAL POPULATION	INTERNET USERS	ACTIVE SOCIAL MEDIA USERS	UNIQUE MOBILE USERS	ACTIVE MOBILE SOCIAL USERS
7.395 BILLION	3.419 BILLION	2.307 BILLION	3.790 BILLION	1.968 BILLION
URBANISATION: 54%	PENETRATION: 46%	PENETRATION: 31%	PENETRATION: 51%	PENETRATION: 27%

Kemp, S. (2016). *Digital in 2016: We are social's compendium of global digital, social, and mobile data, trends, and statistics*. New York, NY: We Are Social, Inc.

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Internet of Things Challenges

IoT is an Extinction Level Event

- 25-50B Devices on IOT
- 5-10B Internet Hosts
- 4-8B Mobile Phones
- 2-3B End User Sys
- Mass Business Failure
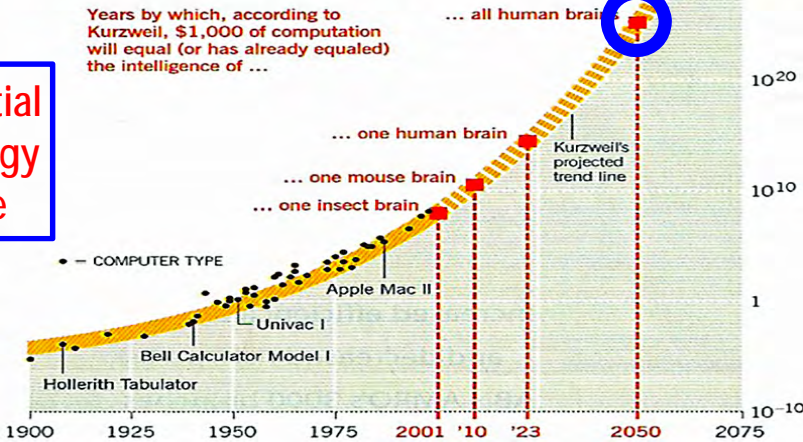
Newton's 3rd Law Challenges

THE KURZWEIL CURVE

Moore's Law is just the beginning: The power of technology will keep growing exponentially, says Kurzweil. By 2050, you'll be able to buy a device with the computational capacity of all mankind for the price of a nice refrigerator today.
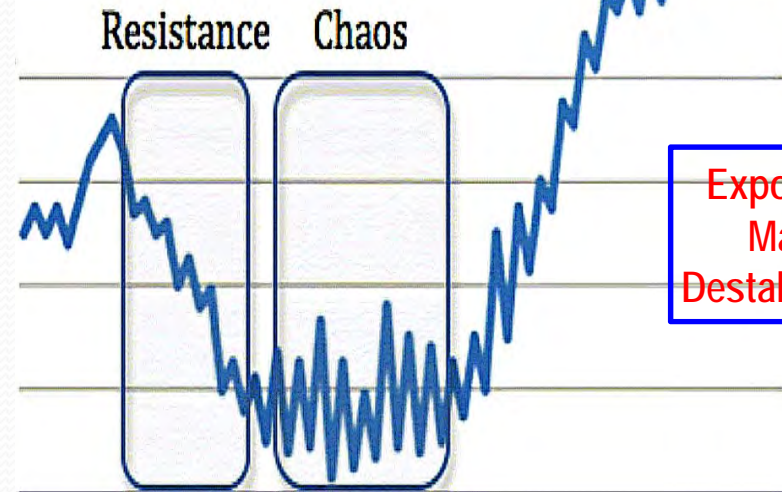
Computer performance
Plotted by number of calculations per second per $1,000

Singularity

Years by which, according to Kurzweil, $1,000 of computation will equal (or has already equaled) the intelligence of ...

... all human brain
... one human brain
... one mouse brain
... one insect brain

Kurzweil's projected trend line

— COMPUTER TYPE

Apple Mac II
Univac I
Bell Calculator Model I
Hollerith Tabulator

Exponential Technology Change

THE SATIR CURVE

Resistance   Chaos

Exponential Market Destabilization

Exponential Business Failures (1990s)

71%

Exponential Business Failures (2000s)

56%
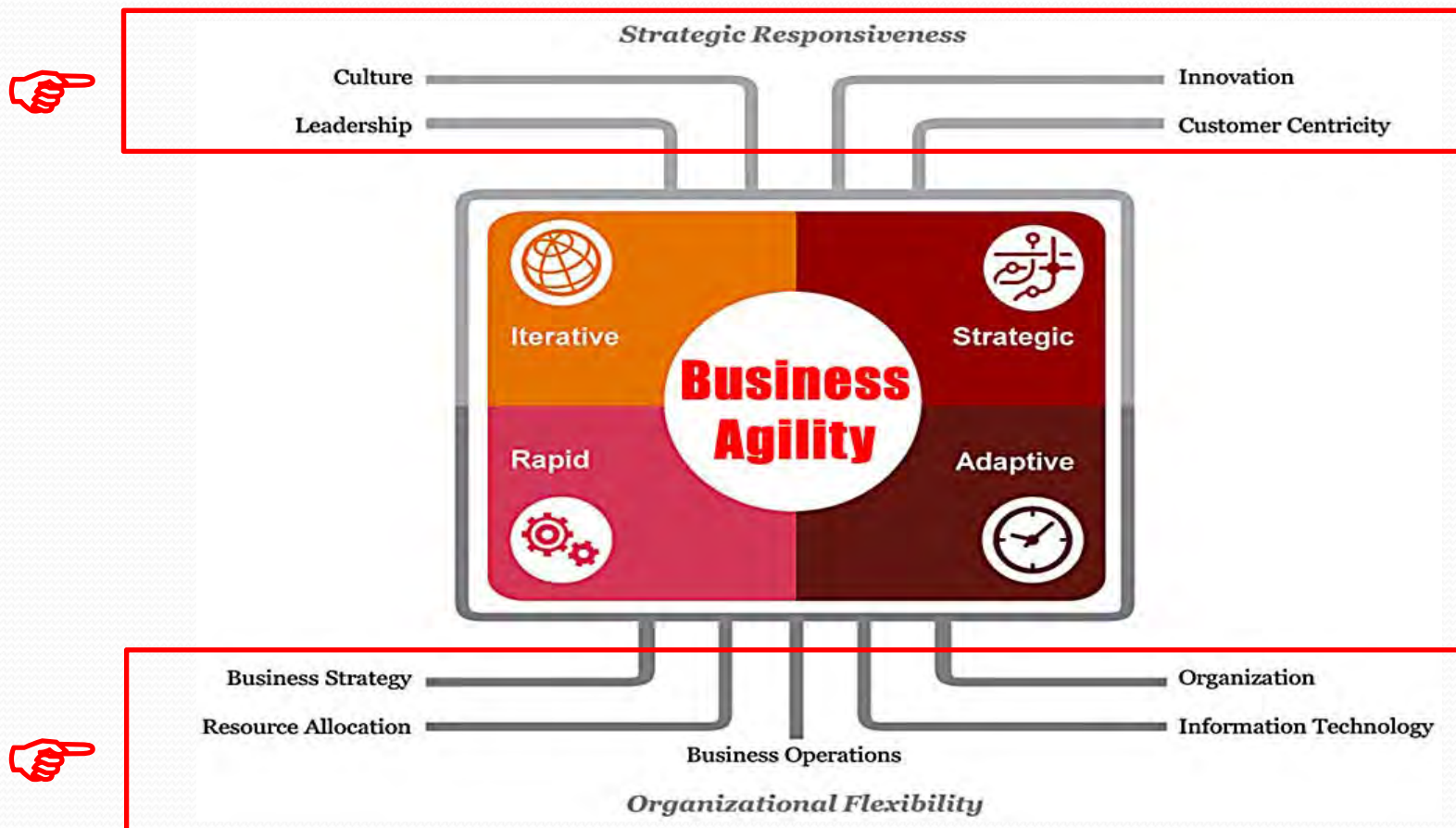**SERVICES**

71%
MANUFACTURING
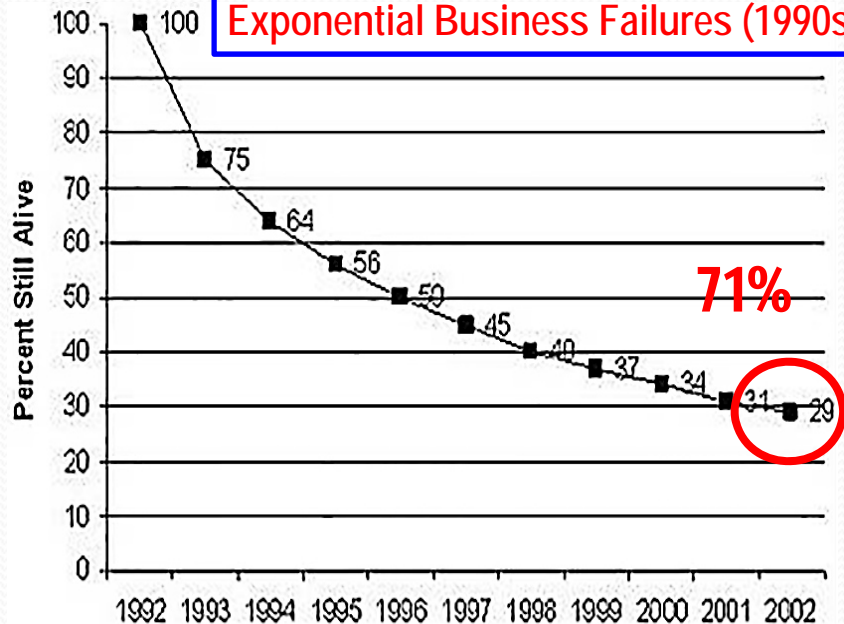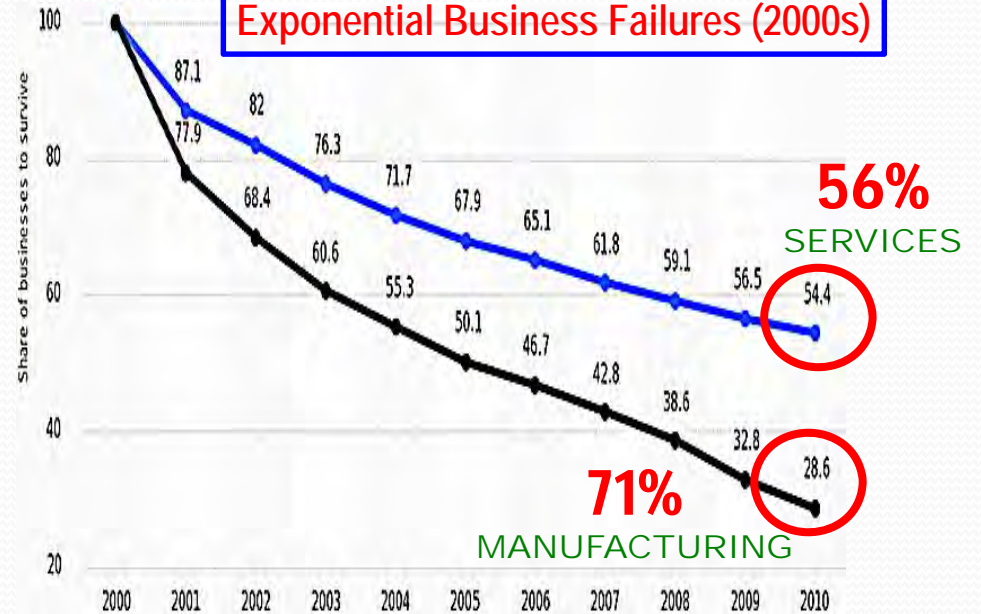
What is **Agility?**

- **A-gil-i-ty** (ə-'ji-lə-tē) Property consisting of quickness, lightness, and ease of movement; To be very nimble

  - *The ability to create and* **respond to change** *in order to profit in a turbulent global business environment*

  - *The ability to* **quickly reprioritize** *use of resources when requirements, technology, and knowledge shift*

  - *A very* **fast response** *to sudden market changes and emerging threats by intensive* **customer interaction**

  - *Use of* **evolutionary**, **incremental**, *and* **iterative** *delivery to converge on an optimal customer solution*

  - *Maximizing* **BUSINESS VALUE** *with right sized, just-enough, and just-in-time processes and documentation*

Highsmith, J. A. (2002). *Agile software development ecosystems*. Boston, MA: Addison-Wesley.

What are Agile Values?

- ☐ People-centric way to create innovative solutions
- ☐ Product-centric alternative to big work-in-process
- ☞ ☐ Market-centric model to maximize business value

Strategic Responsiveness

Culture — Innovation
Leadership — Customer Centricity

Iterative | Strategic
Business Agility
Rapid | Adaptive

Business Strategy — Organization
Resource Allocation — Information Technology
Business Operations

Organizational Flexibility

Hearrell, R. (2015). *Building enterprise agility*. New York, NY: PricewaterhouseCoopers.

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Examples of Agile Behaviors?

- ☐ Early models based on strategies & operations
- ☐ Evolved into an experimental sense & response
- ☞ ☐ Products, organization, & facilities important too

1. STRATEGIC AGILITY	2. CULTURAL AGILITY	3. PROCESS AGILITY
Experimental Sense & Respond	Collaborative & Empowered	Lean, Agile, & Continuous

4. PRODUCT & SERVICE AGILITY		5. TECHNOLOGY AGILITY
Fewer, Smaller, & Inexpensive	**BUSINESS AGILITY**	Software-Based Microservices

6. IT INFRASTRUCTURE AGILITY	7. ORGANIZATION DESIGN AGILITY	8. CAPITAL INFRASTRUCTURE AGILITY
Public Internet Services Based	Flat, Networked, & Holocratic	On-Demand Teleworkers

Rico, D. F. (2016). *Agile businesses*: *A metamodel of lean and agile organizational strategies*. Retrieved March 1, 2016, from http://davidfrico.com
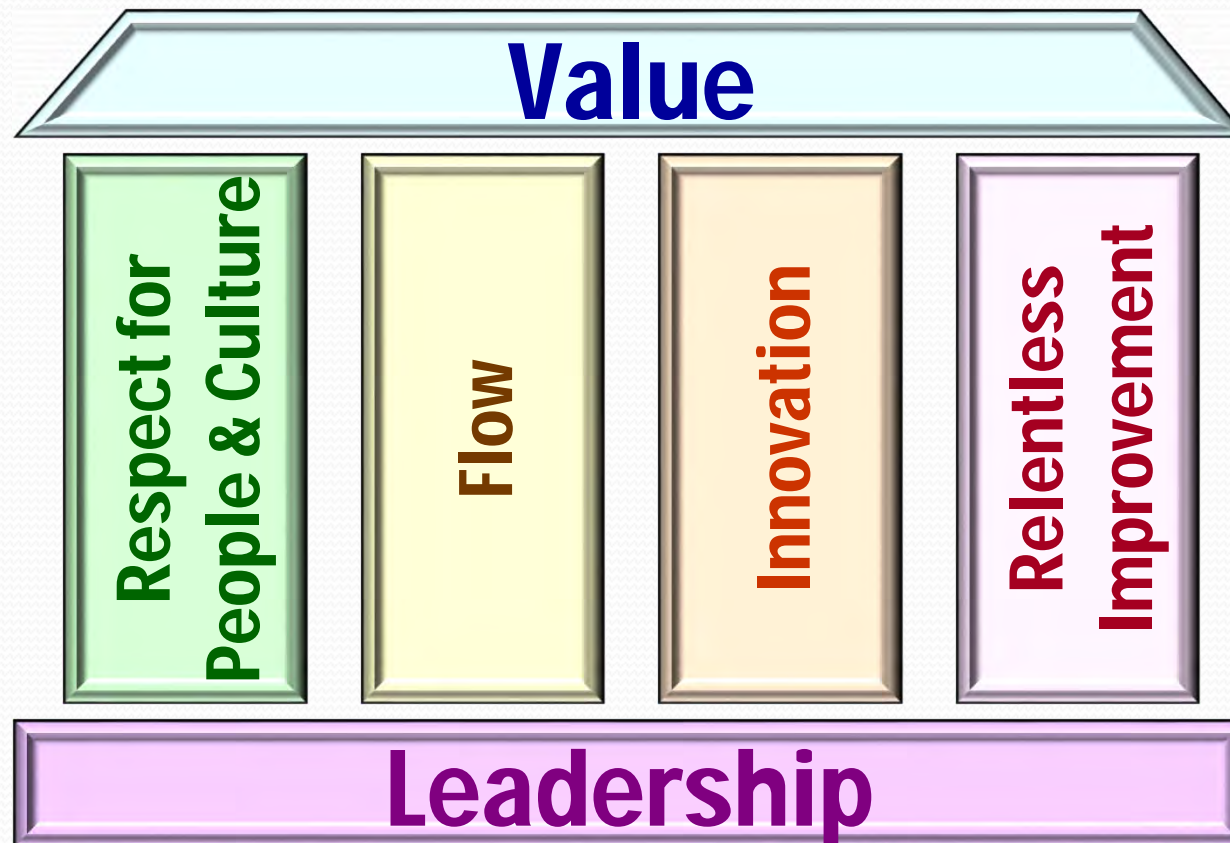
What is Lean?

- **Lean** (lēn): Property consisting of being thinness, slimness, and skinniness; To be extremely slender

  - *A customer-driven product development process that delivers the maximum amount of business value*

  - *An economical way of planning and managing the development of complex new products and services*

  - *A product development process that is free of excess waste, capacity, and non-value adding activities*

  - *Just-enough, just-in-time, and right-sized product development processes, documentation, and tools*

  - *A product development approach that is ADAPTABLE TO CHANGE in customer needs and market conditions*

Womack, J. P., & Jones, D. T. (1996). *Lean thinking*: *Banish waste and create wealth in your corporation*. New York, NY: Free Press.

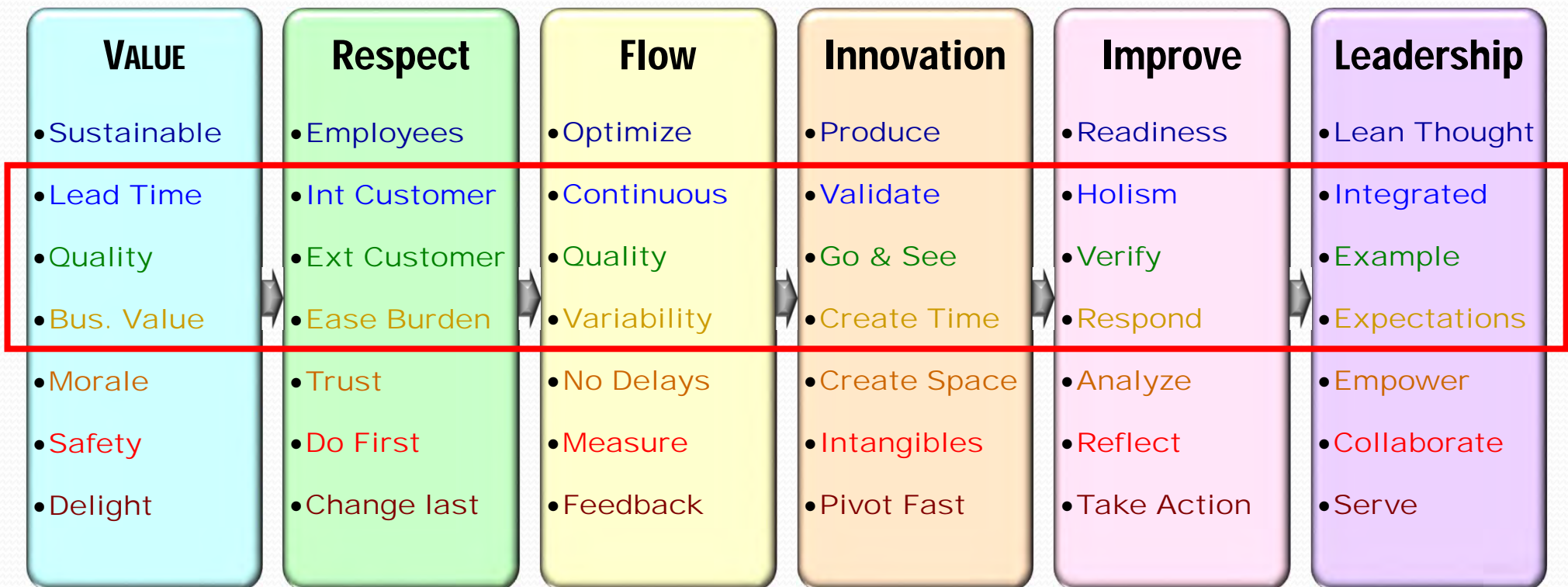# What are **Lean Values**?

- Time-centric way to compete on speed & time
- Customer-centric model to optimize cost & quality
☞ - Pull-centric alternative to wasteful mass production

Value

| Respect for People & Culture | Flow | Innovation | Relentless Improvement |

Leadership

Leffingwell, D. (2017). *The SAFe house of lean*. Retrieved February 19, 2018, from http://www.scaledagileframework.com

Examples of Lean Behaviors?

- Numerous models of lean organizational behaviors
- Many of them stem from Womack's 5 Lean principles
- ☞ Include value, people, flow, value, & esp. **LEADERSHIP**

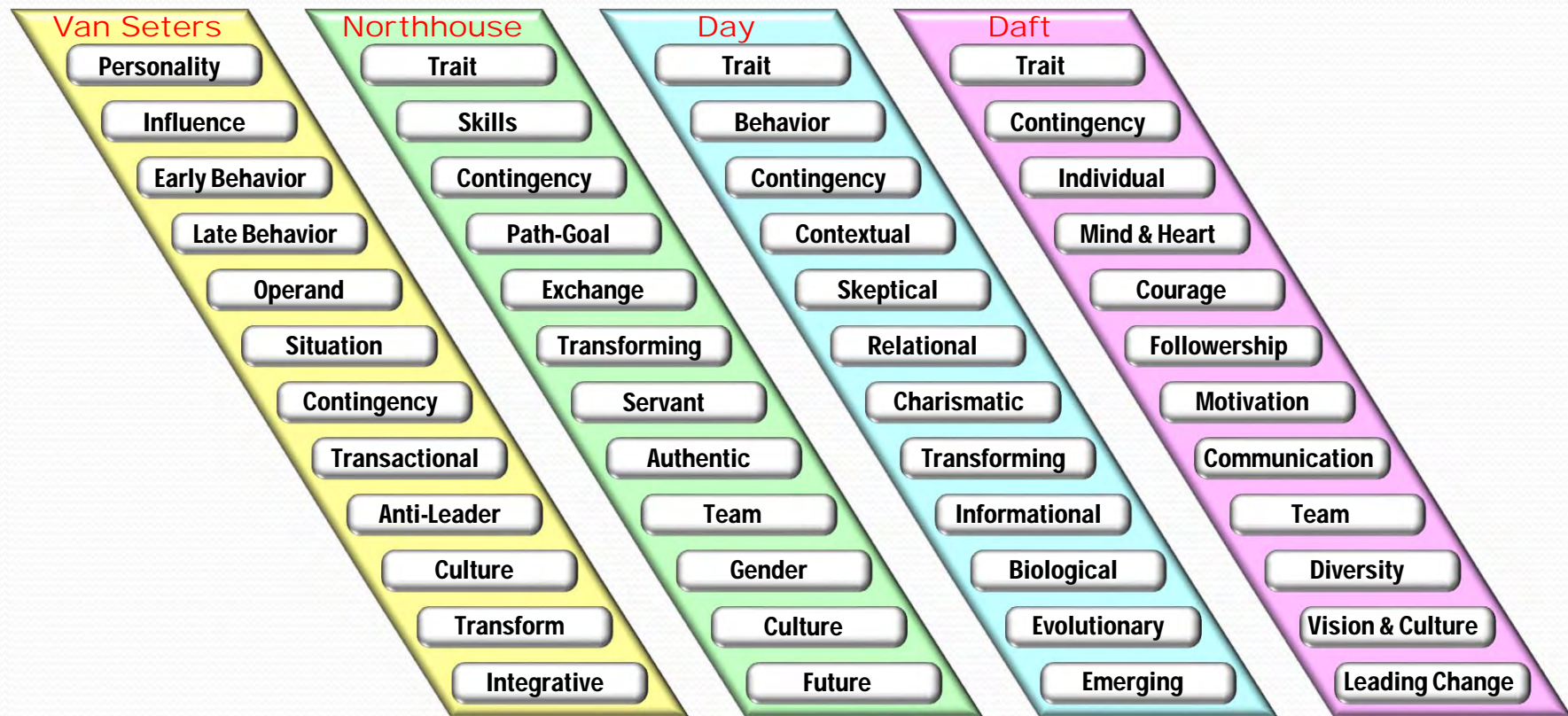| VALUE	Respect	Flow	Innovation	Improve	Leadership
•Sustainable	•Employees	•Optimize	•Produce	•Readiness	•Lean Thought
•Lead Time	•Int Customer	•Continuous	•Validate	•Holism	•Integrated
•Quality	•Ext Customer	•Quality	•Go & See	•Verify	•Example
•Bus. Value	•Ease Burden	•Variability	•Create Time	•Respond	•Expectations
•Morale	•Trust	•No Delays	•Create Space	•Analyze	•Empower
•Safety	•Do First	•Measure	•Intangibles	•Reflect	•Collaborate
•Delight	•Change last	•Feedback	•Pivot Fast	•Take Action	•Serve

What is Lean & Agile LEADERSHIP?

- **Lead-er-ship** (ˈlēdər,SHip) Act or instance of leading, guiding, or coaching; To inspire lean and agile thinking
  - *Leadership framework for using* lean & agile thinking *at the* enterprise, portfolio, program, *&* project *levels*
  - *An approach embracing values and principles of* lean thinking, product development flow, *&* agile methods
  - *Adaptable framework for* collaboration, prioritizing work, iterative development, *& responding to change*
  - *Tools for agile* scaling, *rigorous and disciplined* planning *&* architecture, *and a sharp focus on* product quality
  - ☞ *Maximizes* **BUSINESS VALUE** *of organizations, programs, & projects with lean-agile values, principles, & practices*

Leffingwell, D. (2011). *Agile software requirements*: *Lean requirements practices for teams, programs, and the enterprise*. Boston, MA: Pearson Education.
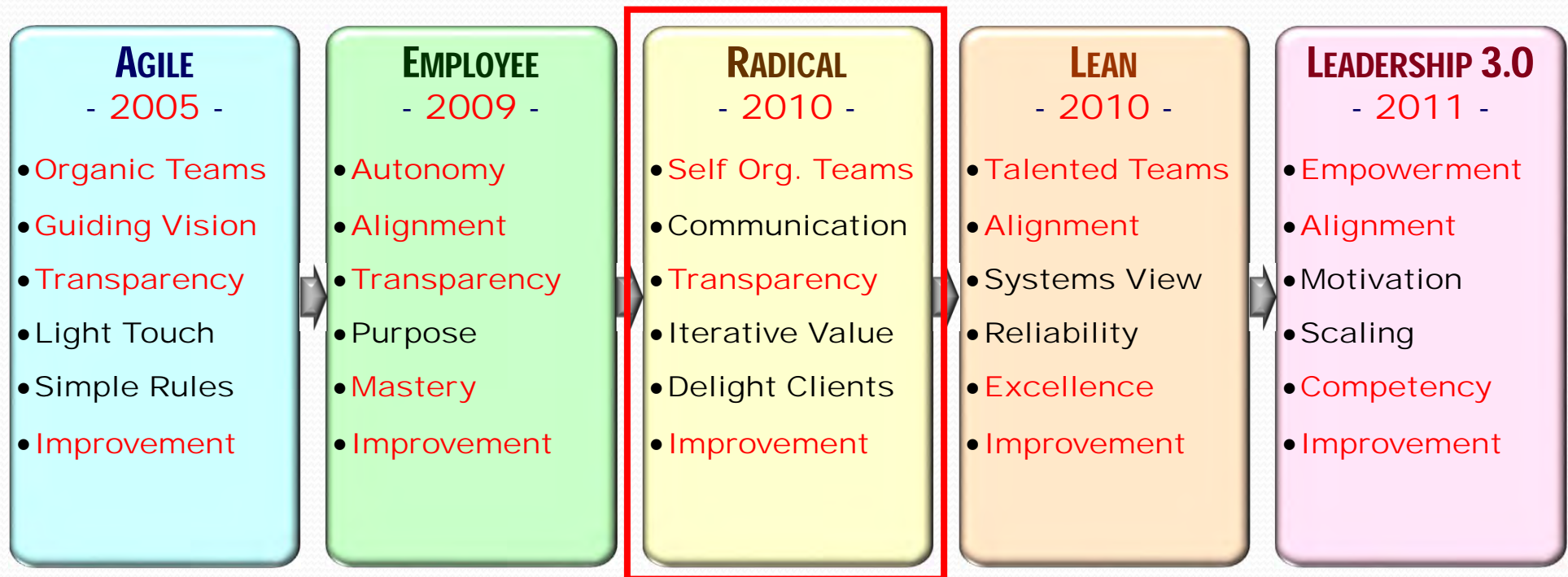
History of TRADITIONAL LEADERSHIP

- Many leadership theories emerged in last 100 years
- Many believe there is no unified theory of leadership
- ☞ Truth is some where in middle of old and new ideas

Van Seters	Northhouse	Day	Daft
Personality	Trait	Trait	Trait
Influence	Skills	Behavior	Contingency
Early Behavior	Contingency	Contingency	Individual
Late Behavior	Path-Goal	Contextual	Mind & Heart
Operand	Exchange	Skeptical	Courage
Situation	Transforming	Relational	Followership
Contingency	Servant	Charismatic	Motivation
Transactional	Authentic	Transforming	Communication
Anti-Leader	Team	Informational	Team
Culture	Gender	Biological	Diversity
Transform	Culture	Evolutionary	Vision & Culture
Integrative	Future	Emerging	Leading Change

Van Seters, D. A., & Field, R. H. (1990). The evolution of leadership theory. *Journal of Organizational Change Management, 3*(3), 29–45.
Daft, R. L. (2011). *The leadership experience*. Mason, OH: Thomson Higher Education.
Day, D. V., & Anbtonakis, J. (2012). *The nature of leadership*. Thousand Oaks, CA: Sage Publications.
Northouse, P. G. (2013). *Leadership: Theory and practice*. Thousand Oaks, CA: Sage Publications.

LEAN & AGILE LEADERSHIP Models

- Many theories of lean and agile leadership emerging
- Generous delegation, empowerment, and motivation
- ☞ Leadership has major role in visioning and enabling

AGILE - 2005 -	EMPLOYEE - 2009 -	RADICAL - 2010 -	LEAN - 2010 -	LEADERSHIP 3.0 - 2011 -
• Organic Teams	• Autonomy	• Self Org. Teams	• Talented Teams	• Empowerment
• Guiding Vision	• Alignment	• Communication	• Alignment	• Alignment
• Transparency	• Transparency	• Transparency	• Systems View	• Motivation
• Light Touch	• Purpose	• Iterative Value	• Reliability	• Scaling
• Simple Rules	• Mastery	• Delight Clients	• Excellence	• Competency
• Improvement	• Improvement	• Improvement	• Improvement	• Improvement

Augustine, S. (2005). *Managing agile projects*. Upper Saddle River, NJ: Pearson Education.

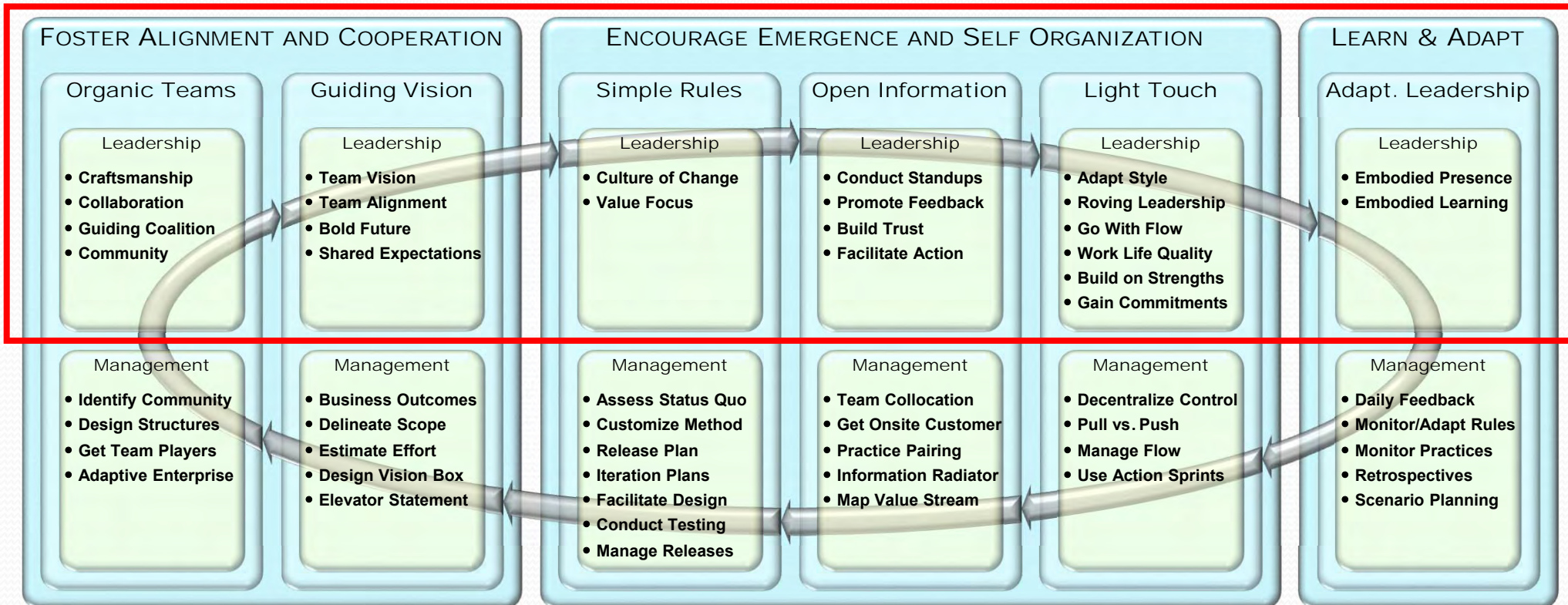Pink, D. H. (2009). *Drive*: *The surprising truth about what motivates us*. New York, NY: Penguin Books.

Denning, S. (2010). *The leader's guide to radical management*: *Reinventing the workplace for the 21st century*. San Francisco, CA: John Wiley & Sons.

Poppendieck, M, & Poppendieck, T. (2010). *Leading lean software development*: *Results are not the point*. Boston, MA: Pearson Education.

Appelo, J. (2011). *Management 3.0*: *Leading agile developers and developing agile leaders*. Boston, MA: Pearson Education.
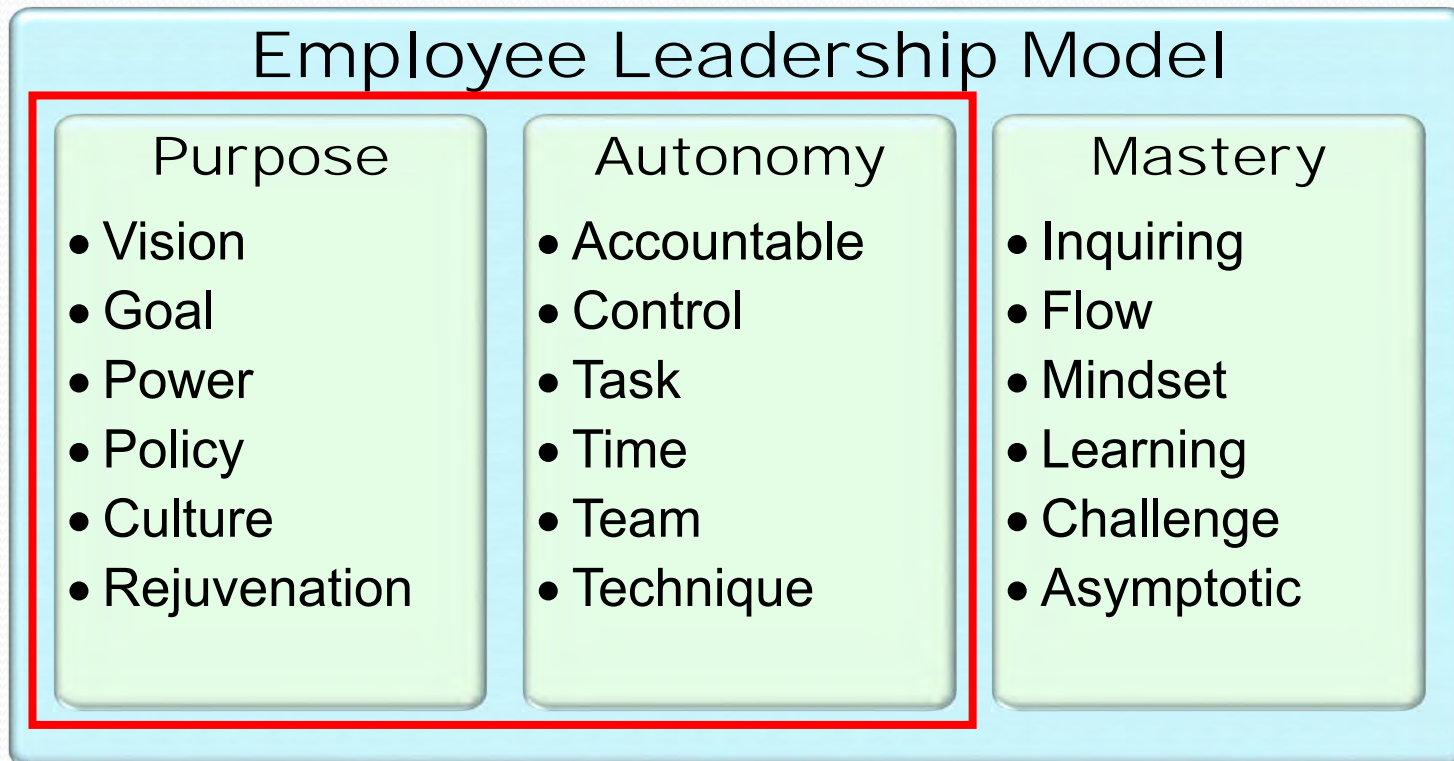
AGILE LEADERSHIP Model

- □ Created by Sanjiv Augustine at CC Pace in 2005
- □ Builds agile cultures, mind-sets, & environment
- ☞ □ Leadership model for managing agile projects

FOSTER ALIGNMENT AND COOPERATION		ENCOURAGE EMERGENCE AND SELF ORGANIZATION			LEARN & ADAPT
Organic Teams	**Guiding Vision**	**Simple Rules**	**Open Information**	**Light Touch**	**Adapt. Leadership**
Leadership • Craftsmanship • Collaboration • Guiding Coalition • Community	**Leadership** • Team Vision • Team Alignment • Bold Future • Shared Expectations	**Leadership** • Culture of Change • Value Focus	**Leadership** • Conduct Standups • Promote Feedback • Build Trust • Facilitate Action	**Leadership** • Adapt Style • Roving Leadership • Go With Flow • Work Life Quality • Build on Strengths • Gain Commitments	**Leadership** • Embodied Presence • Embodied Learning
Management • Identify Community • Design Structures • Get Team Players • Adaptive Enterprise	**Management** • Business Outcomes • Delineate Scope • Estimate Effort • Design Vision Box • Elevator Statement	**Management** • Assess Status Quo • Customize Method • Release Plan • Iteration Plans • Facilitate Design • Conduct Testing • Manage Releases	**Management** • Team Collocation • Get Onsite Customer • Practice Pairing • Information Radiator • Map Value Stream	**Management** • Decentralize Control • Pull vs. Push • Manage Flow • Use Action Sprints	**Management** • Daily Feedback • Monitor/Adapt Rules • Monitor Practices • Retrospectives • Scenario Planning

Augustine, S. (2005). *Managing agile projects*. Upper Saddle River, NJ: Pearson Education.

EMPLOYEE LEADERSHIP Model

- Created by bestselling author Dan Pink in 2009
- Integrates & reconciles field of motivation theories
- People more productive when enjoying themselves
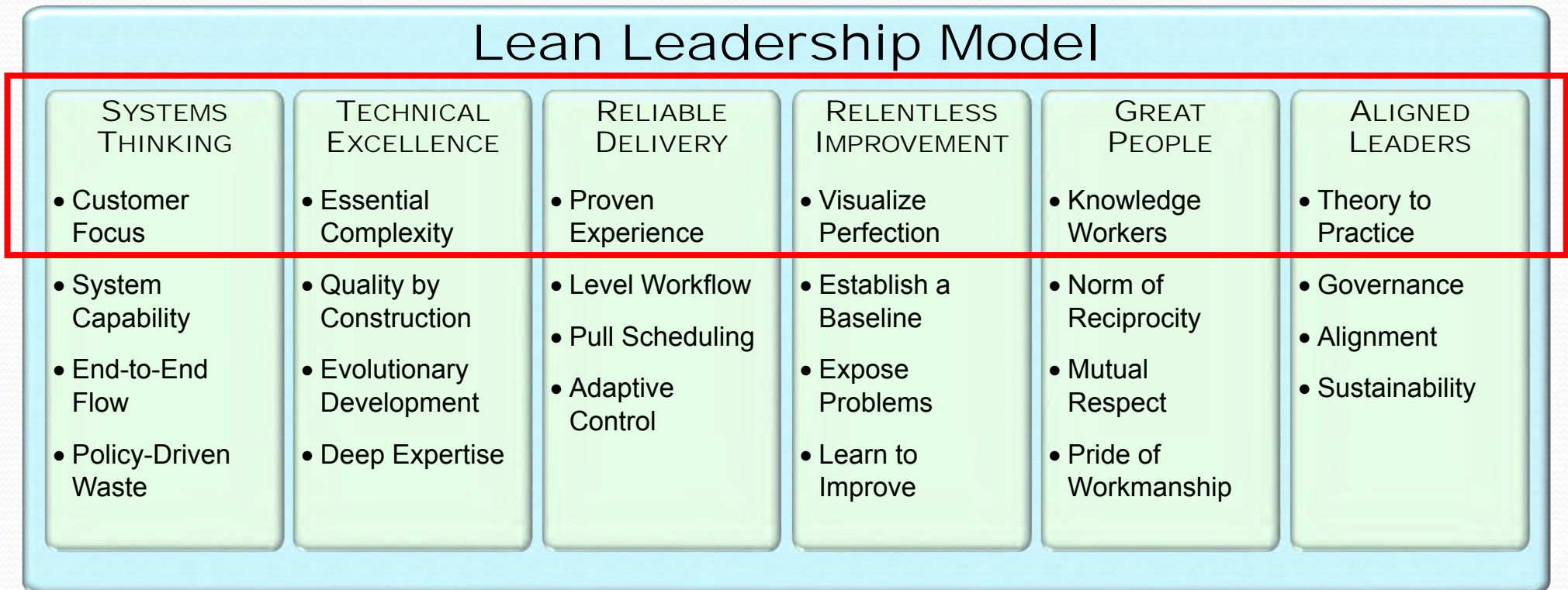
Employee Leadership Model

Purpose	Autonomy	Mastery
• Vision	• Accountable	• Inquiring
• Goal	• Control	• Flow
• Power	• Task	• Mindset
• Policy	• Time	• Learning
• Culture	• Team	• Challenge
• Rejuvenation	• Technique	• Asymptotic

Pink, D. H. (2009). *Drive*: *The surprising truth about what motivates us*. New York, NY: Riverhead Books.

RADICAL LEADERSHIP Model

- ☐ Created by bestselling author Steve Denning in 2010
- ☐ Integrates leadership, client focus and agile methods
☞ ☐ Goal is delighting clients by exceeding expectations

Radical Leadership Model

Delighting Clients	Self Org. Teams	Client Driven Iterations	Delivering Value	Radical Transparency	Continuous Improvement	Interactively Communicate
• Identify clients	• Purpose	• Client focus	• Team focus	• Client interface	• Line-of-sight	• Storytelling
• Tacit desires	• Communicate	• Prioritize	• Preparation	• Daily contact	• Success	• Capture stories
• Simplicity	• Empowerment	• Client value	• Estimation	• Retrospectives	• Alignment	• Focus teams
• Offer less	• Tailor oversight	• Involvement	• Small batches	• Improvement	• Root causes	• Stimulation
• Exploration	• Recognition	• Simplicity	• Empowerment	• Radiators	• Make changes	• Succ. Stories
• People focus	• Remuneration	• Validate	• Communicate	• Impediments	• Get feedback	• Listen
• Meet clients	• Consistency	• Improve	• Sustainability	• Go-and-see	• Info. sharing	• Recognition

Denning, S. (2010). *The leader's guide to radical management*: *Reinventing the workplace for the 21st century*. San Francisco, CA: John Wiley & Sons.

LEAN LEADERSHIP Model

- Created by Mary & Tom Poppendieck in 2010
- Integrates leadership, lean thinking & agile methods
- ☞ Goal is a customer-driven pull-system for leadership

Lean Leadership Model

SYSTEMS THINKING	TECHNICAL EXCELLENCE	RELIABLE DELIVERY	RELENTLESS IMPROVEMENT	GREAT PEOPLE	ALIGNED LEADERS
• Customer Focus	• Essential Complexity	• Proven Experience	• Visualize Perfection	• Knowledge Workers	• Theory to Practice
• System Capability	• Quality by Construction	• Level Workflow	• Establish a Baseline	• Norm of Reciprocity	• Governance
• End-to-End Flow	• Evolutionary Development	• Pull Scheduling	• Expose Problems	• Mutual Respect	• Alignment
• Policy-Driven Waste	• Deep Expertise	• Adaptive Control	• Learn to Improve	• Pride of Workmanship	• Sustainability

Poppendieck, M, & Poppendieck, T. (2010). *Leading lean software development: Results are not the point*. Boston, MA: Pearson Education.

LEADERSHIP 3.0 Model

- Created by Jurgen Appelo in 2011 (Netherlands)
- Integrative model for agile organizational leadership
- ☞ Focus on motivation, teamwork, purpose, & mastery

Leadership 3.0 Model

ENERGIZE PEOPLE	EMPOWER TEAMS	ALIGN CONSTRAINTS	DEVELOP COMPETENCE	GROW STRUCTURE	IMPROVE EVERYTHING
• Manage Creativity	• Reduce Fear	• Shared Goal	• Optimize Whole	• Develop Leaders	• Improvement
• Motivate People	• Maturity Models	• Communication	• Coach & Mentor	• Select Teams	• Transition Team
• Intrinsic Rewards	• Authority Level	• Goal Autonomy	• Social Pressure	• Org. Style	• Change Env.
• Team Diversity	• Assign to Teams	• Leadership Angle	• Adaptable Tools	• Value Units	• Change Desire.
• Prof. Personality	• Practice Patience	• Protect People	• 360° Meetings	• Teams & Layers	• Ext. Feedback
• Team Values	• Massage Env.	• Constrain Quality	• Grow Standards	• Hybrid Org.	• Tailor Changes
• No Door Policy	• Trust & Respect	• Social Contract	• Work the System	• Transparency	• Retrospectives

Appelo, J. (2011). *Management 3.0: Leading agile developers and developing agile leaders*. Boston, MA: Pearson Education.

360 DEGREE LEADERSHIP Models

CHANGE LEADERSHIP DESCRIPTOR	EMOTIONAL QUOTIENT INVENTORY	LEADERSHIP VERSATILITY INDEX	HOGAN 360 LEADERSHIP MODEL	TRAIT EMOTIONAL INTELLIGENCE	LEADERSHIP ASSESSMENT INDEX
• **Major Tasks** – Vision – Management – Empowerment – Diplomacy – Feedback – Entrepreneurialism • **Personal Characteristics** – Style – Energy – Multicultural	• **Intrapersonal** – Assertiveness – Independence • **Interpersonal** – Empathy – Social Responsibility • **Adaptability** – Flexibility – Problem Solving • **Stress Management** – Stress Tolerance – Impulse Control • **General Mood** – Optimism – Happiness	• **Forceful** – Take Charge – Decisive (Declares) – Demanding (Pushes) • **Enabling** – Empowering (Empowers) – Participative (Supports) – Encouraging (Listens) • **Strategic** – Direction – Expansion (Growth) – Innovation • **Operational** – Execution – Efficiency – Order	• **Self Management** – Integrity – Resilience – Communication • **Relationship Management** – People Skills – Team Player – Customer • **Working in Business** – Capability – Efficiency – Results • **Working on Business** – Strategy – Motivation – Innovation	• **Emotionality** – Empathy – Relationships – Emotional Expression – Emotional Perception • **Self Control** – Emotional Regulation – Impulsiveness – Stress Management • **Well Being** – Optimism – Happiness – Self Esteem • **Sociability** – Social Awareness – Assertiveness – Emotion Management	• **Leadership Competency** – Focused Drive – Emotional Intelligence – Trusted Influence – Conceptual Thinking – Systems Thinking • **Leadership Skill** – Strategic Thinking – Comm & Negotiations – Leading Change/Teams – Coaching/Mentoring – Problem Solving • **Leadership Responsibility** – Visioning – Inclusivity – Culture – Innovation – Results
EMOTIONAL QUOTIENT 360	WORK PERSONALITY INDEX	CALIFORNIA PSYCH INV 260	OPM LEADERSHIP 360	FUND INTER REL ORIENT BEH	LEAD PRACTICES INVENTORY 360
• **Self Perception** – Self Regard – Self Actualization – Emotional Self Awareness • **Interpersonal** – Interpersonal Relationships – Empathy – Social Responsibility • **Decision Making** – Problem Solving – Reality Testing – Impulse Control • **Self Expression** – Emotional Expression – Assertiveness – Independence • **Stress Management** – Flexibility – Stress Tolerance – Optimism	• **Achievement Orientation** – Ambition – Initiative – Flexibility – Energy – Leadership • **Conscientiousness** – Persistence – Attention to detail – Rule Following – Dependability • **Social Orientation** – Teamwork – Concern for Others – Outgoing – Democratic • **Practical Intelligence** – Innovation – Analytical Thinking • **Adjustment** – Self-Control – Stress Tolerance	• **Dealing with Others** – Dominance/Status – Sociability – Self Acceptance – Empathy • **Self Management** – Responsibility – Socialization – Self Control – Good Impression • **Motivation & Cognition** – Conformism – Independence – Conceptual Fluency • **Personal Related** – Insightfulness – Flexibility – Sensitivity • **Work Related** – Managerial – Reliability – Creativity – Leadership	• **Fundamental** – Interpersonal – Communication – Learning/Service • **Leading Change** – Innovation – Flexibility – Strategic/Vision • **Leading People** – Conflict – Diversity – Teamwork • **Results Driven** – Customer Service – Decisiveness – Problem Solving • **Business Acumen** – Financial – Human Capital – Technology • **Coalitions** – Partnering – Political – Influencing	• **Expressed Inclusion** – Conversation – Involve/Recognize – Include/Help • **Expressed Control** – Assume Authority – Competitive Stance – Lead/Influence • **Expressed Affection** – Reassure/Concern – Trust Others – Coach Others • **Wanted Inclusion** – Visible/Involvement – Clothing/Workspace – Seek Recognition • **Wanted Control** – Seek Help/Direction – Defer Opinions – Raise Issues • **Wanted Affection** – Flexible – Listen/Open – Share/Give	• **Model Way** – Sets Example – Invests Time – Follow Through – Build Consensus • **Inspire Vision** – Compelling Case – Exciting Appeals – Common Vision – Genuine Conviction • **Challenge Process** – Seeks Challenge – Outside Ideas – Lessons Learned – Experiments & Risks • **Enable Others** – Cooperate – Actively Listen – Dignity & Respect – Support Decisions • **Encourage Heart** – Praise Others – Express Confidence – Give Recognition – Celebrate Others

Keyser, J. (2014). *What can we gain froma a 360 leadership assessment.* Retrieved, September 27, 2017, from http://www.td.org
Vanek, C. (2016). *The complete guide to running 360 degree reviews.* Retrieved September 27, 2017, from http://www.surveygizmo.com
Tirona, M., & Gislason, M. (2011). *The good, bad, and ugly of 360 evaluations,* Retrieved September 27, 2017, from http://nonprofitquarterly.org

Lean & Agile Contract Values

- ☐ Communication, cooperation, and interaction key
- ☐ Shared responsibility vs. blame and adversarialism
- ☐ Needs greater focus on collaboration vs. legal terms

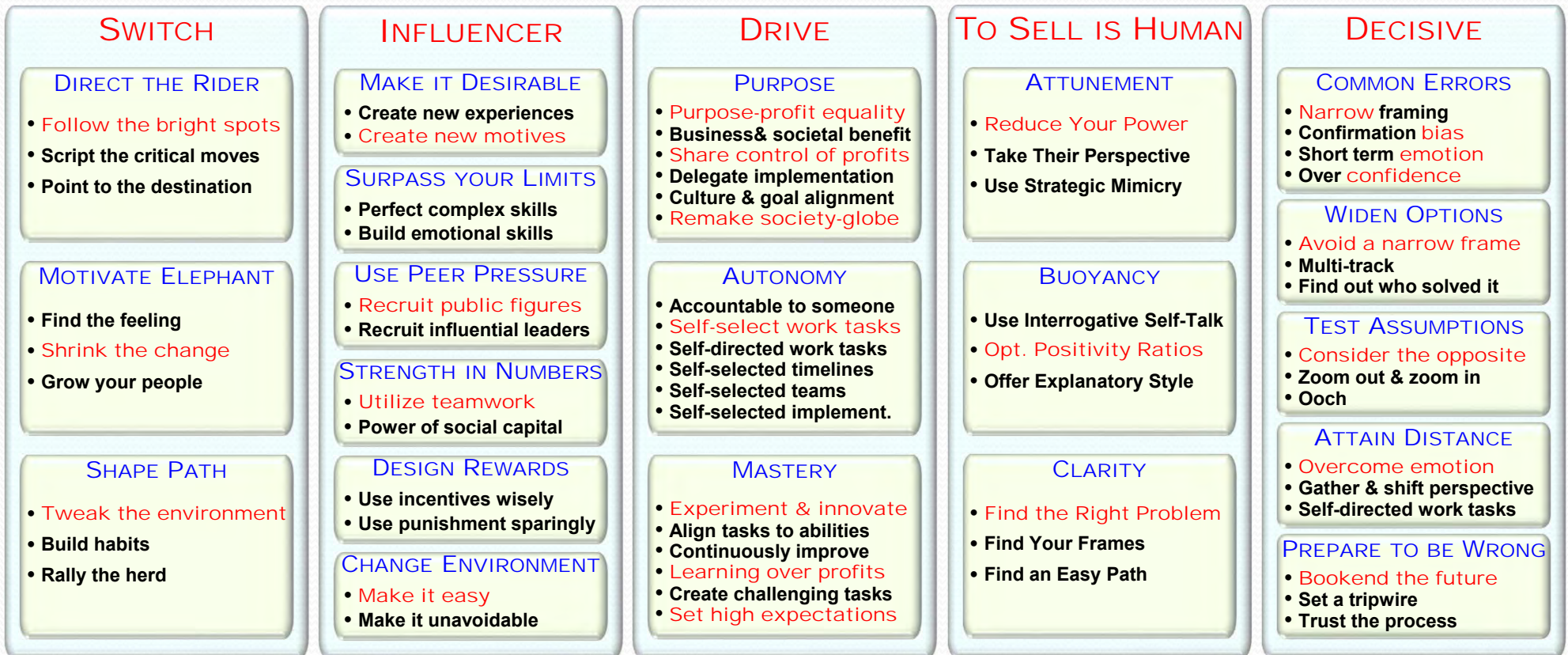| Dynamic Value	Performance Based	Target Cost	Optional Scope	Collaborative

- ✓ *Business & Mission Value* OVER Scope, Processes, & Deliverables
- ✓ *Personal Interactions* OVER Contract, Auditor, & Legal Interactions
- ✓ *Conversations and Consensus* OVER Contract Negotiations & Control
- ✓ *Collaboration & Co-Dependency* OVER Methodology & Adversarialism
- ✓ *Exploration, Evolution, & Emergence* OVER Forecasting & Control
- ✓ *Early Continuous Quality Solutions* OVER Late, Long-Term Deliveries
- ✓ *Entrepreneurialism & Openness* OVER Compliance & Self-Interest
- ✓ *Personnel Delight, Happiness, & Joy* OVER Policies & Governance
- ✓ *Cross-Functionalism, Talent, & Flexibility* OVER Rigid Specialization

Rico, D. F. (2011). *The necessity of new contract models for agile project management*. Fairfax, VA: Gantthead.Com.
Rico, D. F. (2013). *Agile vs. traditional contract manifesto*. Retrieved March 28, 2013 from http://www.davidfrico.com

Lean & Agile Change Models

□ Change, no matter how small or large, is difficult
□ Smaller focused changes help to cross the chasm
☞ □ Simplifying, motivating, and validation key factors

SWITCH	INFLUENCER	DRIVE	TO SELL IS HUMAN	DECISIVE
DIRECT THE RIDER • Follow the bright spots • Script the critical moves • Point to the destination	**MAKE IT DESIRABLE** • Create new experiences • Create new motives	**PURPOSE** • Purpose-profit equality • Business& societal benefit • Share control of profits • Delegate implementation • Culture & goal alignment • Remake society-globe	**ATTUNEMENT** • Reduce Your Power • Take Their Perspective • Use Strategic Mimicry	**COMMON ERRORS** • Narrow framing • Confirmation bias • Short term emotion • Over confidence
MOTIVATE ELEPHANT • Find the feeling • Shrink the change • Grow your people	**SURPASS YOUR LIMITS** • Perfect complex skills • Build emotional skills	**AUTONOMY** • Accountable to someone • Self-select work tasks • Self-directed work tasks • Self-selected timelines • Self-selected teams • Self-selected implement.	**BUOYANCY** • Use Interrogative Self-Talk • Opt. Positivity Ratios • Offer Explanatory Style	**WIDEN OPTIONS** • Avoid a narrow frame • Multi-track • Find out who solved it
	USE PEER PRESSURE • Recruit public figures • Recruit influential leaders			**TEST ASSUMPTIONS** • Consider the opposite • Zoom out & zoom in • Ooch
SHAPE PATH • Tweak the environment • Build habits • Rally the herd	**STRENGTH IN NUMBERS** • Utilize teamwork • Power of social capital			**ATTAIN DISTANCE** • Overcome emotion • Gather & shift perspective • Self-directed work tasks
	DESIGN REWARDS • Use incentives wisely • Use punishment sparingly	**MASTERY** • Experiment & innovate • Align tasks to abilities • Continuously improve • Learning over profits • Create challenging tasks • Set high expectations	**CLARITY** • Find the Right Problem • Find Your Frames • Find an Easy Path	**PREPARE TO BE WRONG** • Bookend the future • Set a tripwire • Trust the process
	CHANGE ENVIRONMENT • Make it easy • Make it unavoidable			

Heath, C., & Heath, D. (2010). *Switch*: *How to change things when change is hard*. New York, NY: Random House.
Patterson, K., et al. (2008). *Influencer*: *The power to change anything*: New York, NY: McGraw-Hill.
Pink, D. H. (2009). *Drive*: *The surprising truth about what motivates us*. New York, NY: Riverhead Books.
Pink, D. H. (2012). *To sell is human*: *The surprising truth about moving others*. New York, NY: Riverhead Books.
Heath, C., & Heath, D. (2013). *Decisive*: *How to make better choices in life and work*. New York, NY: Random House.

Other Leadership Considerations

- ☐ Power & authority delegated to the lowest level
- ☐ Tap into the creative nuclear power of team's talent
- ☞ ☐ Coaching, communication, and relationships key skills

Personal	Project	Enterprise
• Don't Be a Know-it-All	• Customer Communication	• Business Value vs. Scope
• Be Open & Willing to Learn	• Product Visioning	• Interactions vs. Contracts
• Treat People Respectfully	• Distribution Strategy	• Relationship vs. Regulation
• Be Gracious, Humble, & Kind	• Team Development	• Conversation vs. Negotiation
• Listen & Be Slow-to-Speak	• Standards & Practices	• Consensus vs. Dictatorship
• Be Patient & Longsuffering	• Telecom Infrastructure	• Collaboration vs. Control
• Be Objective & Dispassionate	• Development Tools	• Openness vs. Adversarialism
• Don't Micromanage & Direct	• High-Context Meetings	• Exploration vs. Planning
• Exhibit Maturity & Composure	• Coordination & Governance	• Incremental vs. All Inclusive
• Don't Escalate or Exacerbate	• F2F Communications	• Entrepreneurial vs. Managerial
• Don't Gossip or be Negative	• Consensus Based Decisions	• Creativity vs. Constraints
• Delegate, Empower, & Trust	• Performance Management	• Satisfaction vs. Compliance
• Gently Coach, Guide, & Lead	• Personal Development	• Quality vs. Quantity

Rico, D. F. (2013). *Agile coaching in high-conflict environments*. Retrieved April 11, 2013 from http://davidfrico.com/agile-conflict-mgt.pdf

Rico, D. F. (2013). *Agile project management for virtual distributed teams*. Retrieved July 29, 2013 from http://www.davidfrico.com/rico13m.pdf

Rico, D. F. (2013). *Agile vs. traditional contract manifesto*. Retrieved March 28, 2013 from http://www.davidfrico.com/agile-vs-trad-contract-manifesto.pdf
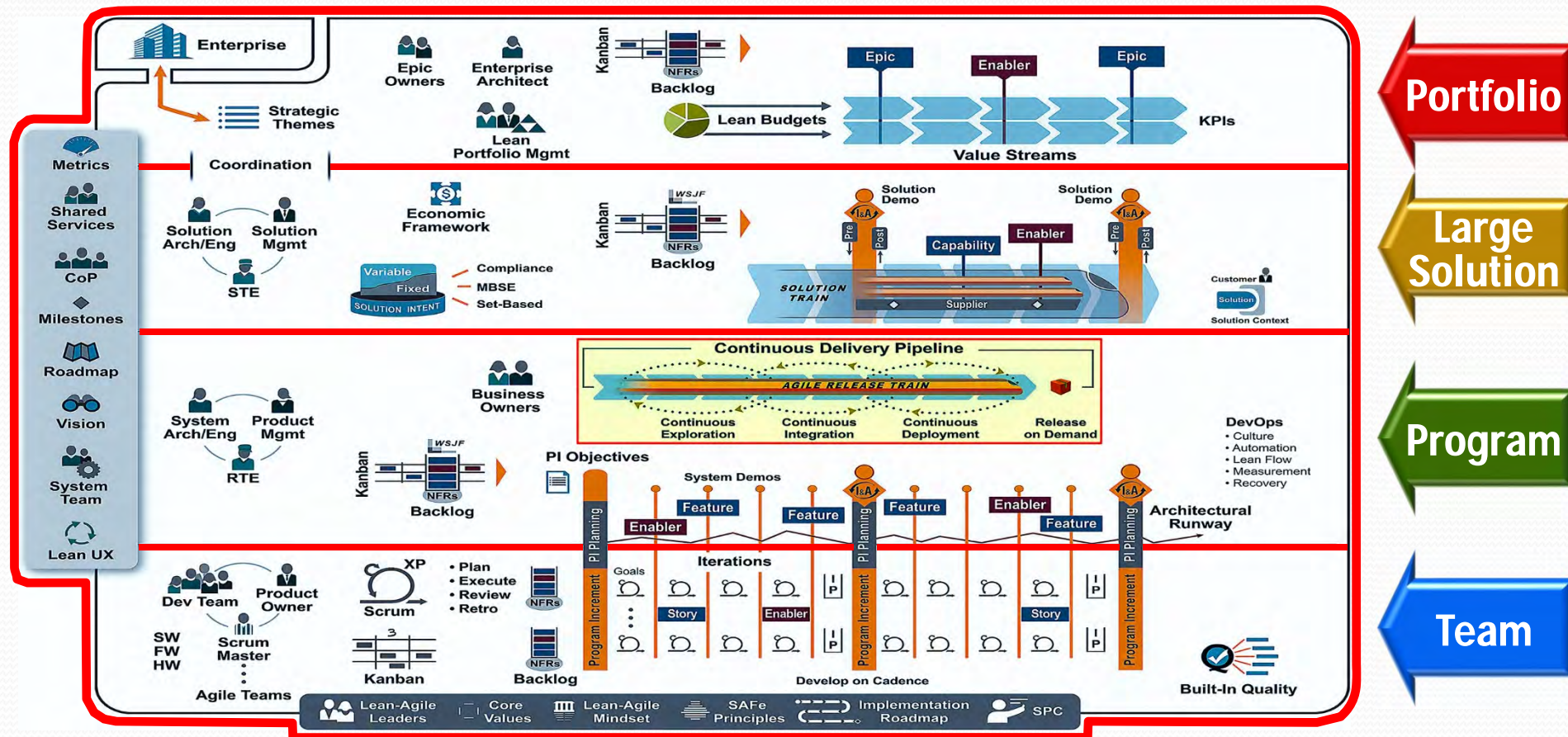
Traditional PORTFOLIO MANAGEMENT

- □ **Portfolio**. Subportfolio, program, project, operations
- □ **Portfolio Mgt**. Manage these to achieve strategic obj.
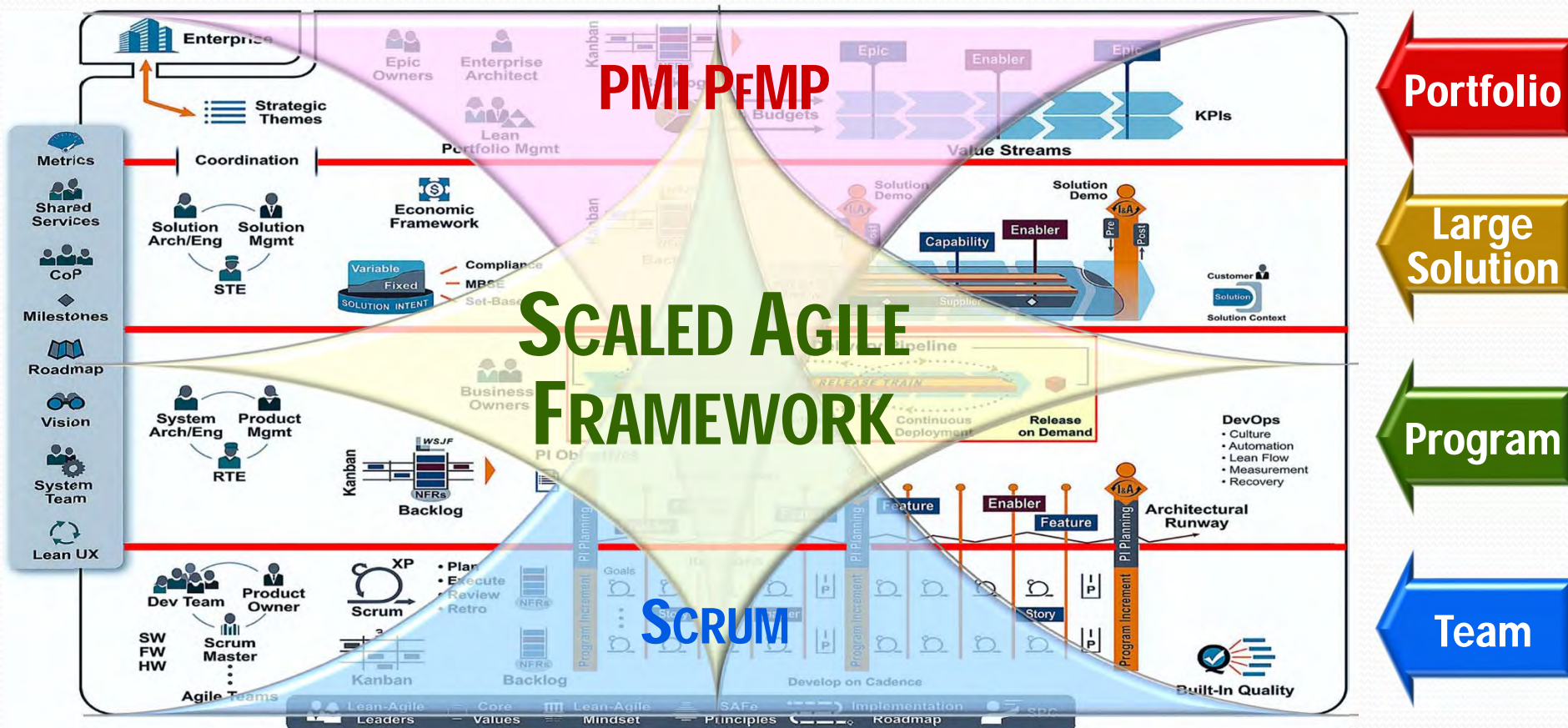- ☞ □ **Objectives**. Includes efficiency, effectiveness, & value

VISION

MISSION

STRATEGY & OBJECTIVES

PORTFOLIO MANAGEMENT

OPERATIONS   PROGRAMS & PROJECTS

ORGANIZATIONAL RESOURCES

Skrabak, J. L. (2013). *The standard for portfolio management* (*Third Edition*). Newtown Square: PA: Project Management Institute.

Lean & Agile PORTFOLIO MANAGEMENT

- ☐ Proven, public well-defined F/W for scaling Lean-Agile
- ☐ Synchronizes alignment, collaboration, and deliveries
- ☐ Quality, execution, alignment, & transparency focus

Leffingwell, D. (2017). *Scaled agile framework (SAFe)*. Retrieved July 4, 2017 from http://www.scaledagileframework.com

Trad. vs. Lean & Agile PORTFOLIOS

- Scrum created to address Agile team mgt.
- SAFe created to address Agile program mgt.
☞ - PfMp created to address Portfolio management

Leffingwell, D. (2007). *Scaling software agility*: *Best practices for large enterprises*. Boston, MA: Pearson Education.

Lean & Agile GOLDILOCKS Zone

- ☐ Traditional project management is scope-based
- ☐ Agile project management is primarily time-based
- ☞ ☐ Batchsize, capacity, & time key to market response

CONSTRAINTS

	WATERFALL	AGILE	LEAN
	Scope	Time — Cost	Batchsize
	RESOURCE PERFORMANCE	BUSINESS VALUE	MARKET RESPONSE

ESTIMATES

WATERFALL	AGILE	LEAN
Cost — Time	Scope	Capacity — Time
Scope Drives Resources	*Time Drives Scope*	*Batchsize Drives Lead/Cycle Time*
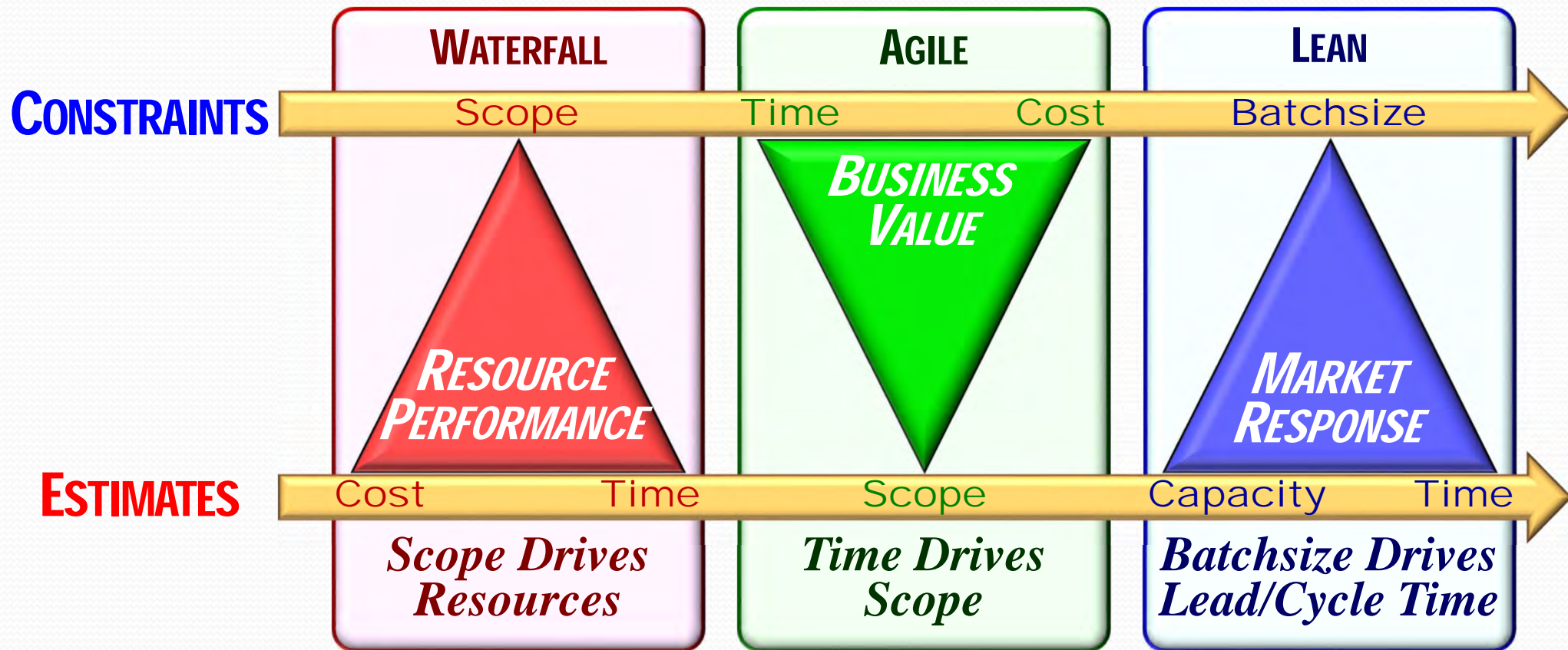
Rico, D. F. (2017). *Lean triangle: Triple constraints*. Retrieved December 17, 2017, from http://davidfrico.com/lean-triangle.pdf

Sylvester, T. (2013). *Waterfall, agile, and the triple constraint*. Retrieved December 16, 2017, from http://tom-sylvester.com/lean-agile/waterfall-agile-the-triple-constraint

Pound, E. S., Bell, J. H., Spearman, M. L. (2014). *Factory physics*: *How leaders improve performance in a post-lean six sigma world*. New York, NY: McGraw-Hill Education.
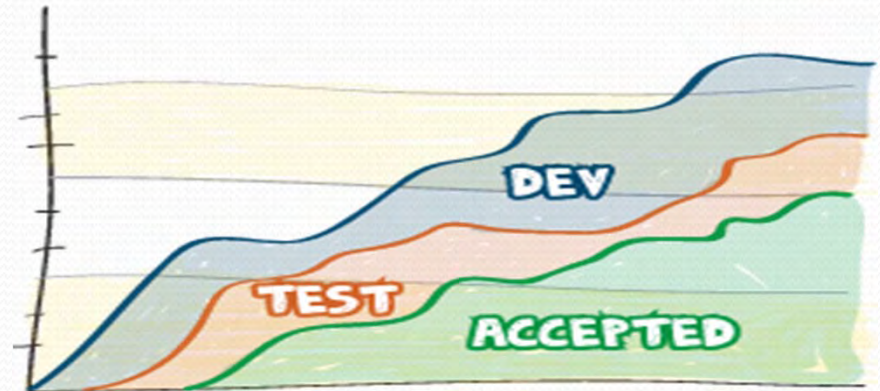
Lean & Agile Basic Measures

- Late big bang integration increases WIP backlog
- Agile testing early and often reduces WIP backlog
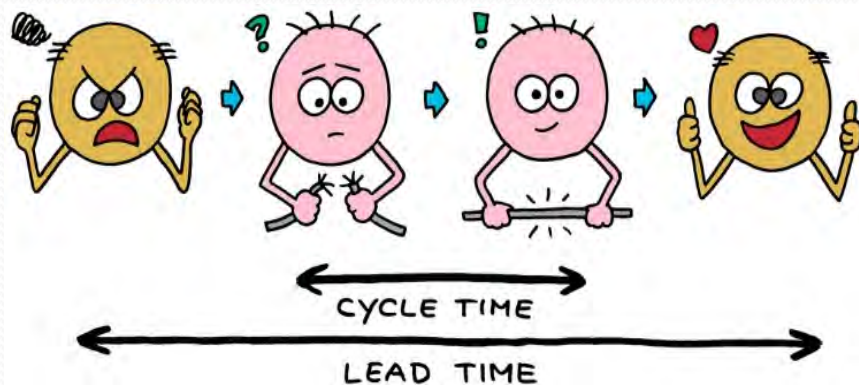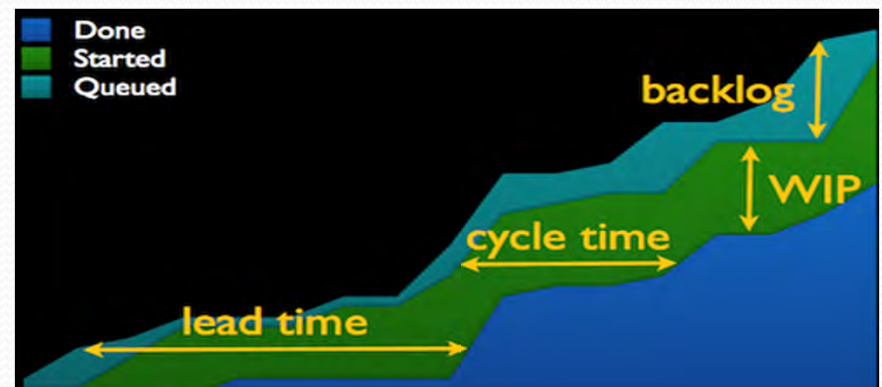- CI/CD/DevOps lower WIP, Cycle Time, & Lead Time

KANBAN BOARD
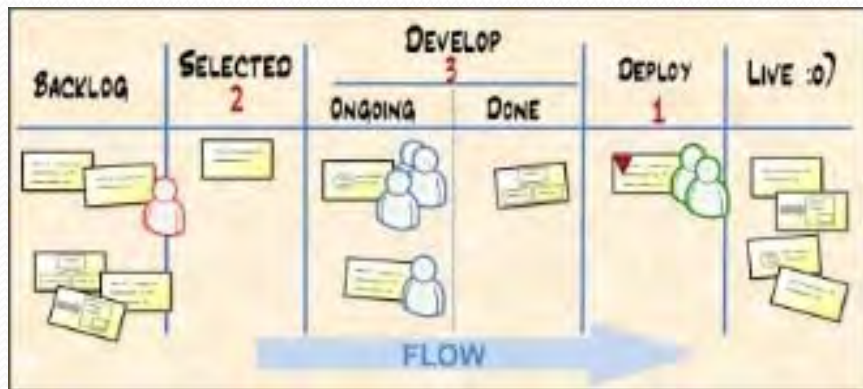
CUMULATIVE FLOW DIAGRAM

LEAD TIME & CYCLE TIME

PUTTING IT ALL TOGETHER

Nightingale, C. (2015). *Seven lean metrics to improve flow*. Franklin, TN: LeanKit.

Lean & Agile Org. Measures

8. CAPITAL INFRASTRUCTURE AGILITY

1. STRATEGIC AGILITY

7. ORGANIZATION DESIGN AGILITY

2. CULTURAL AGILITY

6. IT INFRA-STRUCTURE AGILITY

3. PROCESS AGILITY

5. TECHNOLOGY AGILITY

4. PRODUCT & SERVICE AGILITY

Labels around chart: Objective, Commercial, Leased, Global, Offshoring, Outsourced, Telepresence, Virtual, Light Governance, Cross Functional, Self Organizing, Organic, Networked, Flatter, Narrow, Workflow, Video, Cellphone, Email, Text, Internet, Intranet, Mobile, Cloud Computing, Reusable, Commercial, Microservices, Open Source, Software, Throwaway, Inexpensive, Reconfigurable, Flexible, Modular, Smaller, Fewer, Automation, Improving, Disciplined, Lightweight, Operational, Iterative, Continuous, Improvement, Empowerment, Communication, Collaborative, Purpose, Talent, Leadership, Relationships, Customer Focus, Change-Adapt, Time Based, Vision-Strategy, Experiments

31

Rico, D. F. (2016). *Agile businesses*: *A metamodel of lean and agile organizational strategies*. Retrieved March 1, 2016, from http://davidfrico.com

Lean & Agile Success Factors

- □ Everything begins with lean & agile principles
- □ Next step is smaller portfolio & simpler designs
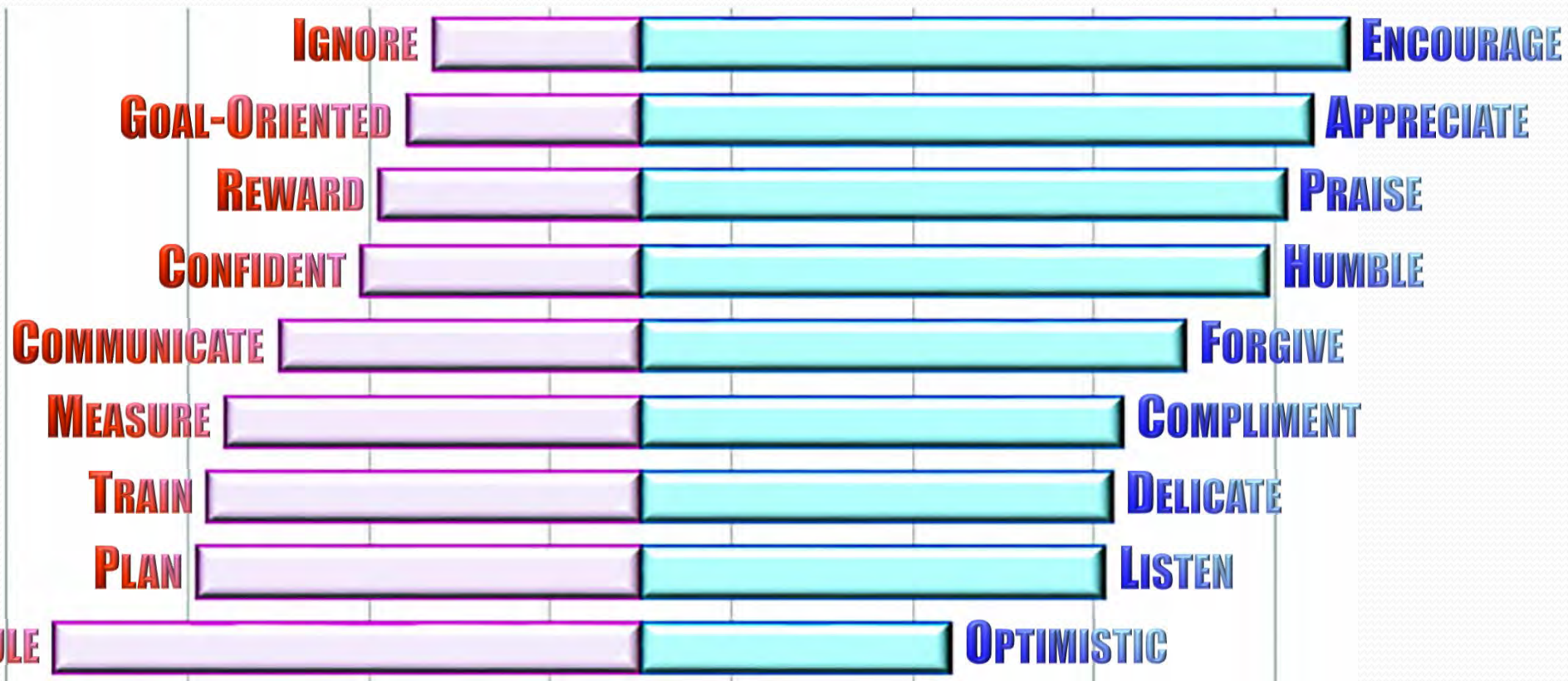- ☞ □ Final step is modular interfaces & E2E automation

Kim, G., Debois, P., Willis, J., & Humble, J. *The devops handbook*: *How to create world-class agility, reliability, and security in technology organizations*. Portland, OR: IT Revolution Press.
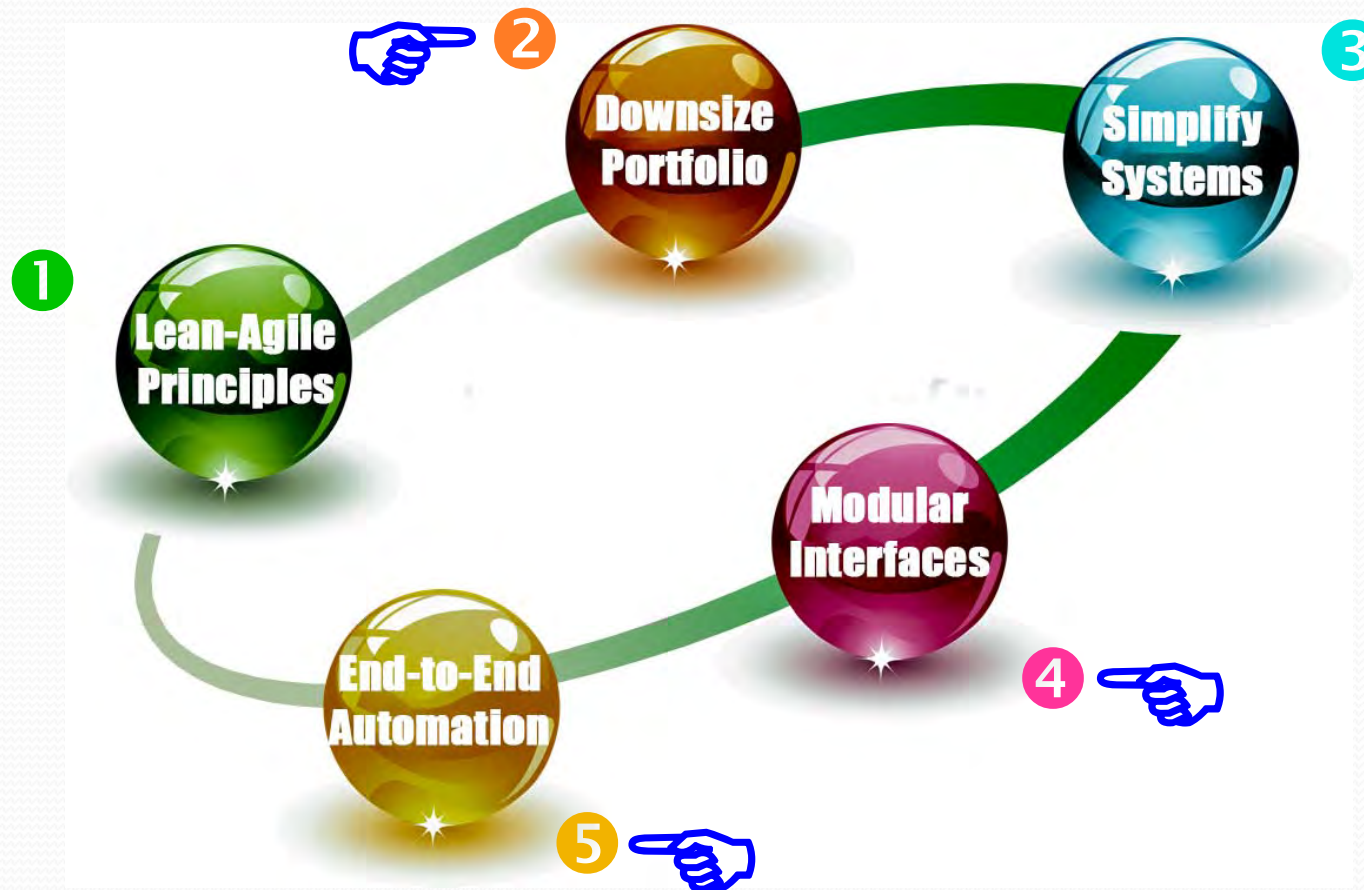
GLOBAL LEADERSHIP Study

- □ Recent U.S. study on desired leadership attributes
- □ Rank ordered desired vs. actual leadership qualities
- ☞ □ Focus on listening skill, respect, appreciation, & value

Henson, V. (2016). *Dale carnegie training*: *Global leadership study*. New York, NY: Dale Carnegie Training.
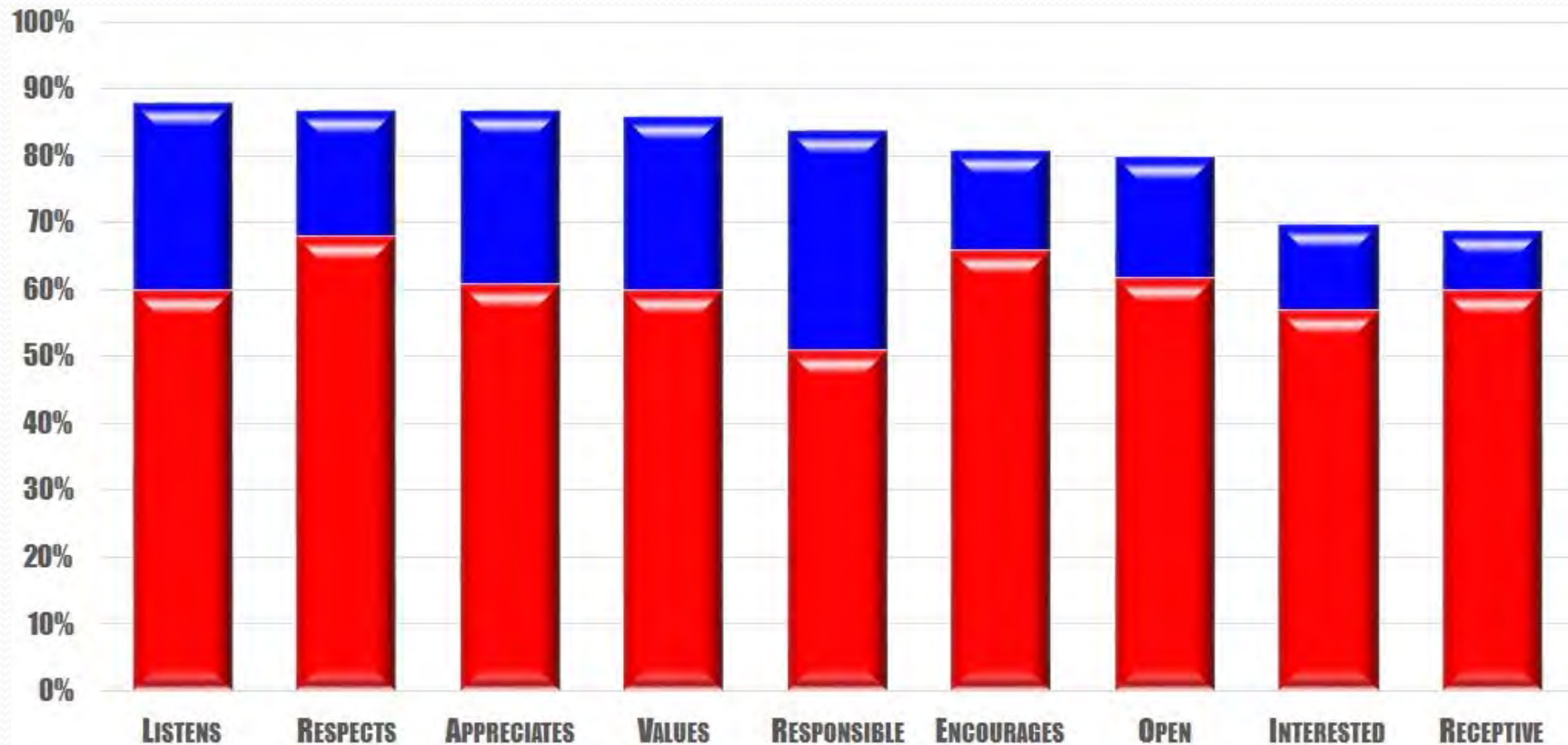
GLOBAL LEADERSHIP Study — Cont'd

- □ Also compared traditional vs. contemporary attributes
- □ Older ones based on traditional project management
- ☞ □ Today's leaders encourage, appreciate, and praise

Traditional	Contemporary
IGNORE	ENCOURAGE
GOAL-ORIENTED	APPRECIATE
REWARD	PRAISE
CONFIDENT	HUMBLE
COMMUNICATE	FORGIVE
MEASURE	COMPLIMENT
TRAIN	DELICATE
PLAN	LISTEN
SCHEDULE	OPTIMISTIC

Henson, V. (2016). *Dale carnegie training*: *Global leadership study*. New York, NY: Dale Carnegie Training.

Leadership Performance

76 VS **38**
Percent   Percent

High performers have twice as many successful strategic initiatives vs. low performers

31 VS **9**
Percent   Percent

High performers are three times as likely to have high organizational agility

57 VS **28**
Percent   Percent

High performers are twice as likely to have high alignment of projects to organizational strategy

Three Strategic Focuses That Drive Organizational Success

PEOPLE

Managing Talent and Change

High performers achieve significantly more successful strategic initiatives by effectively managing their project management talent. Furthermore, they demonstrate successful organizational change management, which is more effective with actively engaged sponsors.

2 times

Twice as many high performers have actively engaged sponsors compared to low performers.

PROCESSES

Project, Program and Portfolio Management Maturity

High-performing organizations fully understand the value of project management, have a project management office (PMO) and use standardized project management practices throughout the organization.

4 times

Four times more high performers have project, program and portfolio management that is highly mature compared to low performers.

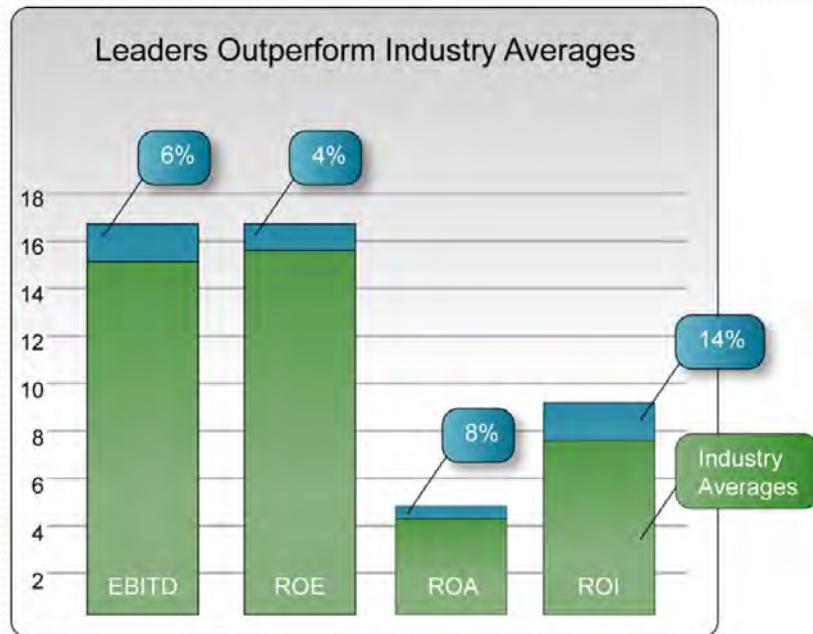### OUTCOMES

Benefits Realization

Organizations need to focus on effectively establishing, measuring and communicating the intended benefits of projects and programs.

5 times

Five times more high-performing organizations have highly mature benefits realization compared to low-performing organizations.

Langley, M. A. (2014). *High-cost of low performance*: *Pulse of the profession* (*a snapshot*). Newtown Square, PA: Project Management Institute.
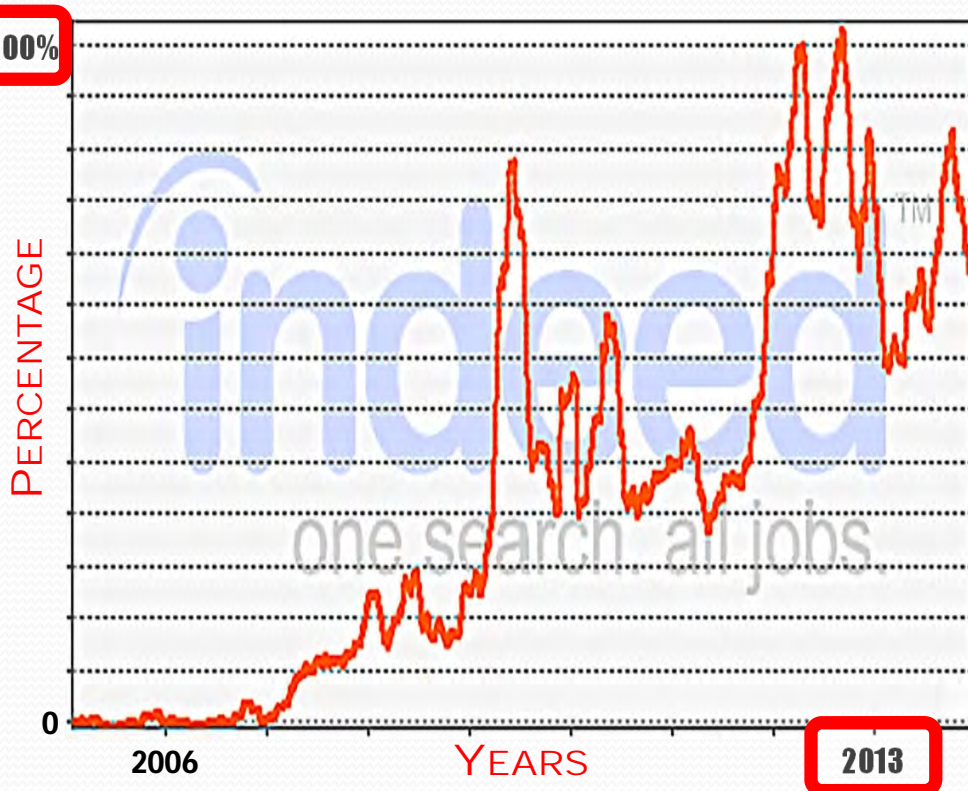
Leadership Business Benefits

- Study of 15 agile vs. non-agile Fortune 500 firms
- Based on models to measure organizational agility
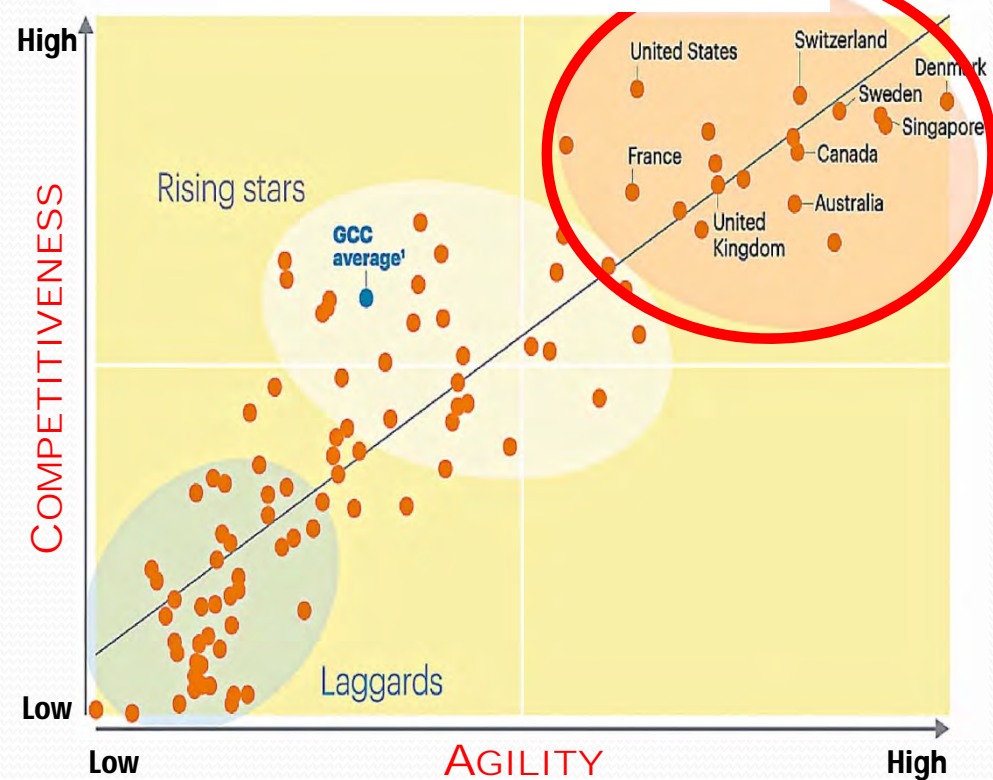- ☞ Agile firms out perform non agile firms by up to 36%

Hoque, F., et al. (2007). *Business technology convergence. The role of business technology convergence in innovation and adaptability and its effect on financial performance.* Stamford, CT: BTM Corporation.

Leadership National Benefits

- ☐ U.S. gov't agile jobs grew by 13,000% from 2006-2013
- ☐ Adoption is higher in U.S. DoD than Civilian Agencies
- ☞ ☐ GDP of countries with high adoption rates is greater

GOVERNMENT AGILE JOB GROWTH

GOVERNMENT COMPETITIVENESS

Suhy, S. (2014). *Has the U.S. government moved to agile without telling anyone*? Retrieved April 24, 2015, from http://agileingov.com
Porter, M. E., & Schwab, K. (2008). *The global competitiveness report*: *2008 to 2009*. Geneva, Switzerland: World Economic Forum.

Lean & Agile Leadership Summary

- ☐ 21st century leadership is about empowerment vs. ctrl
- ☐ Flatter organizations of talented self-organizing teams
- ☐ Lean-agile ideas to constantly adapt to market needs

- **FLATTER** - *Develop flatter enterprises, organizations, agencies, non-profits, firms, etc.*
- **BOTTOMS UP** - *Deploy bottoms up visioning, missioning, strategic/tactical planning, etc.*
- **VISIONING** - *Continuously proliferate jointly developed visions, missions, strategies, etc.*
- **DELEGATE** - *Delegate authority and responsibility to lowest operational level possible.*
- **LEAN THINKING** - *Promote small batch sizes, low work in process (WIP), Kanban, etc.*
- **ADAPTABILITY** - *Continuously sense and respond to ever changing market needs.*
- **MICRO THINKING** - *Use small throwaway micro batches, products, services, timelines, etc.*
- **FLEXIBILITY** - *Use flexible and inexpensive processes, products, suppliers, services, etc.*
- **EMERGENCE** - *Allow business, product, and service offerings to evolve, emerge, grow, etc.*
- **SELF ORGANIZATION** - *Develop loose coalitions of inter-networked teams vs. hierarchies.*
- **CONVERSATIONS** - *Foster open, informal communications, dialogues, conversations, etc.*
- **BALANCE** - *Strike a balance between organizational commitments and creative pursuits.*
- **AGILITY** - *Find balance of flexibility and discipline for creative, high-quality solutions.*
- **IMPROVEMENT** - *Create a culture of continuous improvement, learning, perfection, etc.*
- **MASTERY** - *Foster an environment of learning, education, self-mastery, perfection, etc.*
- **COLLABORATION** - *Integrate market, customer, and voice, feedback, participation, etc.*
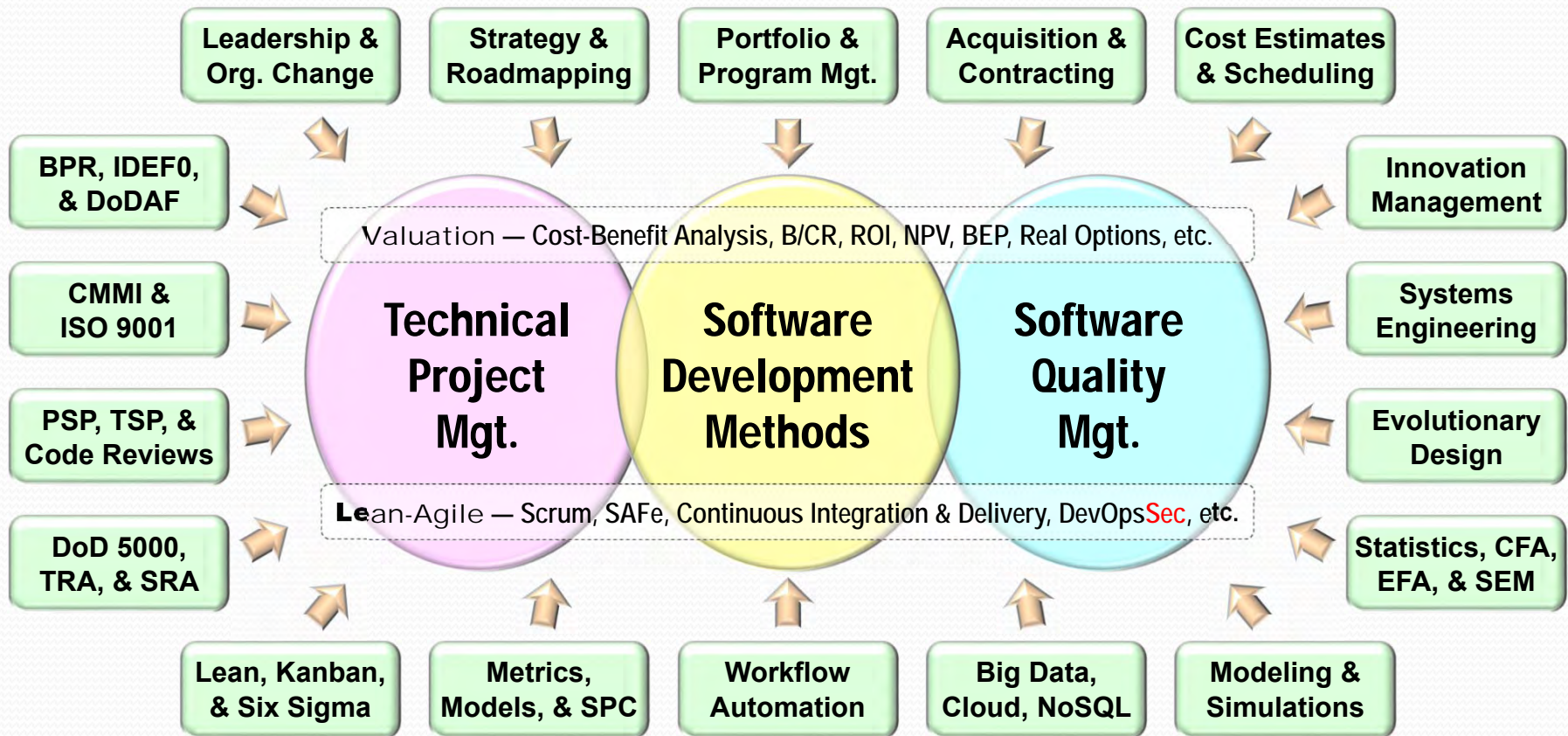
Leadership — Mahatma Gandhi
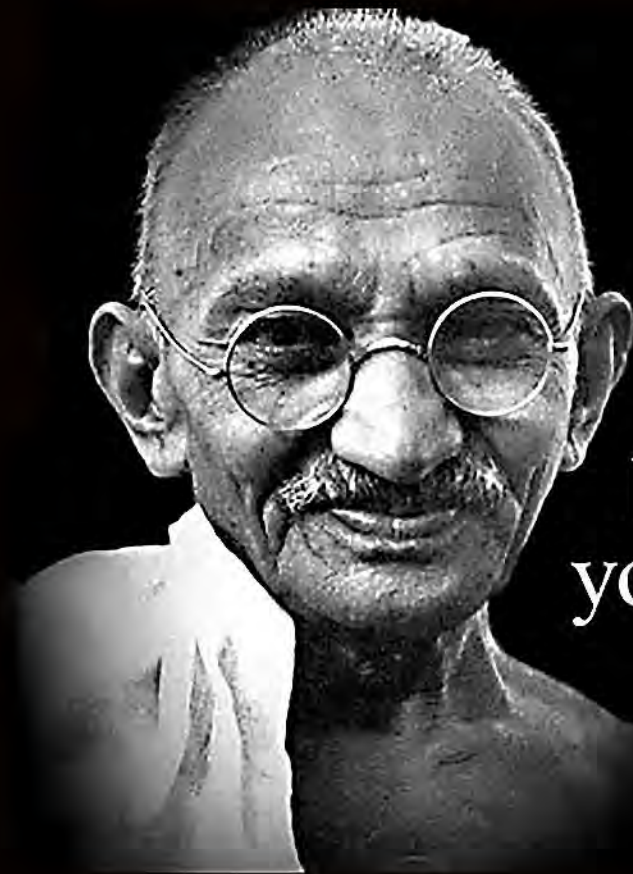
GANDHI

You must
be the change
you wish to see
in the world.

Dave's PROFESSIONAL CAPABILITIES

Leadership & Org. Change	Strategy & Roadmapping	Portfolio & Program Mgt.	Acquisition & Contracting	Cost Estimates & Scheduling

BPR, IDEF0, & DoDAF

Innovation Management

Valuation — Cost-Benefit Analysis, B/CR, ROI, NPV, BEP, Real Options, etc.

CMMI & ISO 9001

Systems Engineering

Technical Project Mgt.

Software Development Methods

Software Quality Mgt.

PSP, TSP, & Code Reviews

Evolutionary Design

Lean-Agile — Scrum, SAFe, Continuous Integration & Delivery, DevOpsSec, etc.

DoD 5000, TRA, & SRA

Statistics, CFA, EFA, & SEM

Lean, Kanban, & Six Sigma	Metrics, Models, & SPC	Workflow Automation	Big Data, Cloud, NoSQL	Modeling & Simulations

STRENGTHS – Communicating Complex Ideas • Brownbags & Webinars • Datasheets & Whitepapers • Reviews & Audits • Comparisons & Tradeoffs • Brainstorming & Ideation • Data Mining & Business Cases • Metrics & Models • Tiger Teams & Shortfuse Tasks • Strategy, Roadmaps, & Plans • Concept Frameworks & Multi-Attribute Models • Etc.

35+ YEARS IN IT INDUSTRY

- **Data mining.** Metrics, benchmarks, & performance.
- **Simplification.** Refactoring, refinement, & streamlining.
- **Assessments.** Audits, reviews, appraisals, & risk analysis.
- **Coaching.** Diagnosing, debugging, & restarting stalled projects.
- **Business cases.** Cost, benefit, & return-on-investment (ROI) analysis.
- **Communications.** Executive summaries, white papers, & lightning talks.
- **Strategy & tactics.** Program, project, task, & activity scoping, charters, & plans.

PMP, CSEP, FCP, FCT, ACP, CSM, SAFE, & DEVOPS