



MAINTAINING MOMENTUM IN A REMOTE, AGILE WORLD



WORKING FROM HOME, THE NEW NORMAL?

The Coronavirus pandemic has created an industry-wide disruption in the way people work. Telecommuting used to be a luxury. Now it's become necessary to maintain business continuity. Time will tell if this is our new normal, but for the time being, it's the only way to get the job done. And the key to success during these unprecedented times is going to be transparent and measurable remote work.

The way we're working may have changed, but the demands of the market haven't. Delivering value early remains critically important. The ability to get feedback and deliver solutions that our customers want to buy remains a competitive differentiator. And maintaining Business Agility is as important as it ever was.

So, what happens when you're in the middle of an Agile Transformation, or delivering products in an Agile

environment, and you suddenly need to go remote? The answer is more than just video conferencing and instant messaging.

You're going to need an integrated operating model that provides the clarity of outcomes, the cadences of accountability, and the metrics necessary to ensure that everyone is on the same page and moving toward your critical business objectives.

Keeping everyone aligned and on the same page during critical phases of your Agile Transformation is core to the LeadingAgile way of doing business and how we lead Transformation. And just because your teams have been thrust into a long-distance working environment doesn't mean that we plan on compromising any of that.

Organizational Transformation is essential to your business, so you can't

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put change on hold.

How you choose to lead change during these next few weeks is going to be critical. And the way you choose to organize, plan, manage, and communicate work—it's going to matter when it comes to your ability to effectively navigate this remote world and maintain momentum toward achieving your organizational goals.

This paper is laid out in three sections:

THE FIRST IS ABOUT HOW TO ORGANIZE, PLAN, MANAGE, AND COMMUNICATE WORK AT SCALE

THE SECOND ADDRESSES THE THINGS YOU'LL NEED TO BE INTENTIONAL ABOUT TO SUCCEED REMOTELY

THE THIRD COVERS THE AREAS OF TOOLING YOU'LL NEED TO BECOME PROFICIENT IN TO REDUCE FRICTION

As the events of the COVID-19 pandemic continue to unfold, many of you may be feeling angst and uncertainty about the future, your ability to adapt, or whether it's prudent to invest in a new change initiative at this time or not. We decided to write this white paper in an effort to assuage any fears and ease the feeling of unrest that many of our clients and potential clients may be feeling.

The goal of this white paper is to introduce you to/refamiliarize you with our Change Model and approach to Agile Transformation. Over the years there has been a ton of intentionality and resiliency built into our model and the way that we do business. As a result, we are well-prepared to handle an Agile Transformation—even in the absence of co-located teams.

The reality is that no Agile Transformation is ever completely built around co-located teams and our approach has proven to be successful over distance—and at scale—by applying the tools and techniques outlined in this paper to our existing model.

Now isn't the time to put your business objectives on hold. Now is the time to adapt and overcome so that you're ready to hit the ground running when the world finally defeats COVID-19 and is ready to get back to normal—even if that means a new normal.

As always, let us know if you have any questions about the contents of this paper, our Change Model, or our approach in general. We're happy to help you in any way that we can.



APPLYING OUR CHANGE MODEL & **APPROACH** TO REMOTE WORK

HOW YOU ORGANIZE THE WORK MATTERS

Transformation work is iterative and incremental, and it requires both teams and collaboration. What's really important is that the teams doing the work have clarity around what they're building, understand acceptance criteria, and can get to a clear definition of done at the end of a sprint/release. Structuring the Transformation so we have this level of clarity is a critical success factor for getting and maintaining alignment and measuring progress—especially when working remotely—in the midst of a pandemic.

Right now, as a Nation, we're heading into some uncharted waters as we deal with COVID-19, and we're going to have to build systems that are capable of being resilient and managing uncertainty as the world around us is shifting.

The next several paragraphs outline our approach to building the kind of system

you're going to need to weather the shift to a remote, Agile world.

Transformation Planning

So how do we make a plan to lead Transformation? Our white paper, *Agile Transformation*, describes the Why, What, How, and Who of our Transformation approach. At a high level, it first requires agreeing on the business drivers for the Transformation and designing an organization that is capable of actually achieving them. Then identifying the impediments to putting the appropriate teaming structure, governance model, and metrics in place to help you build the type of organization that can achieve your desired business results.



THE FOUR QUADRANTS

We use the Four Quadrants to explain how to orient the organization from where it is today to where it needs to be in the future. It helps us understand the constraints that drive decision making

around process and how we can change these constraints over time to give us more flexibility in achieving our goals. The Four Quadrants give us a way to talk about where you are today, where you need to be in the future, and how we'll get there over time.



APPLYING THE FOUR QUADRANTS

The Four Quadrants are an effective tool for getting consensus around where an organization, a division, a product line, or a team is today and comparing that to where it needs to be in the future. It provides context not only for understanding where you are and where you want to go, but also for discussing the organizational impediments that will make the journey difficult.

Often, you get stuck in one quadrant because you don't have the trust, haven't moved the people, have an overwhelming amount of technical constraints, or organizational dependencies that keep you locked in place.

Understanding this will help you define a process you can do today, a process you'd like to adopt in the future, and a plan for creating the conditions necessary to make those changes a reality.



BASECAMPS

A Basecamp is simply an intermediate state along your Transformation journey. Direction is set and you're guided by the Four Quadrants, while the Basecamp is an intermediate step along the way that allows you to measure progress, claim an intermediate victory, and possibly rest and refuel for the next leg of your Transformation.

In times of volatility these intermediate steps also give you a chance to reevaluate the value of the continuing the journey. Perhaps the focus and attention need to shift to a different part of the organization.

Tracking to Basecamps means you're delivering value frequently and creating optionality to do the next highest value organizational improvement.



EXPEDITIONS

Expeditions are groupings of teams that will make the Transformation journey together. They consist of all the pieces of the organization necessary to fully implement all the pieces of the model.

An Expedition should also have all the structural elements necessary to deliver the product, coordinate and overcome dependencies, and make prioritization

decisions and economic tradeoffs. The structure has to operate in a defined governance model to coordinate and manage the flow of value at each tier of the enterprise and across the entire value stream.

Lastly, an Expedition will have a metrics and tooling approach that allows the enterprise to measure, control, and truly evaluate if the Transformation is yielding the business results it promised.



OUTCOMES

Achieving a Basecamp produces measurable results for the business. For example, the objective for an Expedition at Basecamp 1 is that they can predictably plan and deliver a release for the organization.

In order for an Expedition to be able to consistently do that, certain conditions must exist in the organization. Teams must be stable, the governance model must be adhered to with discipline, teams have to learn to get clarity in the backlog so they can plan and deliver a sprint, then they must be able to create sufficient clarity in the backlog to plan a release.

Creating these conditions is accomplished through achieving a series of outcomes. An outcome is a verifiable condition that must exist in order to

achieve the objectives of a Basecamp. As each Expedition is readied, the outcomes that must be completed and the activities to achieve them are built into a plan. This is not an activity-based plan though as success is not achieved by performing the activities – it's achieved by verifiably producing the outcome in the organization.



METRICS

Clear and compelling metrics demonstrate effectiveness. If you can demonstrate effectiveness in a virtual world, your Transformation will flow as if you were still in the office. Being able to explicitly measure what outcomes are achieved, which Expeditions are moving to a particular Basecamp, and ultimately being able to tie those metrics back to the business goals you are trying to achieve is the fundamental key to success.



HOW YOU MANAGE THE WORK MATTERS

Ultimately, moving to a more Agile way of doing business impacts everyone in the company. So it's critical to the success of your Agile Transformation that we have support from key leaders and team members who represent every level of the organization. This becomes even more important in a remote world to ensure that the needs of every level of the organization are being considered as we continue to do our work and react to new information as it becomes available.

At the end of the day, having the right managing structures in place is going to be imperative to the success of your Agile Transformation. And there's nothing about the new, remote, Agile world that means that we can't still build these managing structures and have them drive the success of your Agile Transformation.

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EXECUTIVE STEERING COMMITTEE

At the beginning of every Transformation the LeadingAgile team will meet with your executives and key stakeholders to craft a set of goals and objectives to guide your Transformation. We call the first event a Transformation Workshop. Following that we will work with you at the beginning of the engagement to identify an Executive Steering Committee (ESC). The ESC is made up of your most senior people involved in funding and identifying the goals and outcomes of the engagement.

Your ESC will meet at the beginning of the engagement and then on a recurring basis thereafter, typically every 30 days. The purpose of these meetings is to make sure everyone is in close alignment around what we're going to accomplish, who needs to be involved, and what it's going to take to get there. The outcome of the ESC meeting is an updated collective point of view on the Expeditions and Basecamps, and a plan to create the conditions that will enable the Transformation to continue to move forward.



TRANSFORMATION LEADERSHIP TEAM

We will also help form one or more Transformation Leadership Teams (TLT)

to elaborate on the goals, objectives, and support the communications and activities to guide your Transformation. Depending on the size of the organization and the complexity of the Transformation, a TLT will provide support and leadership for one or more Expeditions. A TLT is made up of senior leadership and any other managers or team members that are necessary to collaborate with the LeadingAgile consultants to support achieving the outcomes of the Expedition.

The TLT will meet on a recurring basis, typically every two weeks. This meeting gives the client's leadership team a regular opportunity to speak with the LeadingAgile team, to evaluate progress, understand any impediments to the Transformation, hold each other accountable, and make any course corrections based on what we've learned since the last meeting.

These regular meetings ensure that alignment is maintained and give regular intervals to test for where things have gotten off track. They also enable dynamic changes on a frequent basis based on market, company, or environmental factors.



TRANSFORMATION EXECUTION

An outcomes-based plan is a plan that plots the outcomes necessary

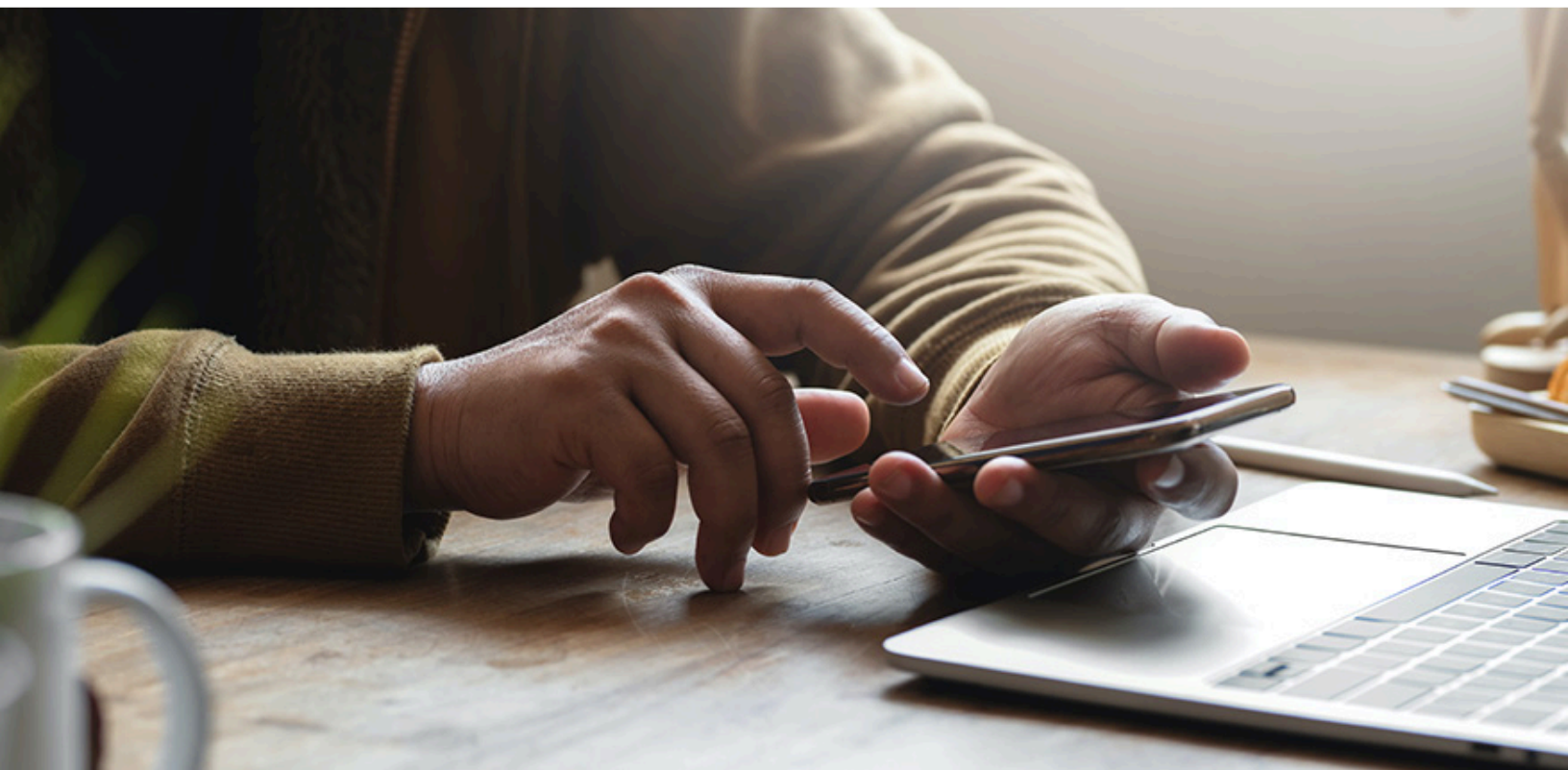
to move an Expedition through its planned Basecamps that will achieve the targeted business goals. The organization uses outcomes-based plans to align all the stakeholders to move the organization forward with the Transformation.

Planning with outcomes in mind requires an understanding of the outcome, the activities needed to achieve the outcome, the deliverables to sustain the outcome, and a specific way to measure improvements. The plan takes into account where the teams are from the start and where they need to be. The outcomes-based plan allows for sponsors, stakeholders, and the LeadingAgile team to understand what outcomes the group is driving toward, the activities required to deliver against those outcomes, and ultimately how to

identify and remove impediments to the achievement of those outcomes.

When put together, the ESC, TLT, and the outcomes-based plan align people so that they know where they're going and helps to create safety for everyone on the journey. Successfully achieving outcomes by building out knowledge and demonstrating competence creates momentum for change both within the teams who are Transforming and across the broader organization.

Leveraging the ESC and TLT meetings creates the frame for us to situationally tailor the work that we're doing to help that particular group achieve that particular outcome while maintaining clarity across the organization. The desired outcomes won't typically change from Basecamp to Basecamp, but the



plan of attack for achieving those outcomes is always uniquely tailored to the context of the organization. By leveraging the ESC and TLT to execute the plan, we create the ecosystem within our clients' organizations so that when we leave, they can sustain those outcomes.

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EXECUTING AN OUTCOMES BASED PLAN

We now get to how to manage the execution of Transformation. We have a 5-step process we use to ensure alignment within the Expedition and across stakeholders while staying true to the goals and drivers of the overall transformation. Disciplined attention to executing the outcomes-based plan is necessary to avoid the failure mode of just showing up and coaching, or running activities that don't actually produce a result. Directly involving the ESC and the TLT(s) in collectively aligning the plans and creating the clearing and conditions for the change to stick is necessary in any organization at scale and is critical when any of the stakeholders are distributed.

HOW YOU

COMMUNICATE

THE WORK MATTERS

Clear, concise communication is another key factor in a successful Agile Transformation. But clear and concise communication is something that becomes more difficult when teams are geographically dispersed. However, we have a robust approach to effectively communicating at scale that's viable for both co-located and remote teams and works within the framework of the planning and structure we've already implemented.

CLEAR, CONCISE COMMUNICATION IS ANOTHER KEY FACTOR IN A SUCCESSFUL AGILE TRANSFORMATION



PREPARE

As the organization prepares to move into execution, the Coaching Team will work the ESC and TLT, respectively, to ensure alignment of the entire Expedition to the outcomes-based plan and Transformation roadmap. Clear, concise communication is another key factor in a successful Agile Transformation. But clear and concise



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The Coaching Team also ensures that all necessary modifications have been made to the critical LeadingAgile artifacts, such as the Playbook, to ensure that everyone has access to the most recent materials and Transformation directives.



SOCIALIZE

At each 30-day planning event, the Coaching Team reviews the upcoming outcomes-based plan with the TLT, and they co-create an Expedition communication plan. This communication plan describes how the TLT will ensure organizational clearing exists so the plan can move forward. The TLT formally communicates the plan to all of the Expedition participants and stakeholders.

The Coaching Team evaluates the Expedition's readiness, communicates obstacles on the horizon with the TLT, and discusses options for dealing with them as they arise during Expedition execution.

Throughout the engagement, The Coaching Team will work with the ESC and TLT members, respectively, to create safety for themselves to operate with effective political, strategic, and tactical partnership.



TAILOR

Leading up to the execution of the next outcomes, The Coaching Team will align to the needs of the Expedition and the outcomes-based plan. The Coaching Team will establish a metrics collection plan, assessment cadence, and review (if available) initial Expedition team assessments. The Coaching Team also plans, clarifies, schedules, and commits to the Expedition iteration plan for the next two weeks.



IMPLEMENT

In alignment with the timing agreed to with the TLT, the Coaching Team executes the iteration plan and coaching teams on practices that support progress toward achieving Transformation outcomes and business results. As coaching is conducted and artifacts are updated, the artifacts are updated in the customer Playbook so that it maintains consistency.

The Coaching Team assesses the Expedition's progress and will present

recommendations, justifications and requests to the TLT for help removing impediments that block progress to execution or reduce the safety of the Coaching Team to effectively operate, or both.



REINFORCE

The Coaching Team will publish and review metrics to objectively determine the Transformation impact on both business and delivery results. The Coaching Team will also perform and review assessments. In addition to the assessments, the Coaching Team will review the metrics and outcomes-based plans while inspecting and adapting plan priorities to achieve outcomes in context. Progress is reviewed with the TLT, and plan adjustments are adopted to continually progress toward outcomes.



PRINCIPLES FOR MANAGING REMOTE WORK



PRIORITIZE STRUCTURE, CADENCES, & ALIGNMENT

A few of the biggest pitfalls of remote work is the breakdown of human interaction, a lack of intentionality around the frequency and purpose of the interactions we do have, and getting the right people to interact with one another so that we can effectively move the business in the direction it wants to go.

This leads to isolation of the team members, ambiguous meetings, infrequent updates and feedback, a lack of alignment, lower productivity, and ultimately to less value being delivered to the business and the customer.

But if you refer back to our model, the managing structures, meeting cadences, and desired outcomes are explicit. The way we measure progress and get feedback is baked into the way we operate. No one is left having to invent a new way of working, figuring out a different set of working agreements, or attempting to decipher the right frequency with which to have meetings.

No one will need to determine a new set of priorities or business objectives either. It's all been outlined and agreed upon at the onset.

When you adhere to the guidance from the previous sections of this white paper, prioritize getting the ESC, TLT, and Coaching Teams to meet and interact with one another, and focus on the outcomes-based plan and associated metrics—the fact that your teams are disbursed isn't going to slow you down.

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LEAN INTO RELATIONSHIPS

LeadingAgile's client engagement approach is rooted in creating strong relationships. After all, our clients have entrusted us with guiding them through their Transformations. This approach doesn't waiver, it's something we're committed to doing both in person and in remote environments.

Physical presence can be comforting and motivating; however, this doesn't have to be limited by distance. In fact, studies have shown that relationship quality and performance is more closely tied to perceived proximity than it is to actual proximity. So how do we ensure that we're able to leverage the relationships within the organization?

Our change approach includes getting key client personnel aligned and rallied to remove impediments and to strategize on creating and sustaining the gains of the Transformation. We help our client teams stand up an Executive Steering Committee, a Transformation Leadership Team, and an Agile Transformation Office. Transformation success is hugely dependent on adoption, which is driven by resilient relationships with change agents.

Creating resilient relationships remotely entails demonstrating empathy and continuing the spontaneous touchpoints that happen naturally (e.g. voice calls, text, Skype, Zoom) when co-locating with our clients.

LEVERAGING TOOLS FOR REMOTE COLLABORATION

Our clients run the gamut when it comes to industry. In the coming weeks or months ahead, some of them may still need to operate in settings that are completely in-person, such as clients in the manufacturing and lab work industries. Others may need to be fully remote; like the software development industry. Additionally, their level of readiness and ability to deal with the effects of a global pandemic or other crisis situations is certainly going to differ as well.

Regardless, we meet our clients wherever they are on these spectrums and can collaborate to land on the technology and techniques for remote collaboration that are most effective for their particular situation. However, here's a list of some of the tools that we already have in our arsenal to support our clients, and some best practices for how we use them in real-world scenarios.



TELECONFERENCING: ZOOM (ZOOM.US)

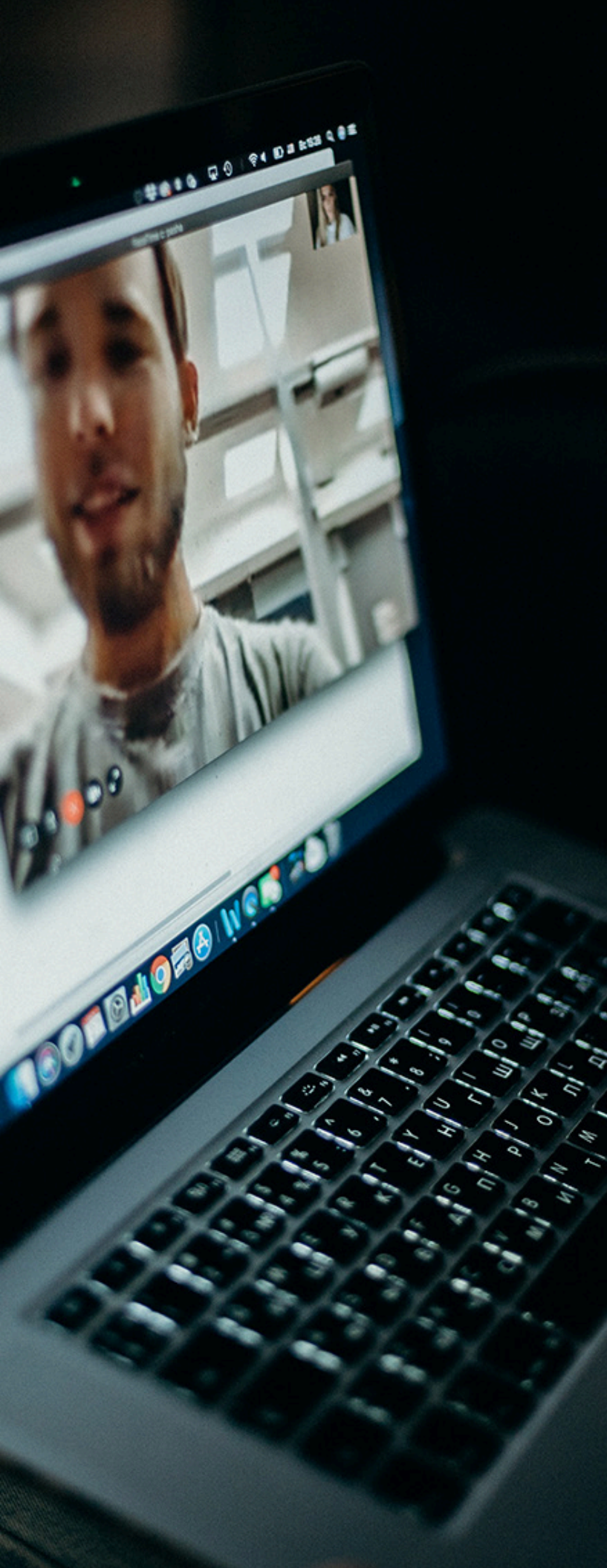
As our go-to tool for video conferencing, conference calls, and remote facilitation of workshops, Zoom offers a number of useful features that eclipses just audio and video communication.



For Coaches

Screen Sharing allows you to drive your presentation content as you would in a meeting room and ensure that everyone is seeing the same thing. Presenters can switch back and forth between presentations and whiteboarding tools to further recreate the in-room experience.

Zoom helps to make facilitation easier with its advanced tools. Many of these are extremely useful such as polls, remote control of the presenter's screen, non-verbal feedback, screen annotation, and file sharing.



For Teams

Standups, Planning Meetings, Retrospectives, and all other team meetings can be held in Zoom. Leveraging audio, video, and screen sharing helps to re-create the sense of being in the room together.

Zoom is a great tool to help recreate the team room environment. We all know that co-located teams are more effective and Zoom can help keep that alive while remote. Create a Team Room in Zoom that folks join when they start their day. Team members will come and go throughout the day, but the Team Room functions as a home base.

Tips for Success

Encourage either everyone to be on video—or no one—to ensure everyone is on the same playing field.

Explore using breakout rooms for remote workshops. Breakout rooms allow participants to be split into separate calls so that small groups can work together without having to reconnect.

Make sure all of your employees are able to connect via video (some may need an external camera if their computer does not have one built in).



GROUP DISCUSSIONS: SLACK

There will always be a use case for email, but for written discussions, Slack is our go-to tool. It supports “1 to 1”, “1 to many” and “many to many” conversations with its channel and direct message features. Slack also has a multitude of “apps” that connect to whatever other productivity tools you are using to make scheduling and meeting a breeze.



For Coaches

Create channels for topic discussions to allow those that are interested to join and participate as they choose.

Keep tabs on your teams when you aren't in workshops by creating groups. Creating a group for you and your team allows them to ask questions and have discussions in a dedicated space.



For Teams

Having a team group is a great way to stay connected to your team when not in a meeting. In a physical team room, we can see when folks come and go, but that is much more difficult when remote. Set team norms like posting to the group when team members leave for lunch, run an errand, or step away for a period so others know not to expect an immediate response.

Creating a public team channel allows co-workers not on your team to hop in and ask a question, then leave when they get an answer, much like they would in an office.



Tips for Success

It's a good idea to establish some ground rules as to how your organization is going to use channels vs group discussions. This will help make it clear what types of discussions should be in open forums vs select team members.





GROUP COLLABORATION: MIRO (MIRO.COM)

Miro is a virtual collaboration space. Like a whiteboard but better, it allows users to create or display any type of media and create collaboratively with any number of people at one time.



For Coaches

Miro has built in templates for a variety of Agile Workshops. In the extensive library you will find “Journey Mapping,” “Customer Persona,” “User Story Map,” “Product Roadmap,” and lots more.

Quicklinks within the boards make it easy to direct your participants to the different areas of the whiteboard where you want them to focus.



For Teams

Use the Miro in the same way you would use a whiteboard in your team room. Stop team discussions from becoming unproductive by starting up a whiteboard and inviting the team in to collaborate.

Start your discussion from a pre-existing diagram by uploading your own images into a board. Team members can then draw right on top of it as a way to come to a shared understanding of what the image is trying to convey.



Tips for Success

The power of this tool is the collaborative nature, so encourage everyone to log into the board. Don't screenshare the board via conference call.

Even if the meeting isn't collaborative, having people view content directly on the board allows them to see it in high resolution, zoom in if needed, and navigate on their own if they need to go back or refer quickly to other content on the board.

Set up your boards ahead of time. Think about it like making printed copies of an exercise or preparing a slide deck. Working this out in advance will make your workshops run smoothly. You can even turn these workshops into templates to run again later.

Facilitate breakouts by creating a frame for each group. When you come back together, everyone can see what everyone else did by navigating to that section of the board.





TRANSFORMATION PLANNING: NAVIGATOR

Navigator is a custom web application designed to manage outcome-based planning and execution within the PSTIR Framework. It enables teams and leaders to see and manage prioritized Outcome Based Plan (OBP) outcomes and their associated activities. Team assessment results can be recorded in the tool providing a view of progress toward their outcomes during execution. It is ideal for outcomes-based planning with remote and distributed teams.



WHITE BOARDING: TABLETS

Tablets can be an indispensable tool when it comes to remote collaboration. Touch screen devices, combined with tools like Miro, allow for virtual whiteboard sessions that can dynamically allow many participants to work a problem together. Back to the question, “Will anything ever be as good as a whiteboard”? The answer is yes. Only one or two people can write on a

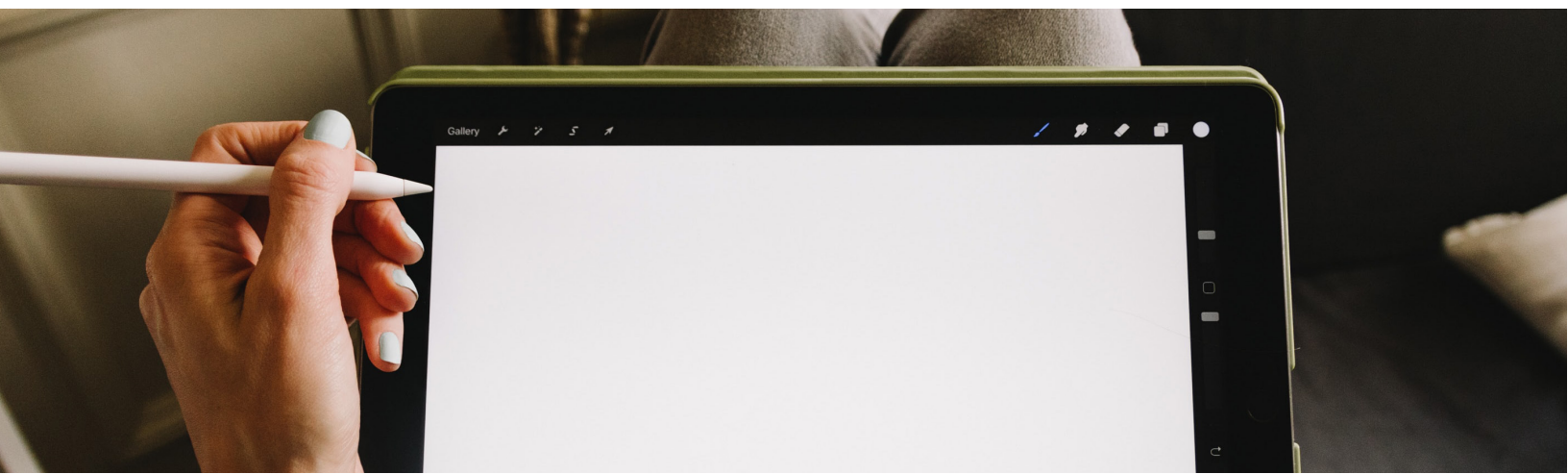
physical whiteboard at the same time. Those constraints are removed when collaborating on a digital whiteboard. High performing teams will dance as they co-create. We’ve seen it happen – a digital whiteboard can be faster than a physical one.

Missing the feel of the whiteboard marker? The Miro app for tablets is designed to support pencil/pen devices that connect to your device. In addition to using the shapes in the tool, you can also freestyle with your pencil to help bring focus or add clarity much like you would at a whiteboard.



DROP-INS, TOUCHBASES: TEXT ON YOUR PHONE

While there isn’t any reason to go into detail on the features of a phone, we’d be remiss to exclude it from the list. In many cases it can be the most underutilized tool we have for on-the-fly collaboration. As bandwidth in certain areas starts to become strained, leveraging the mobile phone network can help to offset the increasingly heavy internet usage.



CONCLUSION

In an ideal world we would always be able to get in a room and work together. But even under the best of conditions, and the most normal of times, this isn't always possible. When the whole world is battling a global pandemic, self-isolation and teleworking is not only critical for business continuity, but to protect the ones we love. Making sure that we are able to demonstrate value and quantifiably ensure progress is key to success.

Critical factors for delivering an Agile Transformation include:

- Having a strategy for how you organize the work and align around deliverables
- Having agreements for how to track progress, coordinate schedules, and align teams
- Establishing teams and cadences for holding people accountable
- Clearly communicating progress and collaborating with all necessary stakeholders

In addition, there are solid principles for managing in a remote world. Practices that we don't necessarily have to think about when we can walk down the hall and talk face-to-face, but become critical when we are managing relationships over distance and through technology. Finally, we live in a world with fantastic tools for staying connected when we aren't all in the same room. Leverage these tools, or other similar excellent products, to maximize communication and effectiveness in times where we can't all be in one place.



WHEN THE WHOLE WORLD IS BATTLING A GLOBAL PANDEMIC, SELF-ISOLATION AND TELEWORKING IS NOT ONLY CRITICAL FOR BUSINESS CONTINUITY, BUT TO PROTECT THE ONES WE LOVE.
