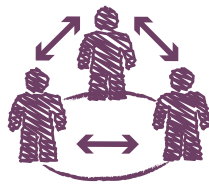


# REIMAGINE TRANSFORMATION

## THE



## APPROACH



EXCERPT: INTRO TO THE INTEGRAL AGILE APPROACH

If you are a leader tasked with choosing how to improve business and/or technological practices in order to stay competitive with an ever moving market, the amount of options truly boggle the mind. Most companies are in some kind of transition from Waterfall to Agile, but once a person opens the “Agile/Lean box,” they are encountered with:

Scrum, Kanban, Lean, Nexus, DA, Scaled Scrum, LeSS, SAFe, XP, Crystal, DSDM (Dynamic Systems Development Method), FDD (Feature Driven Development), ASD (Adaptive Software Development), RAD (Rapid Application Development), Enterprise Business Agility, Design Thinking, Systems Thinking, and many more.

To further complicate the decision, there’s a question of who you choose to implement the transformation. Should one go the expensive route with the likes of McKinsey, BCG, Bain, Deloitte, or PWC? Would it be better to start with a company more focused offshore like Infosys or Cognizant, or split the difference and use one of the many vendors that occupy the middle ground?

How does one navigate this informational minefield, with each company claiming to provide the best services, and practitioners of each framework claiming its superiority with something bordering on religious fervor?

It’s an impossible decision to make that carries a consequence of 10s-100s of millions of dollars depending on the size of your organization. Most leaders, overwhelmed with these options, choose the safest route and try to figure out what everyone else is doing, which is the exact opposite of their goal: to be innovative and stay ahead of their competitors.

Companies are incented to keep these options complicated, the longer and more complicated this journey is, the longer they can continue to charge their clients, and once the transformation fails to have its intended effect, they can pounce on the disillusioned client claiming the last vendor had done it all wrong, with promises of their ability set them on the right path.

Most companies have been down this road several times, and like a person taking too many medications, their people, systems, and culture are becoming more and more resistant to receiving the potential beneficial effects of any attempted change.

Our intention in creating the Integral Agile Approach is to collapse this complexity into a few simple ideas that are ALWAYS TRUE. Another way to think about it is “what practices, systems, and models will human beings need when they try to organize large groups of people to collaboratively solve complex problems using technology in an ever shifting economic environment?”

To answer this question, we examined all current frameworks and practices and shared our own hacks we came up with individually to address the gaps in modern Agile. Thinking holincally, we then went through each idea and asked the question “what would happen if we didn’t do this one, or can we combine these into one session?” Our intent was to finish with as few ceremonies as possible while addressing the needs of each holon, and maintaining connection and/or alignment with all other holons.

We also wanted to address the misconception that things dramatically increase in complexity as companies scale Agile. Yes, there are more moving parts, and the impact of something going wrong can be more damaging, but in essence, no matter the level of scale, all teams need to perform these 5 activities:



IDEATE



PLAN



COORDINATE



RETROSPECT



REVIEW

This is as true of a Scrum or Kanban team, as it is for the C-Suite team, the only questions are: How large are the pieces on the board? And, How close

am I to the work being done, or put another way, Is the information I'm basing my decisions on true?

For Scrum teams the answer to the latter question is almost always yes, for senior leadership teams, that is unfortunately rarely the case as the truth is often obfuscated to provide a more palatable status report.

At its core, the Integral Agile Approach is built upon these fundamentals:

***Relentlessly establish what's empirically true and ensure the transparency and communication of that truth is used in all decision making.***

In order to make the above possible, we use the tools in Integral Theory in the following way.

1. Holons: No system or construct can be healthy if the parts that make up that system are unhealthy (a team cannot be healthy if the individuals who make up that team are in distress).
2. Quadrants: No opportunity or challenge can be effectively addressed if we cannot see the WHOLE picture. Use all 4 perspectives to ensure you are addressing the root cause and not just chasing symptoms.
3. Levels: People's unconscious value systems will prevent effective communication and collaboration unless those systems are understood and integrated in the service of a common objective.
4. Lines: Those value systems present in both individuals and the organizational culture will vary depending on the subject or situation. These too must be revealed and integrated in order to ensure alignment with stated objectives.
5. Types: Help people better understand their own and their colleagues preferences, strengths, and weaknesses in order to put them in the best possible position to succeed.

*As long as people feel like they must hide or alter the truth in order to be safe or get ahead, agility at scale will be impossible.*

Before we break down the Integral Agile Approach in a step by step fashion, let's break down how those 5 models work and build upon each other.

## **HOLONS**

**No holon (person, team, etc.) can be healthy if the holons below it are not healthy.**

How do we know if a holon is healthy? Examine it from a 4 quadrant perspective!

## **QUADRANTS**

**Upper Left, Interior Individual:** What is their internal experience? How are they feeling? This can refer to a person who feels anxious at the individual level or a team with collectively low morale at the team level and so on.

**Lower Left, Interior Group:** How does the group feel about each other? Are the relationships healthy & collaborative? This can refer to a person's relationships with their teammates, multiple teams who have to collaborate together, or how different organizations in an enterprise associate with each other.

**Lower Right, Exterior Group:** This is the environment in which everything takes place. Schedules, rules, workspaces, choice of technology environments, the extent to which these support or hinder success have a huge effect on efficiency and how people choose to work.

**Upper Right, Exterior Individual:** A simple way to refer to this quadrant is the "printout." The Upper Right is what we can visibly see and measure. In the context of a team, Agile or otherwise, this represents the product they're working on, it's quality, how fast it's being developed, etc. *The*

*results seen from this quadrant are a direct result of the other three as demonstrated below.*

- **Upper Left:** If people are upset or otherwise disengaged the quality and quantity of their work will suffer.
- **Lower Left:** If people are not collaborating well or don't trust each other their work will be out of sync causing defects or functionality that has to be re-worked.
- **Lower Right:** If the process, rules, or roles don't support the team's success it will slow their ability to deliver value.

These and other potential issues are not difficult to address if the effort is put in to understand which quadrant contains the root cause.

## **LEVELS**

People's unconscious value systems can make it difficult for them to communicate or agree on a course of action. The three dominant value systems in a working environment are as follows:

### **AMBER: RULE/ROLE FOCUS**

**What Amber Values:** Conformity, security, and minimizing risk. Stable roles and well-defined organizational structure.

**What Amber Needs:** Security & support including stability, privacy, status, identity, and future prospects.

**Example:** A leader who enforces compliance with the status quo because "that's how things have always been done"

### **ORANGE: ACHIEVEMENT FOCUS**

**What Orange Values:** Boldness, competition, and success, verified through result oriented, data driven feedback loops.

**What Orange Needs:** Personal growth and achievement.

**Example:** A leader who is willing to break the rules to drive KPIs, innovation, and technological solutions.

## **GREEN: RELATIONAL FOCUS**

**What Green Values:** Connectedness, equality, health, cooperation, diversity, sustainability and self awareness.

**What Green Needs:** To heal the ills of those who came before. Environmental and social health, justice, and equality.

**Example:** A leader who fosters inclusion and collaboration to improve morale and quality of life.

Those three value systems are necessarily at odds with each other because they have a “zero sum game” mentality.

A highly amber person wants all processes and rules to be followed to the letter as they believe that will give the team the best chance to succeed.

A highly orange person believes that spending time having a retrospective is a waste of time that could be better spent developing value that can earn the company more money.

A highly green person will focus on the morale and happiness of the team to the exclusion of other things including whether they are producing valuable work.

Take a moment to consider which of those 3 best apply to what you value, and consider times when you might have been in an argument with someone where no matter how hard you tried, you just couldn't see eye to eye. You were probably both pushing for what you each thought was best for everyone, and you were both probably right in many respects.

There is a 4th, emergent value system that integrates all three of these value systems:

## **TEAL: INTEGRATE AND INCLUDE**

**What Teal Values:** Wholeness & integrity. Experiences the “*fundamental interconnectedness between all things.*”

**What Teal Needs:** Authenticity, synergy, the realization of their life's deepest purpose.

**Example:** A leader who optimizes flow of value through the system by integrating order, achievement, and harmony.

In order to succeed, it's necessary to incorporate all three of those value systems. We need balance as well as controls, we need achievement as well as innovation, and we need the health and happiness of our workers.

## **LINES OF INTELLIGENCE**

If you were to hear that someone was intelligent, what's the first thing you think of? Is it doing well in school? Rocket science or brain surgery perhaps? Lines of Intelligence adds needed depth to our typically reductive ideas of what it means to be intelligent by answering questions such as "why is it that a person with an IQ of 160 can find themselves unable to apply that cognitive ability in many situations?"

Lines additionally expand on the Levels of Development, if a person's value system is predominantly Green, for example, they are likely not Green across the board. They could be cognitively and morally green, but emotionally impulsive. This person would not be able to apply the green values of generosity and abundance to their own needs and impulses. The result would be a person who is always trying to do what's best for others as long as their needs aren't in conflict. When their needs ARE in conflict they would act in their own best interest regardless of how incongruent that might appear to their stated values.

This is also true of organizational culture. Most organizations are a mix of Amber, Orange, and Green cultures, with the genesis of that culture coming from a mix of the overall corporate culture, and the values of the leader of that area. Revealing an organization's cultural map is critical to understanding whether the culture of a given area of the organization is at odds with the objectives they're responsible for. If, for example, there is an objective to improve profit and efficiency in an area that has an Amber



culture, the emphasis on following the rules to the letter and ensuring no mistakes are made will slow the innovation necessary to achieve that objective.

*This is happening in some form in every company across the world, and people are completely unaware of it!*

## **TYPES**

If levels describe a person's values, and lines describe a person's development through various capacities, types can be described as their individual expression of those values and capacities. When we talk about someone's personality, we are usually referring to a conglomeration of their types.

Types are an important element to consider as they complete the portrait of an individual and are sometimes conflated with levels or lines. An example of this is observing someone yelling at someone else and assuming they are at the red level (impulsive rage) in that moment, where they may just have an aggressive anger style. Dozens of ways to assess types have been developed over the past several decades such as Enneagram or Myers-Briggs, choose the typological system that works best for you.

Types are rarely binary, a person usually exists somewhere on a spectrum between different types, and may evidence different typological behaviors in different situations.

The Integral Agile Approach uses Types primarily to facilitate better team chemistry and collaboration. All people have a preference for how they like to be communicated with, how they process information, how they express themselves, and the role they are best suited for in the context of their particular team. Unless a person (or a team) has taken a typological

assessment, their experience will be a feeling of “do we fit” or “is it easy for me to succeed” here without knowing why they feel better on some teams than others.

Like everything else in the IA Approach, bringing awareness to a person’s distinct typology gives them and their teammates the opportunity to choose to adapt how they’re working together for their mutual advantage. Here’s an example from an Agile coach (should I say it’s me?) working with another coach on his team.

*“I was a part of a team of about 20 coaches working in a large, global enterprise. I was located near the business center, and was partnered with another coach who was in a different part of the country where most of the technology teams were located.*

*I began my engagement with this organization a couple of months previously to establish the business objectives and get a sense of how they were organized. When I began collaborating with my new partner, let’s call him Mike, there was a lot of information to transfer, and a lot for him to observe and assess on the technology side. I found the first month of working with him to be frustrating, and I’m sure he felt the same way. Two coaches working across the country with an over 1,000 person organization with 100s of stakeholders meant there was a lot of information to share to make sure we stayed in sync. I was always feeling the pressure of time, so I did my best to communicate as clearly and quickly as possible. Mike on the other hand was never in a rush. He spoke slowly, asked a lot of questions, and took long pauses. My experience working with him was alternately ‘CAN YOU JUST UNDERSTAND ALREADY??’ when I was communicating with him, and ‘CAN YOU PLEASE GET TO THE POINT???’ when he communicated with me.*

*A month after Mike & I began working together my whole coaching team had our annual team planning offsite week. Among the many activities*

*scheduled during that week was a typological assessment intended to help us better work together as a team. Our team had a lot of fun taking the assessment and working with the folks who helped us understand the results. People love learning more about themselves and the people around them, comparing the results, and finding new ways to connect.*

*When Mike and I sat down to compare our results, one element that stood out was the way we each processed information. I like drinking from the fire hose - lay it all out in front of me as quickly and completely as you can. His preference is to take in each data point individually, process it then move onto the next one.*

*An external observer might have been able to point this out, but then you'd be paying for a coach to coach the coaches, then who would coach those coaches? Since no organization has the budget for recursive coaches going on into infinity, this assessment gave us a nifty little insight.*

*It would be impossible for him to speed himself up to my speed, his brain just didn't work that way, just like he had ways of doing things that would be difficult or impossible for me to replicate. It was no issue for me, however, to slow myself down and make sure he had absorbed each piece of information before moving onto the next once I became aware of the need. The result might not have been the speed that I preferred, but things between us became a lot more efficient and harmonious.*

*When I stopped making him wrong for something he had no control over, we suddenly started working better together."*

Types can also be used as a personal development tool to understand which aspects of a person are innate, and which are products of our environment - nature or nurture. In the example above, Mike's information processing speed is part of how his brain is wired, and, like everything else

in life, comes with benefits and drawbacks. Forcing himself to try to process more quickly would result in a decrease in performance for him in the long run. If however he happened to be a person who feels like he needs to play it safe but wishes he was more of a risk taker AND his avoidance of risk is a learned behavior based on past experiences, he could choose to start building up his tolerance to risk until he found himself screaming at the top of his lungs in a skydiving free fall.

Knowing which elements of yourself are innate and should therefore be accepted and enabled versus which elements are malleable and can be changed with effort is very valuable information if you enjoy personal development work.

People live in bubbles of unconscious bias. Our perceptions and preferences mean we are literally living in different realities depending on how we appreciate these 5 models:

- Holons: Am I perceiving the whole system along with the WHOLE PARTS that comprise it?
- Quadrants: Am I more feeling or data driven?
- Levels: Do I value rules, results, or relationships more?
- Lines: Which areas of my life do I strive for the above more?
- Types: How do I express myself and appreciate the world around me?

While it's possible to collaborate without the map of the hundreds of permutations that make us who we are, we will always be plagued with frustrations and impediments that are invisible to us and therefore persist despite our best efforts to solve them.

Enter the Integral Agile Approach

**WHERE DO YOU WANT TO GO?**