QUICK INTRO

PROFESSIONAL OVERVIEW

1989	1998	2006	2018	2020

INITIATIVE WINS   SYSTEMS THINKING   SCALE, ENTERPRISE STRATEGY, PRODUCT, TRANSFORMATION   INDUSTRY PATTERNS (50+ CLIENTS)

PERSONAL OVERVIEW

PETE ANDERSON

Partner, Business Agility

I serve a team of 140 consultants that are all passionate about Coaching, Product, and Agile Delivery. I'm a practitioner at heart and I love this stuff because it changes lives.

Mine included.

WHERE WE'RE HEADED TOGETHER

Quick Agenda

- What I Do, Who Buys The Work, & Who Is Impacted by It

- Success Factors of Transformational Work

- A Little Empathy Building for Our Partners

- A Real-Life Experiment with 30 Cross-Functional Leaders

- We'll Fly Thru a Bunch of Tools Together

- We'll Summarize the Outcomes of the Experiment

- I'll Challenge you to Apply What You Saw to Your World

- We'll Explore Questions if You've Got 'em

WHAT I DO
Help Folks Work in New Ways

	FROM	**TO**
	PROJECT	PRODUCT
Architect	Local solution	Larger ecosystem
Emphasize	Requested solution	Problems to solve, value
Decision-making	Siloed & short-term	Holistic & long-term
Attitudes	Scarcity/mistrust	Plenty/trust
Scope	Large & static	Small & continuously prioritized
Outcomes	Predicted	Measured
Time to value	Long	Short & continuous
Actual risk	Higher	Lower
Teams	Temporary	Persistent

WHAT I DO (CONT.)
Drive Far-Reaching Change

CLEAR WHY

Our first step is to get crystal clear on the 'Why' behind your transformation and how we'll measure success.

We will use that vision to gain alignment across our Sponsor(s) and Senior Leadership.

STRATEGY & APPROACH

The vision will feed our strategy. While we have a tried-and-true approach, we recognize that every large-scale change is different. One size does NOT fit all.

PEOPLE	PROCESS	TECHNOLOGY	DATA
THE FOUR I'S • Inform • Inspire • Invite • Invest **UPSKILLING** • Team > Individual **COACHING** • Leadership • Skills **HR** • Roles & Resp • Taxonomy Definition	**PROCESS REVIEW** • Strategic Prioritization • Planning Routines • Core Dev Practices • Funding • Risk/Compliance/Audit • Reporting & Governance **NEW WAYS OF WORKING** • Establish Product Toolbox	**ARCHITECTURE** • Current State • Desired State • Gap Analysis • Gap Prioritization **DEVOPS** • TDD • Source Code Mgmt • CI/CD **TOOLS** • Dev • Collaboration • Work Management **TAXONOMY DEFINITION**	**ASSESSMENT** • Data Health • Operational Metrics **STRATEGY** • How we'll approach data across the agency **TEAM DATA** • Business • Technical • User

WHO NORMALLY BUYS WHAT I DO
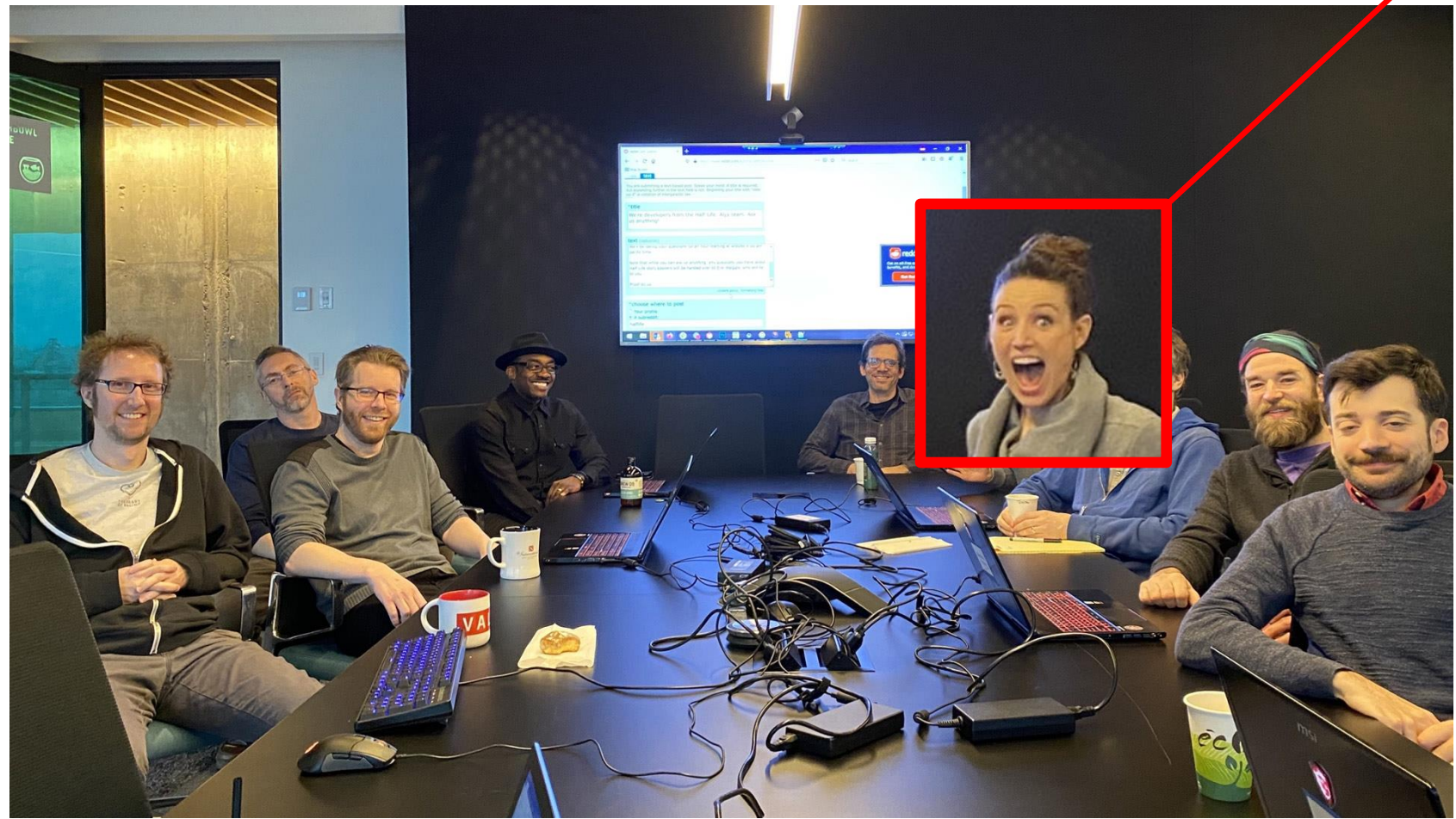
Senior Leaders Under Pressure

SPEED

QUALITY

EFFICIENCY

ROI

REVENUE

< COST

WHO NORMALLY GETS TRAINED
The Dev Teams / Delivery Org

PROBABLY THE PO

NEW WAYS
OF WORKING
WITH AN
EMPHASIS
ON DELIVERY

WHO IS IMPACTED BY THE WORK

Virtually Everyone

C-SUITE

HR

DATA TEAMS

CUSTOMER SERVICE

FINANCE

Product Management = Product Manager

Business

Tech

UX

L&D

OPERATIONS

SALES
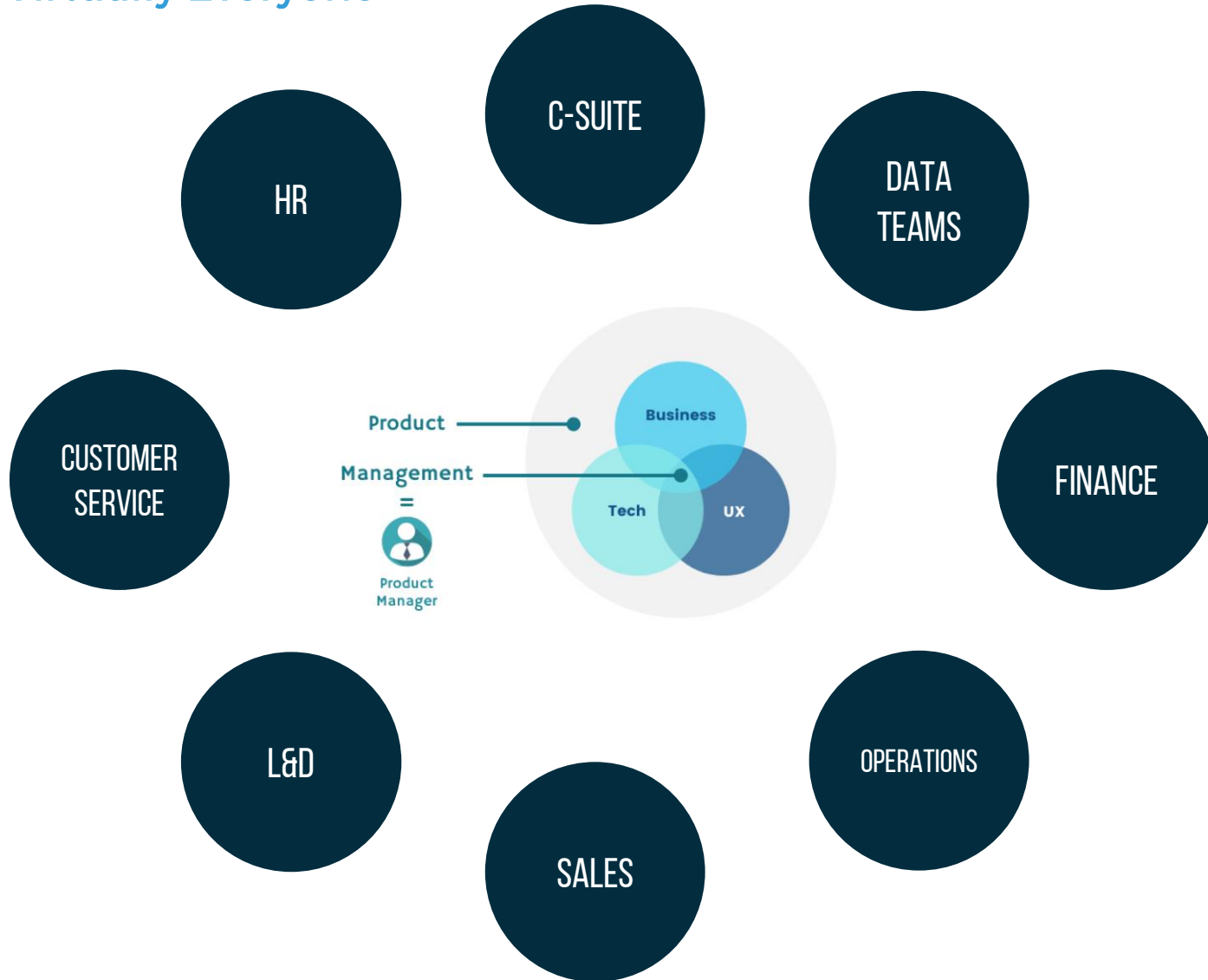
NEW WAYS OF THINKING = NEW WAYS OF LEADING

The need to lead with a Product Mindset is not limited to the Product Management job family.

In fact, in order for newly established Product Leaders to succeed, they need support from leaders across the company. This stuff impacts everyone.

Exclude any of these other groups from the organizational evolution and you'll unintentionally create obstacles for your effort.
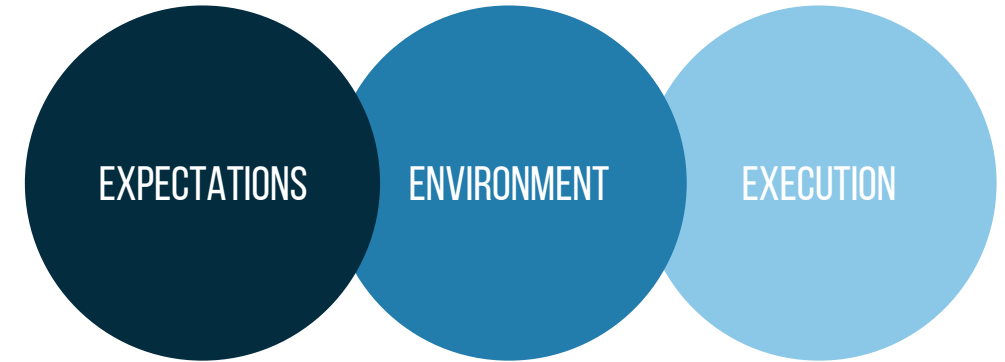
WHAT IT FEELS LIKE TO THOSE STAKEHOLDERS

Not Brought Along, but Sent to Agile Training as part of "Transformation"

ALTERNATIVE: HELP THEM SOLVE THEIR PROBLEMS (NOT YOURS)

Doesn't Matter What Group You're In, Something Has You Stressed

EXPECTATIONS   **ENVIRONMENT**   **EXECUTION**

3 E'S OF PERSONAL / TEAM DEVELOPMENT

- Concepts & Tactics Apply to Everyone
- Fills Holes in Current Leadership Training
- Ancillary Benefits for Cross-Functional Collab
- Adds Real Value for Learners
- Everything Founded in Product Principles

RECENT EXPERIMENT

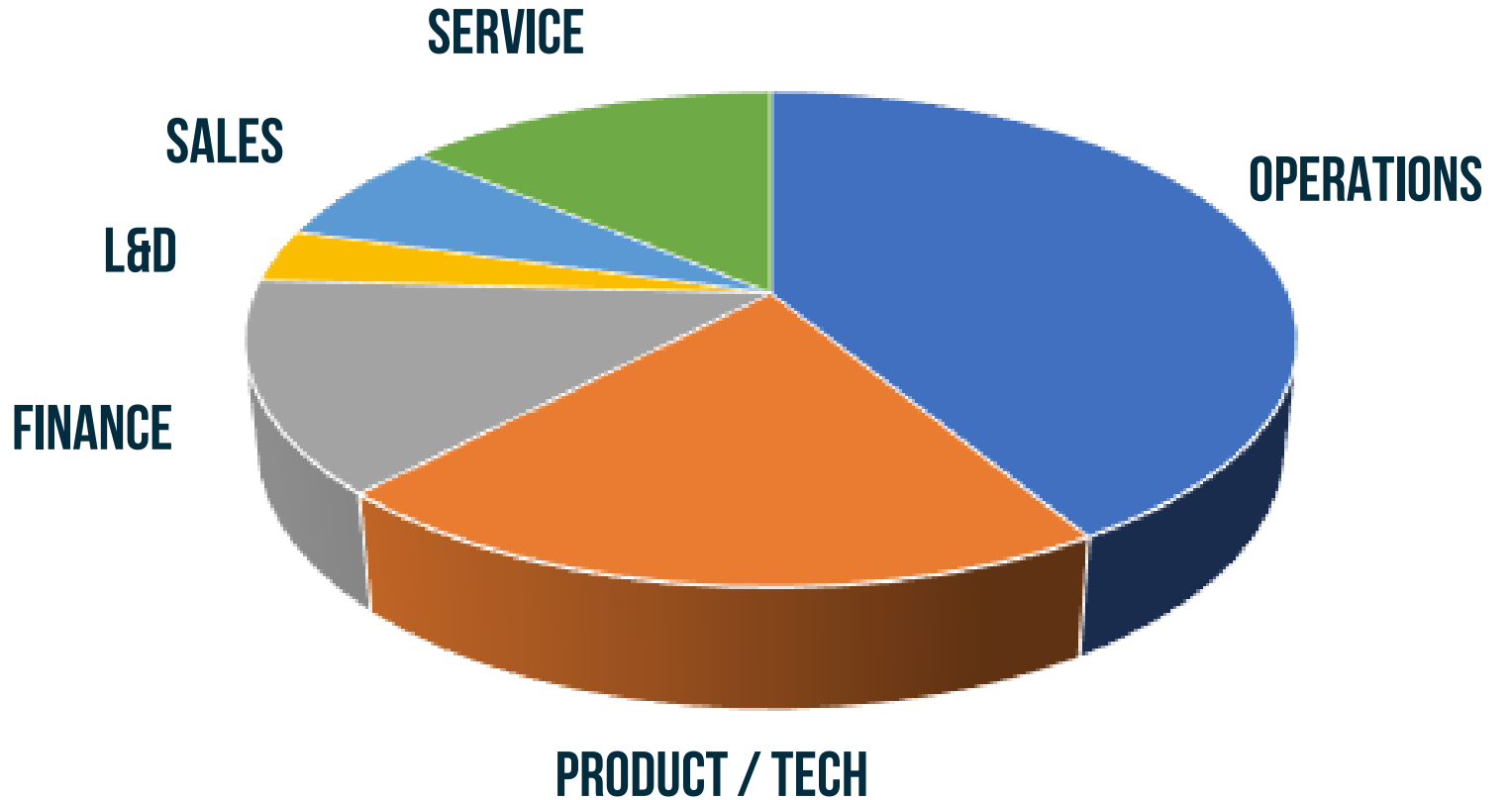## The Problems They Were Facing – The Why Behind it All

- **Lack of alignment across functional areas**
- **Low flow & blame games**
- **Perceived lack of empowerment in most areas of the org**
- **Recognition that they had made silo'd investments**
- **Low people leader engagement scores on internal surveys**

Training Sponsored by Company President(s) and Positioned as Enterprise-Level Leadership Training
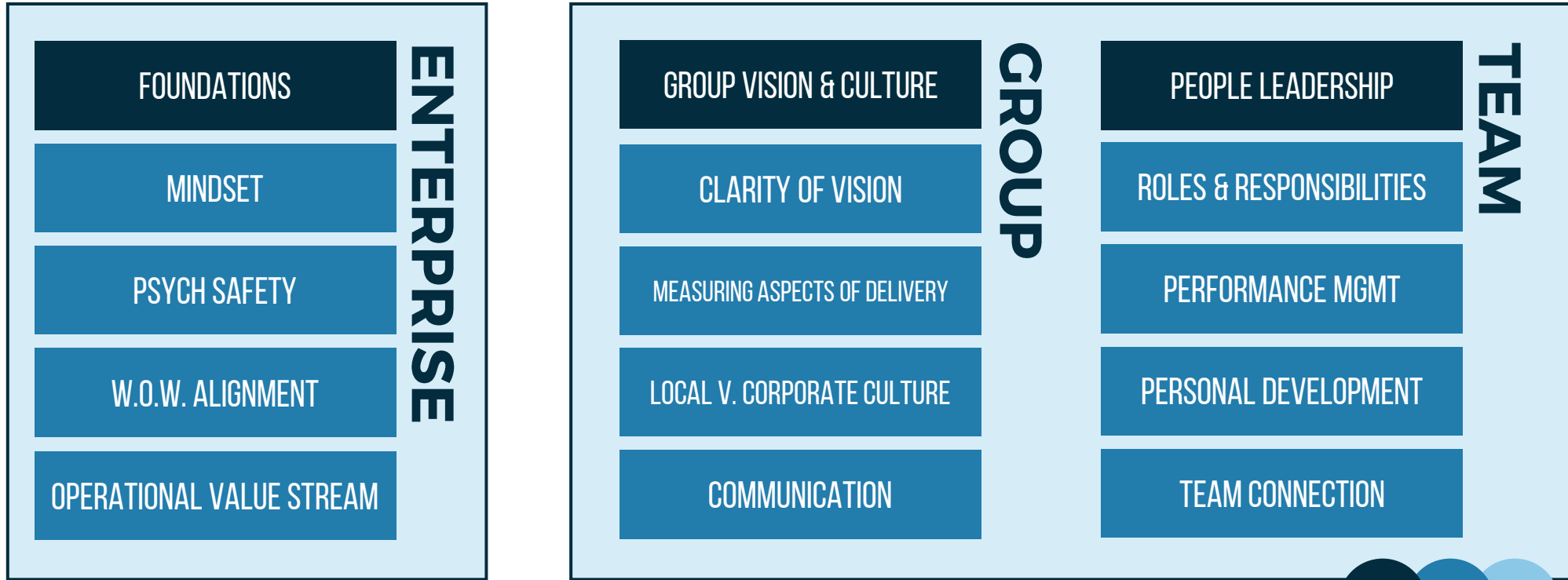
RECENT EXPERIMENT (CONT)

Mortgage Client – 30 Leaders – "Leading with a Product Mindset"

LEADERS OF LEADERS

LEADERS OF INDIVIDUAL CONTRIBUTORS

SERVICE

SALES

L&D

FINANCE

OPERATIONS

PRODUCT / TECH

RECENT EXPERIMENT (CONT)

Remove the Jargon (Mostly), Focus on Shared Values & Practical Tools – **Inspire Ownership**

ENTERPRISE
- FOUNDATIONS
- MINDSET
- PSYCH SAFETY
- W.O.W. ALIGNMENT
- OPERATIONAL VALUE STREAM

GROUP
- GROUP VISION & CULTURE
- CLARITY OF VISION
- MEASURING ASPECTS OF DELIVERY
- LOCAL V. CORPORATE CULTURE
- COMMUNICATION

TEAM
- PEOPLE LEADERSHIP
- ROLES & RESPONSIBILITIES
- PERFORMANCE MGMT
- PERSONAL DEVELOPMENT
- TEAM CONNECTION

2 Days in person
6 additional weeks of follow-on group sessions & coaching (~3 hours per week)

THE HOW: MINDSET FIRST, TACTICS SECOND.

Leaders drive toward shared values. Shared values drive new behaviors. New behaviors (and tools) drive change.

HEAD & HEART

DELIVERY-CENTRIC

TRUST

EMPATHY

PASSION

CURIOSITY

HUMILITY

BIAS TOWARD ACTION

KINSHIP

RUTHLESS FOCUS

For our:
- Customers
- Teammates
- Stakeholders
- Shareholders
- Partners

For:
- Our product
- Our role
- Our domain
- Learning
- Innovation

About:
- Product ideas
- What's next
- Finding problems worth solving
- Our competition

We assume we are wrong until proven right

We give each other grace as we learn

We:
- Empower teams
- Operate w/ urgency
- Action over talk
- Experiment quickly
- Value outcomes over output
- Deliver small pieces of work often

We:
- Have shared:
  - Purpose
  - Vision
  - Identity
  - Values
- Have audacious goals
- Make personal connections
- Pursue excellence

We:
- Have the courage to make decisions (aka saying no)
- Know we can't serve everyone and we're unapologetic about that fact

We define *culture* as a shared set of values (what we care about), beliefs (what we believe to be true), and norms of behavior (how we do things). Cultures exist to align effort, engender shared understanding, increase predictability, and help each of us show up as our authentic selves in a safe environment.

PRACTICAL USES FOR THE VALUES

Three Levels – Enterprise, Group, Personal/Team

| REFLECT: WHICH OF THESE GRABS YOUR ATTENTION? WHY?

Discuss at Your Table (or Work Independently Online)

HEAD & HEART

DELIVERY-CENTRIC

TRUST

EMPATHY — PASSION — CURIOSITY — HUMILITY — BIAS TOWARD ACTION — KINSHIP — RUTHLESS FOCUS

For our:
- Customers
- Teammates
- Stakeholders
- Shareholders
- Partners

For:
- Our product
- Our role
- Our domain
- Learning
- Innovation

About:
- Product
- What's
- Finding
  worth s
- Our com

Let's go for ~20 minutes
- 5 minutes to pick two
- 15 minutes to talk abo

| FROM VALUES TO ACTION

Shifting Away from the Abstract to Tackling Areas of Dissonance

HEAD & HEART

TRUST

EMPATHY — PASSION — CURIOSITY — HUMILITY — BIAS TOWARD ACTION
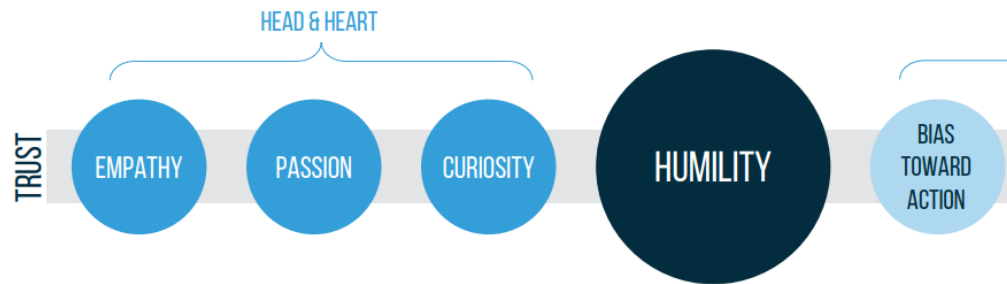
AS LEADERS,
WHAT SPECIFIC BEHAVIORS AND ACTIONS MUST **YOU** COLLECTIVELY TAKE TO ENSURE YOU, YOUR TEAMS, & YOUR PROCESSES REFLECT SIMILAR VALUES?

WHAT POTENTIAL BLOCKERS ARE IN YOUR WAY?
ARE THEY REAL OR PERCEIVED?

PRODUCT VALUES – PERSONAL REFLECTION

Statement	Strongly Disagree → Strongly Agree				
	1	2	3	4	5
I assume I am wrong until proven right					
I encourage, plan for, and require my teams to experiment					
I reward team members that question my ideas					
I advocate for co-creation tactics with our enterprise partners					
It is safe to challenge my leader's ideas					
I am willing to be vulnerable with my peer group					
I am willing to be vulnerable with my leader					
My unique perspective is heard and respected					
I can flex my approach to a problem, even while under pressure					
I require that my team work directly with those they serve					
I work on my team's behalf to create cross-functional partnerships					
I proactively work to remove systemic obstacles for my teams					
I understand the needs of the customers my team serves					
I understand the processes my team members have to follow					
My team understands why they are doing what they do					
My team is working at a sustainable pace					
My team feels reactive most of the time					
My team breaks work down into small pieces					
I provide the destination, my teams figure out how to get there					
I measure the impact of our work					
I prefer quality over quantity					
I model a curious spirit for my team					
I always have a clearly articulated personal learning objective					

Consider Validating Your Answers with Your Team

3 E'S OF PERSONAL / TEAM DEVELOPMENT

Proactive Steps Will Help Minimize the Need for Reactive Steps

EXPECTATIONS
Make sure folks understand the group's Why and how they are expected to show up.

ENVIRONMENT
Lead by example and create a safe learning environment within your team

EXECUTION
Accountability as a carrot, not a stick. How well have we moved ourselves toward our vision?

HYPOTHESIS
THE MAJORITY OF YOUR REACTIVE ISSUES WILL TIE BACK TO SHORT-COMINGS IN YOUR 3E PROACTIVE WORK

TOOLS

- CHARTER (TEAM)
- SKILLS MATRIX, R&R
- INDIVIDUAL LEARNING PLANS

- PSYCH SAFETY & EQ
- OPERATIONAL VALUE STREAM
- IMPROVEMENT BACKLOG
- CONNECTION ROUTINES

- PERSONAL & TEAM REFLECTION
- MEASURE OUTCOMES & IMPACT
- ITERATE

Shared language
When the entire org begins to focus on outcomes, it will help your product teams operate in new ways.

PRODUCTIVE EMPOWERMENT REQUIRES CLARITY

Charter = Team-Level Clarity, Aligning Around Why We're Here

EXPECTATIONS

Make sure folks understand the group's Why and how they are expected to show up.

TOOLS

- CHARTER (TEAM)
- SKILLS MATRIX, R&R
- INDIVIDUAL LEARNING PLANS

A collaboration tool like Mural

A simple deck can be a great way to summarize the key points of the discussion and serve as both an ongoing reference for the team, and a marketing tool for their work.

INDIVIDUAL EXPECTATIONS ARE EQUALLY IMPORTANT

Cultures that are Marked by a Growth Mindset Don't Happen Accidentally

EXPECTATIONS

Make sure folks understand the group's Why and how they are expected to show up.

TOOLS

- CHARTER (TEAM)
- SKILLS MATRIX, R&R
- INDIVIDUAL LEARNING PLANS

Coaching Skills Inventory

Please provide us with a quick summary of your direct experience with coaching teams on the following concepts and activities. Use the notes column to provide brief context that could be beneficial.

Activity	1	2	3	4	5	Notes
						1= no experience, 5 = three+ years of direct coaching experience/examples
Product Chartering					X	Love this stuff – want to get more direct experience with generating product roadmaps with teams.
OKR Development				X		
Problem Space Definition				X		
Roadmap Development				X		
Customer Interviewing					X	Have made modifications to Persona templates that have driven valuable mindset shifts.
Persona Creation					X	
Value Stream Mapping			X			I've done a ton of mapping, but I always feel like I'm free-wheelin' a bit. Would like to further develop my prototyping skills
User Story Mapping				X		
Prototyping			X			
User Story Creation			X			During my 20 or so years of being a direct part of software teams, I leveraged traditional methods. I work on these activities with many of my teams, but I focus primarily on Definition and Discovery. I may be under-selling the knowledge in the space. Looking forward to learning the different ways folks on our team approach/tackle these activities
Idea Backlog / Vetting				X		
Backlog Prioritization				X		
Opportunity Canvas					X	
Scrum Roles & Responsibilities					X	
Agile Values & Principles					X	
Scrum Framework					X	
Backlog Grooming			X			
Sprint Planning			X			
Sprint Demo			X			
Sprint Retro				X		
Daily Standup				X		
Kanban				X		Would like to deepen my usage of Kanban to touch on more complicated flows
Traditional SDLC				X		
LEAN				X		Studied DMAIC Principles at Target as a BA and applied them to projects
Design Thinking				X		Have participated in, and facilitated, Google Design Sprints and Product Discovery Immersion Workshops that leverage these principles. Not sure if a UX/CX person would say I'm doing them "right", but I believe I fully embrace the concepts and apply them
SAFe		X				Am certified in SAFe, but am not a practitioner
Nexus	X					
Scrum @ Scale	X					Have not explored the other scaling frameworks and am not super excited about them
LESS	X					
Google Design Sprints				X		
People Mgmt Experience					X	~5 years in Tech, 5 years in Ops
Mentoring					X	

	1	2	3	4	5	Notes
Experience as Software Developer	X					Have done some brochureware Web Development and a very little bit of SQL work when I was a wee lad
Executive Coaching				X		Direct exposure to the C-Suite at Target, VP & SVP Level coaching on Values and Principles
Formal Change Mgmt Models					X	Certified OCM dude (Target's Procci Model)
Product Org Structure Definition					X	Have coached Sr Tech leaders on Org Design. Not as comfortable with it as I thought I'd be.
Conflict Management				X		
Large Group Facilitation				X		
Quarterly Cross-Team Planning		X				I've done it at smaller scale, but would like to get more direct exposure to larger scale planning events via both SAFe and QPP

Would love to get more formal training on Psychological Safety

	1	2	3	4	5	Notes
Automated Testing	X					I have always partnered with tech coaches to touch on these topics, but I'd love to learn the DevOps tool chain in a way that sticks with me. I've learned the basics more than once and it never seems to really stick. Partially due to interest, partially due to lack of direct application.
CI/CD	X					
Object-oriented languages	X					
Source/Version Control	X					
Cloud	X					
Pairing/Mobbing	X					
Microservices	X					
Infrastructure		X				
VersionOne		X				Have used VersionOne, Jira, and Teams as a team member, no administrative experience with any of them. Not horribly passionate about tools in general except for the idea of Product Management tools that are often passed over (Aha!, ProdPad, etc) – would love to help move toward those types of tools for the Bank.
Jira		X				
TFS	X					
Confluence		X				
MS Teams		X				
Slack			X			
Other Tools						Mural Trello
Certifications (List)						CSM – Certified Scrum Master SA - SAFe Agilist ICP-ACC – Certified Agile Coach Member: Collaborative Gain – Product Council
Other Coaching Related Skills						Public Speaking Communication Planning Influencing Without Authority Risk Management Principles Project & Program Management Experience ~10 Years of Business Analyst Experience Studio Art (supports creative problem solving)

SAFETY

As a Leader, You Drive Your Local Culture – Make it a Safe One

ENVIRONMENT

Lead by example and create a learning environment within your team

TOOLS

- PSYCH SAFE EVAL & EQ
- OPERATIONAL VALUE STREAM
- IMPROVEMENT BACKLOG
- CONNECTION ROUTINES

1. PEOPLE AT THIS ORGANIZATION ARE ABLE TO BRING UP PROBLEMS AND TOUGH ISSUES
2. I FEEL SAFE TO TAKE A RISK IN THIS ORGANIZATION
3. IT IS DIFFICULT TO ASK OTHER MEMBERS OF THIS ORGANIZATION FOR HELP
4. NO ONE AT THIS ORGANIZATION WOULD DELIBERATELY ACT IN A WAY THAT UNDERMINES MY EFFORTS
5. WORKING WITH MEMBERS OF THIS ORGANIZATION, MY UNIQUE SKILLS AND TALENTS ARE VALUED AND UTILIZED
6. IF I MAKE A MISTAKE AT THIS ORGANIZATION, IT IS OFTEN HELD AGAINST ME
7. PEOPLE AT THIS ORGANIZATION SOMETIMES REJECT OTHERS FOR BEING DIFFERENT

WE DELIVERED OUR EVALUATION ELECTRONICALLY AND CAPTURED BOTH A NUMERICAL RATING AND A NARRATIVE
WE MANUALLY TABULATED THE SCORING VIA SPREADSHEET

1 – Strongly Disagree
2 – Disagree
3 – Neutral
4 – Agree
5 – Strongly Agree

Note: scoring needs to take into consideration that you are looking for positive responses for some and negative for others. (see color coding)

Credit: Amy Edmondson, The Fearless Organization

the fearless organization

Creating **Psychological Safety** in the Workplace for Learning, Innovation, and Growth

Amy C. Edmondson
HARVARD BUSINESS SCHOOL
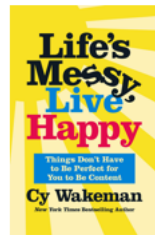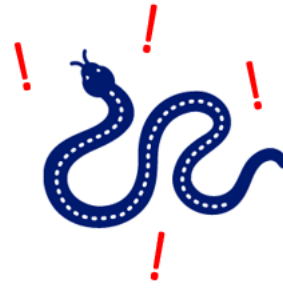
EMOTIONAL INTELLIGENCE

Don't Get Hijacked by the Stress of the Day-to-Day

ENVIRONMENT

Lead by example and create a learning environment within your team

TOOLS

- PSYCH SAFE EVAL & EQ
- OPERATIONAL VALUE STREAM
- IMPROVEMENT BACKLOG
- CONNECTION ROUTINES

EQ

IQ

STIMULUS

RESPONSE

REACT
<AMYGDALA>

FEEL
<LIMBIC SYSTEM>
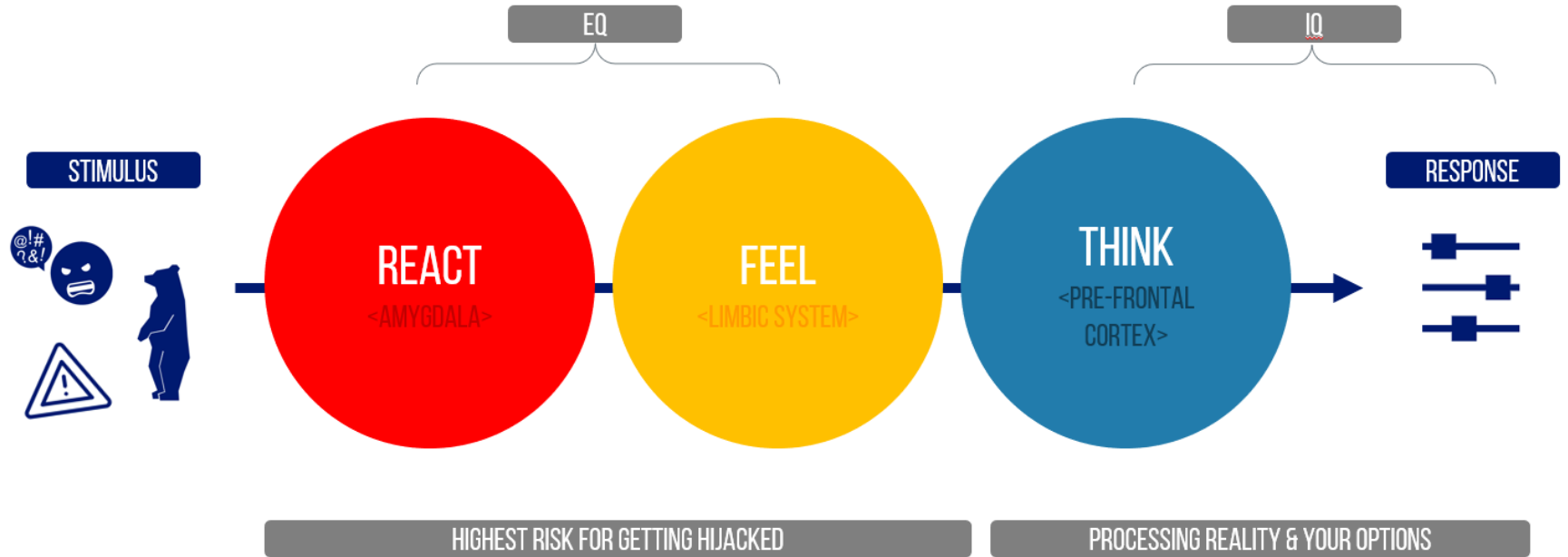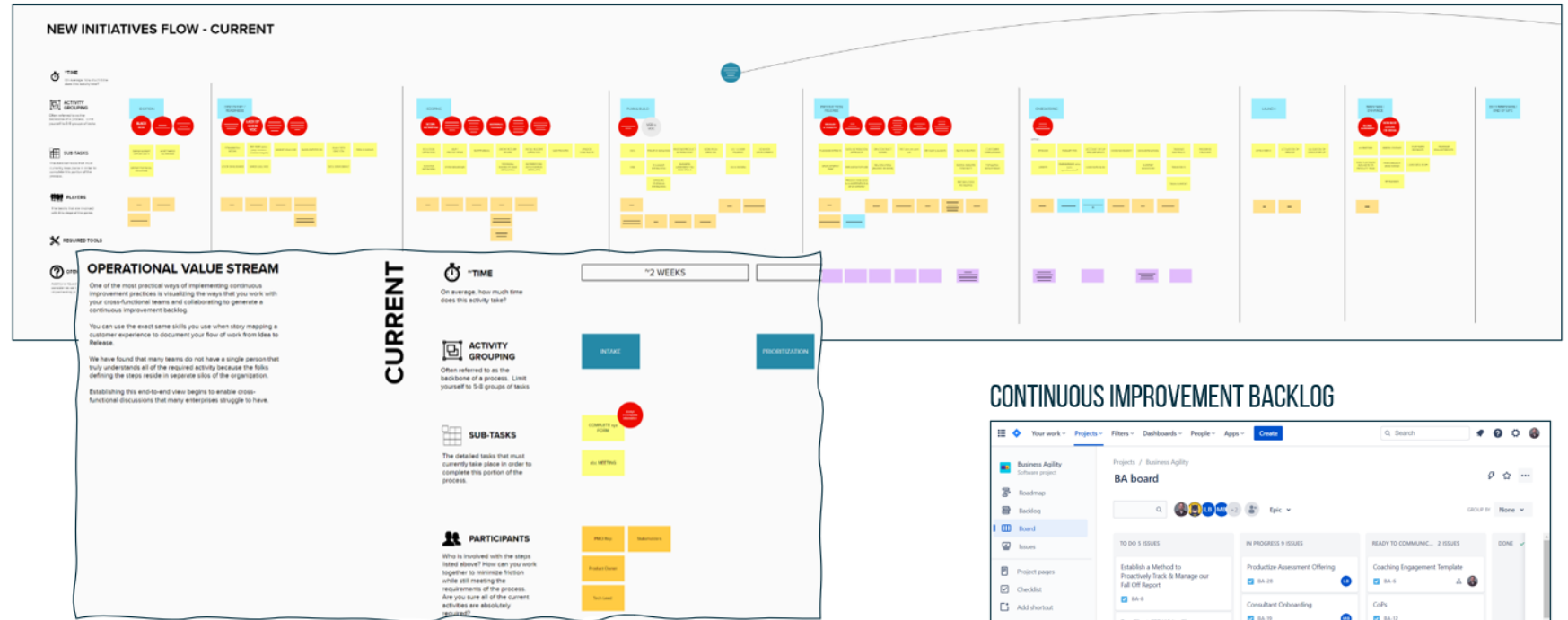
THINK
<PRE-FRONTAL CORTEX>

HIGHEST RISK FOR GETTING HIJACKED

PROCESSING REALITY & YOUR OPTIONS

EMOTIONAL INTELLIGENCE

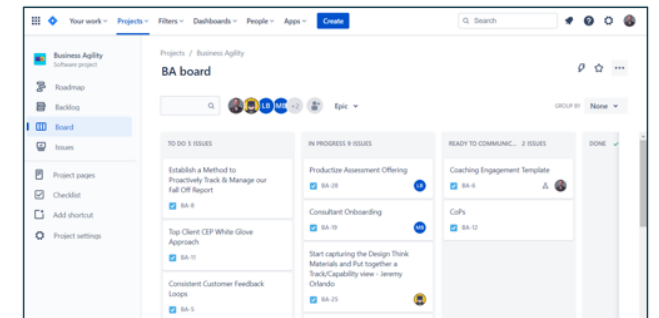Don't Get Hijacked by the Stress of the Day-to-Day

ENVIRONMENT

Lead by example and create a learning environment within your team

TOOLS

- PSYCH SAFE EVAL & EQ
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- IMPROVEMENT BACKLOG
- CONNECTION ROUTINES

Life's Messy. Live Happy
Things Don't Have to Be Perfect for You to Be Content
Cy Wakeman
New York Times Bestselling Author

"OH SH*T!" FREEZE!

HEAVY BREATHING MUSCLES TIGHTEN

OH. THAT'S A ROPE.

"HOW CAN I SURVIVE A SNAKE BITE ON A MOUNTAIN?!?"
"WHAT CAN I FIND TO KILL IT WITH?"
"HOW CAN I PROTECT THOSE AROUND ME?"
"HOW ARE THE KIDS GOING TO SURVIVE WITHOUT ME?"
"WHO IS GOING TO SUCK THE VENOM OUT OF MY ANKLE?"

THE ROPE DIDN'T CAUSE HER STRESS.

THE STORY SHE TOLD HERSELF ABOUT THE ROPE DID.

WHERE ELSE DO WE DO THIS?

CONTINUOUS IMPROVEMENT

Leadership = Understanding the System & Constantly Optimizing it for the Team You Serve

ENVIRONMENT

Lead by example and create a learning environment within your team

TOOLS

- PSYCH SAFE EVAL & EQ
- OPERATIONAL VALUE STREAM
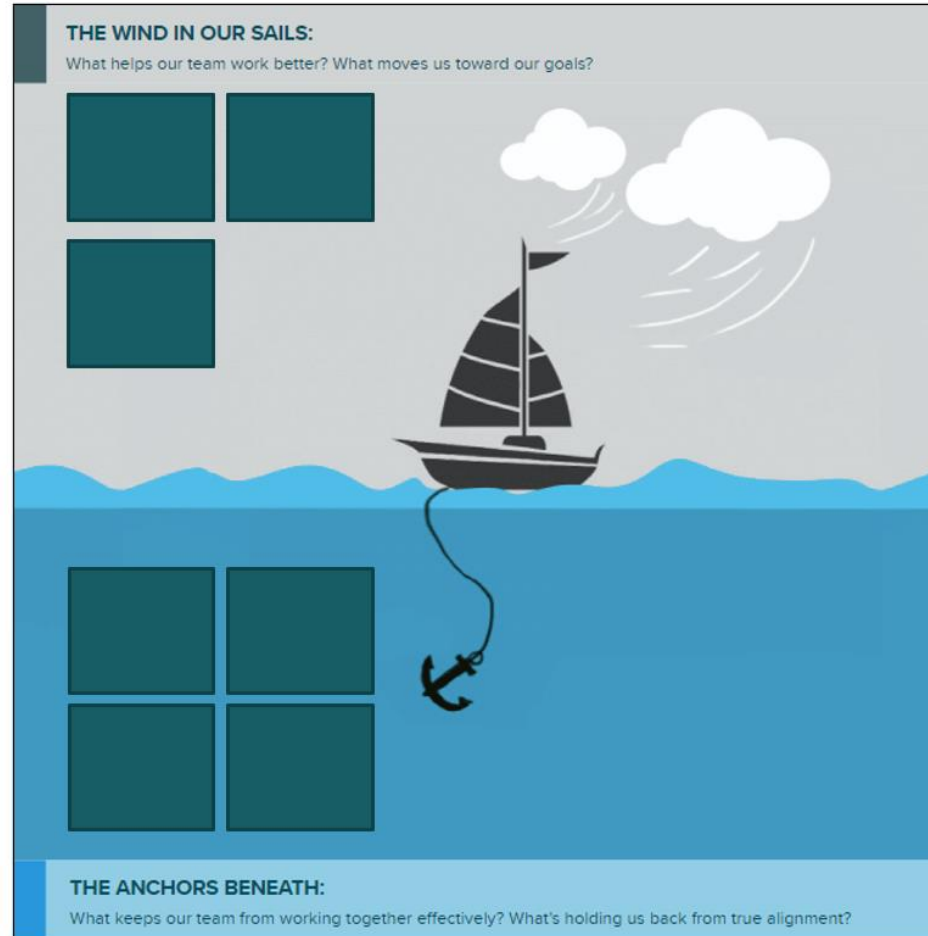- IMPROVEMENT BACKLOG
- CONNECTION ROUTINES

RETROSPECTIVES

Consistent Reflection in the Spirit of Continuous Improvement
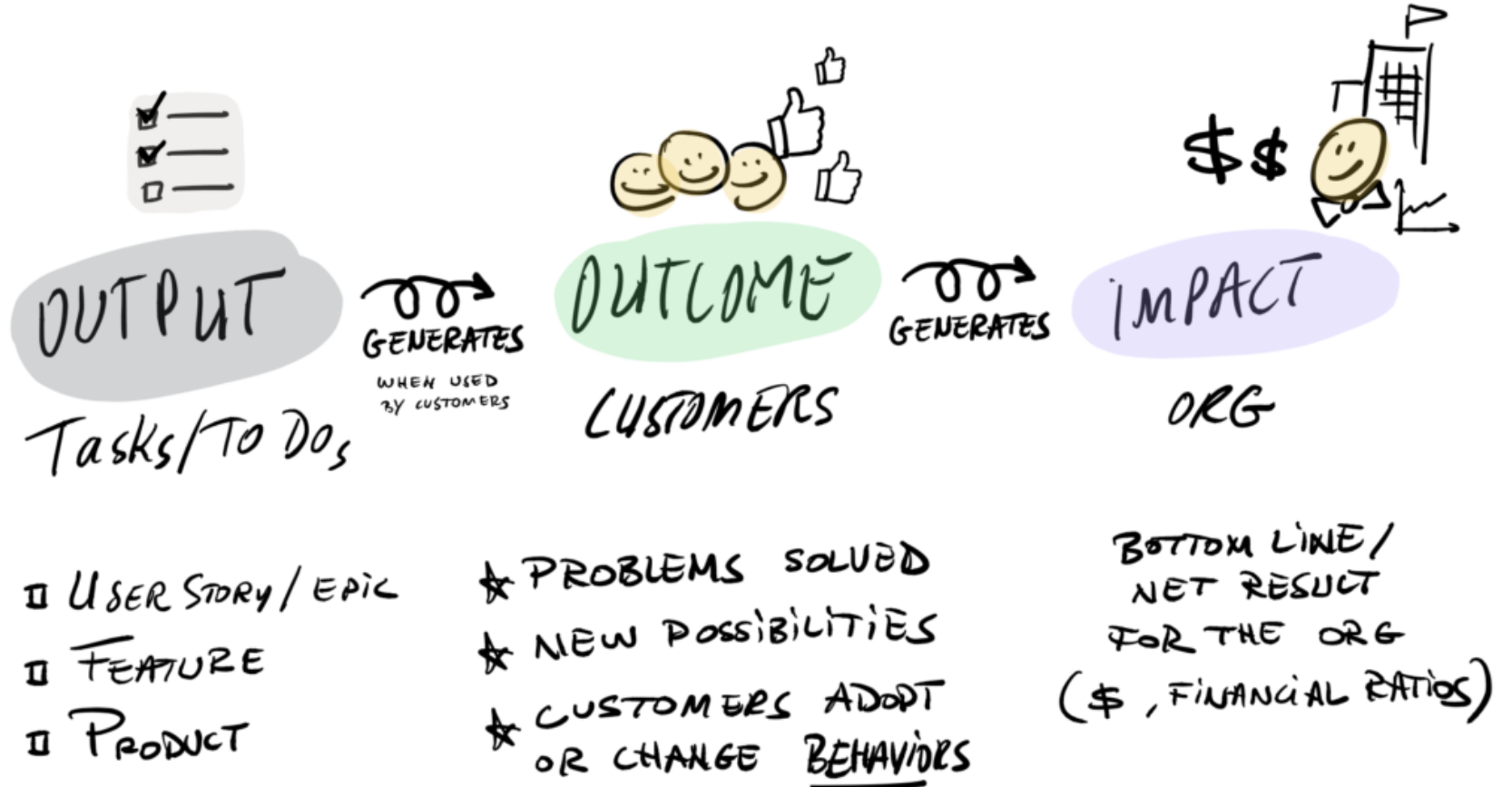
EXECUTION

Accountability as a carrot, not a stick. How well have we moved ourselves toward our vision?

TOOLS

- PERSONAL & TEAM REFLECTION
- MEASURE OUTCOMES & IMPACT
- ITERATE

THE WIND IN OUR SAILS:
What helps our team work better? What moves us toward our goals?

THE ANCHORS BENEATH:
What keeps our team from working together effectively? What's holding us back from true alignment?

A simplified example of the Sailboat Retro

CONTINUOUS REFLECTION

- PEOPLE
- PROCESS
- DATA
- TECHNOLOGY

HOW WE OPERATE IS AS IMPORTANT AS THE PROJECTS WE DELIVER

DEFINING VALUE WITH NEW LENSES

Output, Outcome, and Impact*

EXECUTION

Accountability as a carrot, not a stick. How well have we moved ourselves toward our vision?

TOOLS

- PERSONAL & TEAM REFLECTION
- MEASURE OUTCOMES & IMPACT
- ITERATE

OUTPUT

GENERATES
WHEN USED BY CUSTOMERS

Tasks/To Dos

☐ USER STORY / EPIC
☐ FEATURE
☐ PRODUCT

OUTCOME

GENERATES

CUSTOMERS

★ PROBLEMS SOLVED
★ NEW POSSIBILITIES
★ CUSTOMERS ADOPT OR CHANGE BEHAVIORS

IMPACT

ORG

BOTTOM LINE / NET RESULT FOR THE ORG ($, FINANCIAL RATIOS)

| RESULTS / FEEDBACK
A Third, A Third, A Third - Loosely

"I can say beyond a shadow of a doubt that your sessions and materials provided a plethora of incredible guideposts and made me rethink my approach to leadership...

It helped my co-leader and I take a new look at the dynamics of our CX team and reconsider how best to build on the strengths of every individual in order to drive engagement and meaningful contribution..."

- CX Leader

"You helped to give me permission to stop waiting around. I know all too well that we can't control anyone else's actions – only our responses.

Somehow that hadn't connected to work, but with your help, I can see more than ever that I've been waiting for someone to give me permission and assume that I have to copy the "culture" here. Not anymore.

I think I've got more productive work done in the last two months than I have in the past year."

- L&D Leader

NPS of ~45 (on a scale of -100 to 100)

WHAT I'D DO DIFFERENTLY

"Mmmm, Perfect, It Was Not"

- **Shorten it up and do it all in-person if possible**
  - IF NOT IN PERSON, CONDENSE TO A FEW HALF-DAYS

- **Ensure that the Sponsors go thru the class with their leaders**

- **Continue a cadence of follow-up with all participants**
  - I HATE NOT KNOWING HOW THEY ARE DOING

QUESTIONS I'M EXPLORING / PONDERING

"Things that make me go Hmmm…"

- **Who Should Be Delivering this Content?**
  - C.O.O. <?>
  - ENTERPRISE STRATEGY <?>
  - TRADITIONAL L&D <?>
  - PRODUCT/TECH <?>
  - AGILE/PRODUCT COACHES <?>

- **What Would Provide Add'l Value? Where Are the Gaps?**
  - TACTICS FOR BREAKING DOWN WORK ARE LACKING
  - COACHING UPWARD <?>
  - <INSERT YOUR IDEAS HERE>

IMMEDIATE ACCESS TO ALL THE THINGS
Handy Dandy Mural Board with Embedded Tools & Learning Resources

LET'S YAP (& CONNECT)