

ICAgile Learning Roadmap Agile Coaching Track

Version 2.0

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SPECIAL THANKS

For the Agile Coaching Track, ICAgile would like to give special thanks to the following Track Founders (2011):

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CONTENTS

2	LICENSING INFORMATION
3	SPECIAL THANKS
4	TABLE OF CONTENTS
6	FOREWORD
7	THE AGILE TEAM FACILITATION STEP (ICP-ATF)
7	THE AGILE COACHING STEP (ICP-ACC)
7	THE AGILE COACHING FOR ENTERPRISES STEP (ICP-EAC)
7	AGILE COACHING INFLUENCE AND IMPACT
8	STATE OF THE LEARNING PATH
9	HERE IS WHAT'S STILL LEFT TO DO...
9	CHANGE NOTES FOR VERSION 2.0
11	HOW TO READ THIS DOCUMENT
12	LEARNING OBJECTIVES
12	1. DEVELOPMENT IN THE AGILE COACHING DISCIPLINE
12	1.1. Development Path for Agile Coaching
12	1.2. The Agile Team Facilitation Mindset
13	1.3. The Agile Coaching Mindset
14	2. COACH AS FACILITATOR
14	2.1. Foundational Facilitation Skills
15	2.2. Conducting a Facilitated Session
16	2.3. Facilitating Collaborative Meetings
16	2.4. Skillfully Facilitating the Agile Practices
17	3. COACH AS PROFESSIONAL COACH
17	3.1. Foundational Professional Coaching Skills
18	3.2. The Coaching Conversation – Coaching for Action
18	4. COACH AS MENTOR

18	4.1. Key Mentoring Skills
19	4.2. Mentoring Agile Role Transitions
20	5. COACH AS TEACHER
20	5.1. Key Teaching Skills
21	5.2. Agile Mindset Shifts and Frameworks
21	6. COACH AS TEAM COACH
21	6.1. Foundational Team Coaching
22	6.2. Describing Team Development
22	6.3. Coaching the Journey toward High Performance
23	6.4. Handling Conflict and Dysfunction within the Team
24	6.5. Handle Organizational Impediments
24	7. SET BOUNDARIES FOR AGILE COACHING
24	7.1. Coaching Alliances and Contracts

FOREWORD

WHY AGILE COACHING?

Change. The *Agile Manifesto* changed the world. It introduced us all to the idea that change can be harnessed and celebrated. It provided us values and principles upon which to stand and from which to build practices that help us keep pace with an ever changing world. It taught us that change is the only constant, and that it should be embraced.

But, it didn't change the human truth that change is hard, and in the face of constant change, we can be lost, hurt, confused, or left behind. Change challenges our thinking, our world-view, and our self-view.

Agile coaching is a craft intended to guide others in understanding, processing, and embracing constant change, so that the change is sustainable, lasting beyond the individuals.

Agile coaches guide individuals and teams to get clear about the change they desire, identify places where current reality does not match desired reality and then take action to close the gap – all in service of delivering business results that matter. Along the way coaches hold the bigger view of desired change, even when others may have lost sight. Agile coaches support, guide, coach, teach, mentor and facilitate change without colluding with the current reality.

The Agile Coaching Track provides a development path in skills needed by agile coaches. Through the track, agile coaches learn progressively more complex skills, and receive exposure to rich areas of further self-development beyond the classroom. Agile coaches bring their whole self to the work, weaving together skills from professional facilitation, professional coaching, mentoring, and teaching. They do this in service to teams, to cause change, navigate conflict, intervene, and guide teams toward joyful high performance.

The track's two knowledge-based certifications describe *steps* of development in Agile Team Facilitation (ICP-ATF) and Agile Coaching (ICP-ACC); this is followed by a competence-based ICAgile Expert step (ICE-AC) intended for those who are practicing agile coaches. The content a learner will experience in the knowledge-based certifications is necessarily “a mile wide and an inch deep” because they are experiencing a confluence of professional disciplines that each have their own deep roots, techniques, and craft. It is expected that learners will find compelling areas to further study, in their service to the work and teams. By design, expertise in the learner is not presumed simply by engaging in the classroom; rather it is demonstrated at the ICAgile Expert step, based on demonstrable competence and peer review. To effectively operate at each step, there is an increasing level of skill, gravitas, and scope of influence expected.

What follows are steps in a development path. They are not roles or jobs. Organizations will create roles and positions that may or may not map to these steps, but we strongly encourage the perspective that all of these skills are necessary for everyone functioning as an agile coach, no matter their scope or level of influence. Broadly, those steps are described below.

THE AGILE TEAM FACILITATION STEP (ICP-ATF)

Operating at the team facilitation step, agile coaches learn the core skills of facilitation and gain the self-leadership needed to use them well. For those working with teams on-the-ground, facilitation skills are the first step because they pave the way for teams to achieve true empowerment, collaboration, and ownership of their actions and decisions. In this way, facilitation skills help the vision of agile-done-well come true.

This step is important for coaches operating at any level of an organization or scope of influence, whether that is with one team, a group of teams, an executive team or a whole organization. Further, the skills learned at this step may also provide value for learners in other disciplines, such as product ownership, technical leadership, or delivery management. Finally, although it is the first step in this development progression, it is not “for beginners only.”

THE AGILE COACHING STEP (ICP-ACC)

At the Agile Coaching step, the coach has expert-level understanding of current lean-agile practices; is significantly skilled in team facilitation; and has developed some professional coaching and mentoring skill. Coaches with these skills are likely operating at a scope of several teams or a program, starting new teams, mentoring others, or spending significant time working with managers and engaging with impediments outside the direct control of teams.

THE AGILE COACHING FOR ENTERPRISES STEP

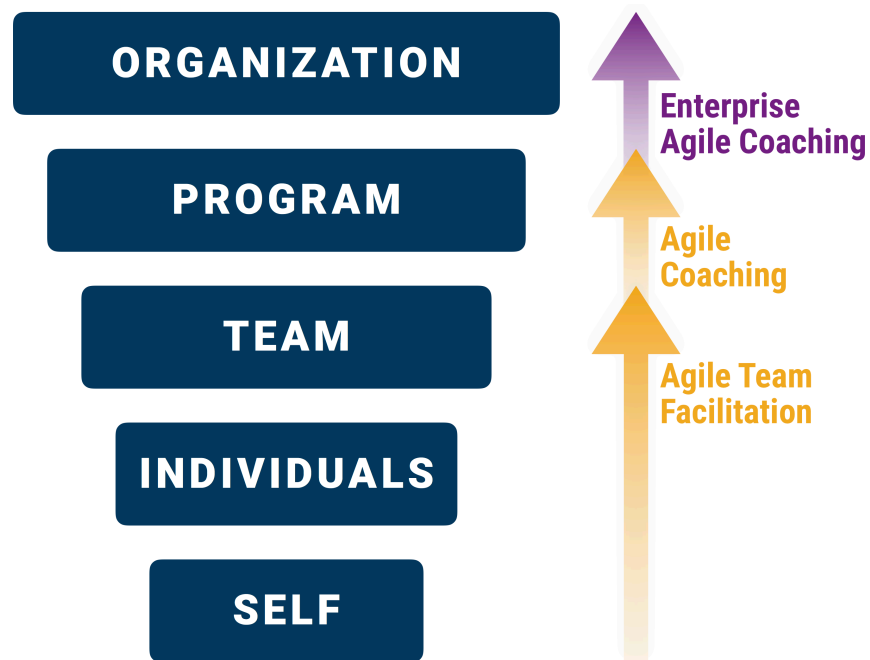
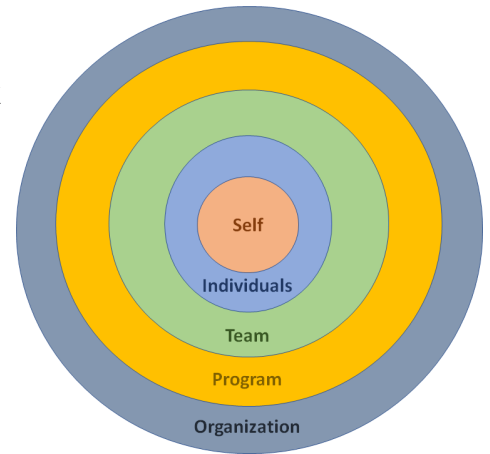
Coaches operating at this enterprise coaching step (which is addressed in another ICAgile track called Enterprise Agile Coaching) have developed advanced systems coaching, organizational development, culture, change management and leadership skills and uses those skills to affect organizations at large. An Enterprise Agile Coach works at all levels in an organization to help the organization use agile as a strategic asset for business value generation, which often includes culture change.

AGILE COACHING INFLUENCE AND IMPACT

This diagram articulates the different spaces of impact, change, and intervention where Agile Coaches may interact – where they have to work. This track emphasizes that to effectively impact the outer bands, one must have done the work on the inside – starting with the self.

The Learning Objectives (LOs) in the Agile Coaching Track focus on competencies required for self, individuals, team and program level impact. The Enterprise Coaching Track builds upon the LOs in this track and adds a focus for Program and Organizational level impact.

The scope of leadership expands, self, team, multi-team, enterprise, one's leadership, focus, capability and gravitas needs to also grow to be effective at those different levels.



STATE OF THE LEARNING PATH

As we look at the state of the learning path for agile coaching it can be summarized as “we’ve come a long way and there is still a long way to go”.

What’s been accomplished since 2011? The learning path for agile coaching has:

- Established a common vocabulary.
 - The discipline of agile coaching has been defined, with a common language and agreed-upon core skills. Coaches growing in the discipline, and companies hiring for the skillset, benefit from this commonality.
 - Provides practitioners with a path for personal growth and development.
 - Articulates agile coaching versus other services like consulting and organizational improvement.
 - Differentiates between facilitation, professional coaching, mentoring and teaching.

- Created an introduction to deeper learning paths.
 - This track covers a wide breadth of knowledge and competency areas and is designed to provide an overview, not mastery. Many students of this learning path have gone to further their education, well beyond the objectives outlined in this path.
- Normalized the importance of professional coaching and professional facilitation.
- Organizations commonly use ICAgile accreditation as a way to discern high quality in the training classes they offer to their employees as well as in those they hire as coaches.
- As of May 2018, ICAgile has accredited more than 70 courses for the Agile Coaching track, and more than 11,700 certifications have been awarded to approximately 9,110 individuals by these courses. More than 60 individuals have achieved the ICAgile Expert level.

HERE IS WHAT'S STILL LEFT TO DO...

As we look to the quality of Agile Coaching in the community at large, we see an improvement since 2011, but it's not enough. We are convinced that classroom learning is not sufficient. The two certifications these Learning Objectives yield are continuing education certifications only. They do not prove competence, and competence is what's needed. To address this gap, we encourage training organizations to create practice and competence building programs that take the learner to the ICAgile Expert level. When this occurs, we believe will see Agile Coaches who more often:

- Possess on-the-ground knowledge not only of Agile practices, but also of Agile principles and values
- Keep up with innovations in Agile frameworks and practices
- Achieve depth and measurable competence in the four skill areas of this Learning Path
- Consciously develop their “speciality” such as Technical, Business, or Transformation Agile Coaching
- Actively seek ways to continually practice, practice, practice

CHANGE NOTES FOR VERSION 2.0

- Reorganized core skills of teaching, mentoring, professional coaching, and facilitation to a common flow and organization.
- Further defined the foundational teaching skills that practitioners in the Agile Coaching discipline should have.
- Combined duplicative or similar LO's for team development, team performance and conflict.
- Revised the LO's to focus on the skills and competencies of agile coaching as a discipline and removed language that referred to a particular role i.e. Agile Team Facilitator.
- Clarified which LO's should be practiced/demonstrated instead of simply “taught.”
- Tailoring the agile ceremonies - the course designer may select the ceremonies they wish to cover in addition to retrospectives and standups.

- Removed these topics because we believed they could be better addressed as potential Deep Dive topics:
 - Techniques for protecting the team boundary from distractions that reduce team focus.
 - Strategies for dealing with different team situations (co-located vs geographically distributed, (e.g. Co-located / Virtual; Ongoing / Temporary; Single Organization / Cross-Organization; Same Culture / Culturally Diverse)
 - Development for teams versus working groups
- Identified the following areas as possible Deep Dive topics (this is not intended to be a complete list):
 - Dialogue
 - Agile Coaching in Government
 - Advanced coaching skills for individuals or team
 - Virtual facilitation
 - Large group facilitation
 - Facilitating intense/intractable conflict
 - Experiential teaching
 - Team development for remote teams
- The use of Key vs Foundational in Learning Objective names is intentional. Key denotes the short list of “first” skills in a discipline. Foundational denotes the key skills one must master to move forward in a deep discipline.

HOW TO READ THIS DOCUMENT

This document outlines the Learning Objectives that must be addressed by accredited training organizations intending to offer ICAgile certifications for each step in the Agile Coaching Track.

Each LO follows a particular pattern, described below.

0.0.0. Learning Objective Name

Additional Context, describing why this learning objective is important or what it is intended to impart.

The learning objective purpose, further describing what is expected to be imparted on the learner (e.g., a key point, framework, model, approach, technique, or skill). In cases where a learner is expected to gain learning through having an experience of the concept or practicing it, the Learning Objective Name will be preceded with the keyword "PRACTICE."

LEARNING OBJECTIVES

1. DEVELOPMENT IN THE AGILE COACHING DISCIPLINE

1.1. DEVELOPMENT PATH FOR AGILE COACHING

1.1.1. Defining an Agile Coaching Development Path

Effective Agile Coaching requires that people take their development one step at a time, obtaining competence at each step before moving on.

Outline the steps for someone developing themselves in the discipline of Agile Coaching. Someone operating at the Agile Team Facilitation step is knowledgeable in Agile practices, and is developing the fundamental skills in facilitation, as well as the self-leadership needed to coach a self-organizing team. At this step, it is common to work with one or a few Agile teams. At the Agile Coaching step, one has achieved an expert level in Agile practices and one or more knowledge domains (e.g., technical, business, transformation) while having developed functional professional coaching, mentoring and teaching skill and a significant level of skill in facilitation. Someone at this step commonly works at the scope of one or a few teams, and as they develop more demonstrable competence, their scope may expand to the multi-team or program level (more than 100 people). To operate at each step, there is an increasing level of skill, gravitas and scope of influence expected.

1.1.2. Assessing One's Ability to Serve the Team

Agile Coaches at all developmental levels respect the boundaries of their abilities and call for assistance when needed.

Set the expectation that Agile Coaching is a multi-person event. Successful Agile Coaches (at any level) do not go it alone. Instead, they call on the skills and knowledge of the next developmental level when faced with situations they are not equipped to handle. They also call on their peers at the same developmental level when they need a sounding board or partner. These are opportunities for the team to receive the level of skill needed and for the Agile Coach to learn from pairing with mentors and peers.

1.2. THE AGILE TEAM FACILITATION MINDSET

1.2.1. Definition of Facilitation

Facilitation is helping a group identify common objectives and offering group processes to achieve those outcomes while maintaining neutrality.

Level set on the definition of a facilitation as a neutral process owner for group work and decision making.

1.2.2. Definition of Agile Team Facilitation

Professionals operating at the Agile Team Facilitation step keep an Agile team running and growing.

Define the purpose, mindset and functions of a professional operating at the Agile Team Facilitation level of skill. At the most basic, the purview of someone at this step is to facilitate Agile practices and daily interactions to foster collaboration and healthy self-organization. Professionals at the Agile Team Facilitation step behave in ways consistent with Agile and are Agile role models.

1.2.3. The Facilitation Mindset

Effective facilitators consciously embody key beliefs and principles that inform and underlie their actions as they engage groups in processes to achieve their desired outcomes.

Introduce and help the learner embody the beliefs and principles of effective facilitators such as self-awareness, self-management, neutrality, group awareness, group process, and conveying openness and enthusiasm while maintaining an allegiance to the 'power of teams' over individual contributors.

1.3. THE AGILE COACHING MINDSET

1.3.1. Definition of Agile Coaching

Professionals operating at the Agile Coaching step make conscious choices about their actions in the service of teams.

Provide guidance on how to choose and/or combine the four basic skills in each moment (coaching, facilitating, mentoring and teaching) that will best serve the situation. Practical advice on which to choose and how, along with skills to cultivate the needed self-awareness and self-management, are taught in this LO.

1.3.2. Coach as Agile Role Model

Effective Agile Coaches are the "first Agilist."

Make the case that personally embodying the Agile values and principles is a key component of being an Agile Coach, and is gained through real-world experience with agile delivery.

1.3.3. Achieving Essential Mindset Shifts

Effective Agile coaches successfully make some key mindset shifts and serve as a living example of how one can thrive within these new mindsets.

Introduce key mindset shifts and help learners see ways to live these shifts in their own lives. Key mindset shifts may include: focus on team improvement over specific results; focus on business value-driven delivery over achieving scope, schedule or budget targets; focus on the leverage in the present moment over the past or future; focus on staying curious and seeing the best in people over judging or manipulating; focus on assisting the team in achieving their commitment and learning when they do not achieve it rather than stepping in and doing it for them; employing a "servant as leader" style rather than "telling" style (see Robert Greenleaf).

1.3.4. Achieving Self-Awareness/Self-Management in the Coach

Self-management is a critical Agile Coaching skill that can be learned and increased.

Introduce one or more models of self-awareness that impact one's ability to be an effective Agile Coach. Further, this LO is concerned with giving the learner techniques for managing themselves, their biases, assumptions and emotions within a coaching context. To be effective, the Agile Coach must be both self-aware (e.g., know when she is biased about a given topic) and use self-management (e.g., not let her bias affect how she facilitates the meeting). There are many models of self-awareness (e.g., emotional intelligence, Myers-Briggs, various personality inventories, various self-awareness mindfulness techniques) that can guide the coach. Most important is to choose at least one model and apply it.

1.3.5. Agile Coaching Stance

An Agile Coaching stance gives a coach something to hold onto – a center, an anchor – in their professional storms.

Guide the learner into understanding an Agile Coaching stance -- a blend of their skills and attitudes they will need to hold-to in the work of Agile Coaching: a mindful “how to be.” An Agile Coach blends their core skills of facilitation, teaching, professional coaching and mentoring, along with other relevant skills and attitudes -- perhaps related to conflict navigation, interpersonal communication, individual change or technical craft (as examples). The intent is that the coach-at-work should consciously consider and choose from their stance, as they partner with teams and individuals for their success. As a matter of instruction, a model Agile Coaching stance could be provided, or the learner may be guided into designing their own.

2. COACH AS FACILITATOR

2.1. FOUNDATIONAL FACILITATION SKILLS

2.1.1. Defining the Purpose and Outcomes

Effective meetings have clear purpose and outcomes. These are best defined by the person with the most at stake from the outcome.

Provide the learner with planning tools and techniques to clearly identify the purpose and intended outcomes of the meeting in collaboration with the meeting sponsor(s).

2.1.2. Design the Flow

Facilitators use the desired outcomes to design the meeting flow, a series of activities that help the group achieve their desired outcomes.

Enable the learner to design a facilitator guide, with intentional group process to achieve the desired purpose and outcomes. Consideration is given to the overall arc of the session, expanding and contracting ideas, group energy levels, selecting the right participants, scoping the session to the time allowed and identifying potential issues.

2.2. CONDUCTING A FACILITATED SESSION

2.2.1. Maintain Neutrality

Neutrality is the facilitator's ability to focus on the group process and suspend judgments on the content of the meeting.

Teach the importance of neutrality and how its absence can erode trust, decrease full participation and result in a less effective decision. Provide the learner with techniques and methods for maintaining neutrality.

2.2.2. Create a Collaborative Space

Collaborative spaces create connections, foster trust, allow for silence and welcome differing points of view.

Provide the learner with examples of what creates versus what detracts from collaborative space (i.e., room configuration, working agreements) and provide them with techniques that foster collaborative spaces.

2.2.3. Facilitating Full Participation

Great ideas come when all team members are involved, engaged and all ideas are freely shared.

Expose the learner to different techniques to garner full participation without promoting chaos (e.g., brainstorming, silent working, prioritization, multi-voting).

2.2.4. Using the Meeting Organizing Tools

Facilitated meetings are well structured and organized to provide consistency to the participants.

Provide the learner a suite of common meeting tools, their purpose, and when and how to use them. Facilitators use a variety of meeting organization tools, including parking lot, group norms and room setup.

2.2.5. Facilitating Collaborative Conversations

It's common for conversations to be mediocre – improving conversation quality leads to better understanding, fuller collaboration and remarkable results.

Give learners techniques to facilitate better, more meaningful collaborative conversations by maintaining awareness of one's own style, gaining understanding and acceptance of other styles, seeing and working with conversational patterns and increasing the capacity to give and receive feedback.

2.2.6. Clarify team decision-making authority

Being able to come to decisions is a critical function for a team, frequently problematic, and essential for moving teams to action.

Emphasize the importance of being intentional when clarifying the scope of decision-making authority of the team based on what decision is being asked of them.

2.3. FACILITATING COLLABORATIVE MEETINGS

2.3.1. Facilitating Agile Framework Meetings

The connection between the purpose of an Agile ceremony and the underlying principles/values it expresses must be made explicit so that Agile ceremonies do not become empty rituals.

Convey the purpose and the underlying principles/values that are satisfied in each of the meetings in the Agile framework(s) pertinent to your course. This can be delivered as written information and does not need to be explicitly covered real-time in the classroom.

2.3.2. Facilitating Retrospectives

Retrospectives are one of the essential practices to ensure the team inspects and adapts its behavior and process. Retrospectives can either help the team continuously improve, or can create team dysfunctions.

Familiarize the learner with facilitation techniques for retrospectives and help them know when and how to use them to design and conduct retrospectives suitable for the team's current situation. This LO conveys the key elements (e.g., trust, safety check, ground rules, prime directive) that help retrospectives be productive and also illustrates how to work through common pitfalls (e.g., turning into a complaint session, lack of safety, fear of repercussions, non-collaborative).

2.3.3. Facilitating Stand-ups

Stand-ups are the heartbeat of the team's cadence providing cohesion and commitment. Stand-ups can either launch the team into their work or become an empty, depleting ritual.

Relay techniques to keep the stand-up purposeful. This LO emphasizes facilitation that safeguards the stand-up as a venue for daily commitment, raising impediments, and keeping momentum while avoiding common pitfalls (e.g., going longer, reporting in, turning into a status meeting, veering into the purpose of another meeting, disengaged members, becomes boring).

2.3.4. Facilitating Selected Agile Meetings

The most vital Agile meetings in the Agile framework(s) you teach will be brought to life through facilitation methods that increase collaboration and ensure that Agile meetings remain real work.

This LO gives flexibility as to which Agile meetings get covered at a deeper level during the class. Retrospective and Stand-Up, plus 3 or more other Agile meetings from the framework(s) of your choosing, must be covered in a way that illustrates facilitation methods for amping up success and avoiding pitfalls.

2.4. SKILLFULLY FACILITATING THE AGILE PRACTICES

2.4.1. Design and Facilitate an Agile Meeting

The ability to neutrally facilitate a session cannot be gained by reading or lectures alone, but only by doing it.

Provide an opportunity to practice some of the facilitation skills and mindsets they have just learned in the context of an actual meeting that occurs within an Agile framework.

2.4.2. Adjusting Facilitation Given Team Maturity

It's essential to be able to change one's facilitation style based on the maturity and needs of the group.

Provide exposure to and/or the opportunity to practice facilitating under different conditions of team maturity. A planning meeting for a team new to Agile will look and flow differently than for a team that has been practicing this way for years. Thus, the facilitation style and emphasis will be different: the teams need different things from the facilitation. Experientially deliver this contrast, using any Agile event as an example.

3. COACH AS PROFESSIONAL COACH

3.1. FOUNDATIONAL PROFESSIONAL COACHING SKILLS

3.1.1. Basics of Using Emotional Intelligence as Underpinning

Developing one's emotional intelligence (EQ) is necessary for using professional coaching skills in service of others.

Introduce one or more models for emotional intelligence and make the connection that EQ is the underpinning for professional coaching skills because it enables self-awareness and self-management.

3.1.2. Presence

Being fully present as a coach is key to successful coaching. Methods for presence include building rapport, awareness of the environment, self-management and consciously preparing for coaching.

Teach the importance of presence and provide the learner with techniques and methods for achieving it.

3.1.3. Listening

Listening is more than hearing; and, it is a skill that is often taken for granted. To be of service, coaches must develop their listening skill.

Teach the importance of listening and provide the learner with at least one model or technique for developing their listening skill.

3.1.4. Powerful Questioning

Powerful questions are open ended, thought-provoking questions that trigger curiosity and stimulate creativity / new insights. For example, rather than asking "Did that work?" regarding an action the client took, the coach may ask "What did you learn?"

Familiarize the learner with the concept, examples and application of powerful questions.

3.1.5. Giving and Receiving Feedback

Being able to openly receive and provide effective feedback that builds people up instead of tearing them down is essential to helping individuals achieve their potential.

Provide the learner with techniques for giving effective feedback to coachees and being open to receiving feedback from coachees and other coaches.

3.2. THE COACHING CONVERSATION – COACHING FOR ACTION

3.2.1. Issue Identification

Coaches must be able to help the coachee identify the issue to be worked; often, it is deeper than what the coachee initially presents.

Introduce techniques for coaching others as they identify the issues they want coaching on. This may involve sorting, prioritization, uncovering underlying issues, etc.

3.2.2. Issue Exploration

The majority of the coaching conversation is spent in exploration.

Techniques might include listening, reflecting non-verbal communications, brainstorming, perspective shifting, asking open-ended questions, values clarification, etc.

3.2.3. Action Commitment

The coaching conversation successfully completes when the coachee moves into action of their own choosing.

Introduce techniques for helping the coaching client move into effective action after she/he has identified and explored the relevant issue, thereby helping the client take responsibility for their actions and their results.

3.2.4. Conducting the Coaching Conversation

It is important to experience using the concept of a coaching conversation in a realistic Agile setting.

Practice having a coaching conversation from beginning to end using Foundational Professional Coaching Skills, to identify the issue(s) for coaching, explore the issue and help the client come to an action commitment.

4. COACH AS MENTOR

4.1. KEY MENTORING SKILLS

4.1.1. Give Advice While Maintaining Presence

The act of giving advice is a cornerstone for mentorship. The best mentors give advice in the service of their mentee, figuratively or literally by their side.

Introduce the learner to at least one advice giving technique that maintains full presence in order to further the mentee's agenda.

4.1.2. Articulate Expertise

You can't mentor someone in something you don't know more about than them.

Clarify the connection between one's expertise and their ability to mentor, emphasizing that mentoring skills cannot be applied in areas where one's expertise is less than the mentee.

4.1.3. Mentee at Free Choice

Actions freely chosen by the mentee are more likely to happen.

Explore the inherent tension between giving direct advice as a mentor balanced with helping the mentee explore options for themselves and offer at least one method to honor the mentee's free choice. Mentors should use their power wisely to help mentees make choices that are right for them, rather than pushing their own agenda.

4.2. MENTORING AGILE ROLE TRANSITIONS

4.2.1. Contrasting Mentoring with Coaching

Knowing when to coach and when to mentor is a critical skill for coaches when working with individuals in transition.

Contrast coaching and mentoring, exploring situations in which one might be preferable over the other.

4.2.2. Understanding the Individual Change Cycle

Whether they are just beginning in Agile environments, or as they develop into skilled practitioners, individuals on Agile teams are confronted with the need to learn new skills, develop new mindsets and engage in new relationships with their colleagues. In short, they are required to change.

Introduce one or more models for how individuals change, grow and learn. Such models should distinguish between self-chosen change and organizationally imposed change. It should also emphasize the need to "meet a person where they are" in their change process, rather than the coach imposing her/his beliefs or needs.

4.2.3. Key Agile Role Transitions

Everyone goes through some kind of transition in their role when they encounter Agile methods and an Agile Coach clearly articulates that transition.

Provide an overview of the typical transitions faced by the people in various roles and/or responsibilities when Agile is brought in, such as analysts who move out of the customer/team intermediary role, testers who become part of the up-front action, product owners who focus on the "what" and "why" of the product and Agile managers who become creators of Agile environments. This LO presents key transitions so that Agile Coaches can easily articulate them. (Which roles and their

transitions to be covered will be dependent on the Course Designer's beliefs about Agile roles and their business context.)

4.2.4. Identifying and Handling Resistance from Individuals

Agile Coaches use resistance rather than resisting resistance.

Help the learner decipher how to work with resistance from individuals as they take up their Agile roles, rather than seeing resistance as an indication of failure or something to be solved. In this LO, the learner is exposed to at least one model for working positively with resistance.

4.2.5. Conducting the Mentoring Conversation

It's important to integrate the skills of mentoring in a mentoring conversation about a real-world Agile situation.

Practice mentoring skills (which may also include coaching skills) in a realistic Agile setting. This includes establishing and maintaining presence with a mentee, articulating expertise and sharing experience, and keeping the mentee at free choice.

5. COACH AS TEACHER

5.1. KEY TEACHING SKILLS

5.1.1. Use Multiple Content Delivery Mechanisms

Individuals have a personal learning style. It is essential for the teacher to consider and use multiple styles to ensure broadest impact.

Orient the learner to the personal nature of human learning and provide an overview of techniques (e.g., visual, auditory, tactile, experiential, lecture) that should be considered when designing learning experiences.

5.1.2. Chunk Content into Digestible Pieces

You should not try to eat an elephant in one bite.

Expose the learner to strategies for breaking up learning experiences into pieces that are most likely to take root and help the learners to maintain focus. It is likely that this LO will draw parallels or direct connections to facilitative techniques described elsewhere in the course.

5.1.3. Check for Understanding

Silence is not agreement or understanding. New ideas do not always land well, or at all.

Introduce techniques to help learners assess the impact and understanding of a new idea within a student or group. It is critical for coaches not to simply ask students "Do you understand?" and accept nodding heads as a positive indicator of understanding. Coaches may use many different techniques for "checking-in", including: repeating back (asking the student to repeat the new idea), discussing the new idea and its implications, teaching back (asking the student to teach the

new idea) and reporting out (ask the students to report in with new experiences based on the new idea).

5.1.4. Create an Environment for Stickiness

Casting a new idea is the start -- not the end -- of the teacher's role.

Arm the learner with at least one strategy, model or technique that promotes lesson stickiness (e.g., 10m/24h/7d).

5.2. AGILE MINDSET SHIFTS AND FRAMEWORKS

5.2.1. Helping Team Members Experience the Agile Mindset Shifts

Foundational Agile beliefs must be experienced, not just taught.

Convey the importance of helping team members experience mindset shifts such as value-driven priority, self-organization or empirical process improvement through experiential learning.

5.2.2. PRACTICE: Distinguishing and Articulating at Least One Agile Framework

Agile Coaches know one or more Agile frameworks 'stone-cold' and can fully articulate at least one clearly, simply and quickly.

Help the learner develop the capability to articulate and teach at least one Agile framework, including its associated roles, common practices, values and principles.

6. COACH AS TEAM COACH

6.1. FOUNDATIONAL TEAM COACHING

6.1.1. Systems View

Team coaching includes looking beyond individual voices and seeing the system itself.

Introduce concepts around shifting the coach's focus from individuals to a whole-system perspective. This involves looking at the system of all humans involved, and the connections between them in order to see it truly as an outsider. Everything that happens in a system is data about how the system operates.

6.1.2. Observation

An Agile Coach must develop muscles of observation apart from interpretation and evaluation.

Help the learner see with neutral eyes to differentiate between the facts of observation (as a video camera would capture it) and analysis, interpretation, judgment or evaluation.

6.1.3. Articulate What's Happening

Being able to name what you see, in a non-judgemental way, creates awareness for the system.

Help the learners voice their observations, in service of the system becoming more self-aware. The ability to present a neutral observation is one of the agile coach's most basic interventions. A system that can see itself may self-repair when unhealthy dynamics are present.

6.2. DESCRIBING TEAM DEVELOPMENT

6.2.1. Describing a Model of Team Development and Using it in Service of a Team's Development

Agile Coaches understand and use one or more models to illustrate how teams develop; they are able to use them to articulate where a team is and to help them take measured steps forward.

Introduce one or more models for how teams develop over time, and be able to use the model to inform their intervention with a team. This includes a group's conscious decision to become a team and a team's continued journey to high-performance. As examples, the coach may detect the team's current developmental level and use that information to inform the design of a team start-up, reset or recovery, or coaching "in the moment," with an intention of empowering the team to chart their own path.

6.2.2. Helping a Team Detect their Own Stage of Development

Agile Coaches develop a team's capability to detect their own stage of development and devise strategies to improve.

Convey the importance of raising the team's capacity for self-awareness, and ability to self-heal and self-improve. The coach can do this by sharing one or more models for team development and giving the team language and practice at naming what they see, identifying what's missing and what's needed next.

6.2.3. PRACTICE: Creating a Team Kickoff / Startup Agenda

Starting a team off on the right foot is crucial to the journey towards high performance.

Provide the learner with an opportunity to design a startup or re-set of a team using a real-world scenario. This would include elements such as helping the team get to know one another, create a culture, align on a vision, setting up their work environment [5] and establishing team agreements and/or ground rules.

6.3. COACHING THE JOURNEY TOWARD HIGH PERFORMANCE

6.3.1. Defining and Identifying High Performance

Teams will move in and out of different levels of team functioning on their journey to being a high performing team. Many teams will strive for high performance and never reach it, others will experience it for a moment in time and it will be gone.

Help the learner identify characteristics of a high-performing team and to help the team assess their performance and identify areas for improvement. The high

performing team model needs to support agile team performance characteristics (e.g., empowerment, shared leadership, vulnerability, resolving conflict, trust and continuous improvement).

6.3.2. Team Development is a Journey, not a Destination

Teams will move in and out of different levels of team functioning on their journey to being a high performing team.

Provide the learner with a context for understanding that teams go through cycles--moving from highly collaborative and productive to less productive and less collaborative--in addition to their developmental stages. This is a natural process and needs to be reflected back to the team, not seen as a failure.

6.3.3. Assessing the Team as a Healthy System

Teams will develop patterns of behavior and dynamics. Assessing a team in a moment, getting a snapshot of its behavior and norms, gives the Agile Coach information to understand its health or non-health.

Introduce one or more models for assessing healthy team functioning, especially the ability to identify clearly dysfunctional aspects. Provide suggestions for awareness of environmental elements typically outside the team's control (e.g., geographic distribution, teams that are really working groups, cultural misunderstanding).

6.3.4. Adapt Your Style Based on Team Maturity

Enhance the team's self-sufficiency by consciously choosing your leadership range (i.e., leading from the front or leading from the back).

Convey the importance of becoming intentional about one's leadership approach based on the team maturity and Agile maturity, and letting the level of direct involvement decrease as they mature and take on more themselves.

6.4. HANDLING CONFLICT AND DYSFUNCTION WITHIN THE TEAM

6.4.1. Surfacing and Working with Conflict

Conflict is a natural part of a team's development and learning process and is essential to their creativity and quality of work. Fear of interpersonal conflict can be an impediment to building a high performing team.

Highlight the importance of conflict in a team and provide the learner with the ability to surface conflict in a positive manner to improve the team's conflict competency. When conflict competency exists, team members feel more confident in their abilities to address conflict and hold one another accountable for their behavior and performance.

6.4.2. Building Self-Awareness/Self-Management Capacity in the Team

The same issues of self-awareness and self-management apply to the team as well as to the Agile coach.

Give the learner tools to use for both themselves and with their teams to increase the team's capacity for both self-awareness and self- management.

6.4.3. Creating Awareness that Teams are Human Systems

Teams are human systems that have their own values, perspectives, consciousness and truth.

Expose learners to the idea that a team is more than a collection of individuals, that it is a human system with its own characteristics, needs and growth potential. Further, show that moments of conflict or collaboration difficulty can be seen as human systems dynamics, rather than solely personal to the individuals involved. The learner will be able to begin seeing the team as a human system by bringing their awareness to this level, at least some of the time.

6.5. HANDLE ORGANIZATIONAL IMPEDIMENTS

6.5.1. Identifying and Capturing Impediments

The decision to adopt Agile at a team or organizational level will introduce varying types of change into the organization.

Introduce common organizational impediments and help the learner be able to help teams recognize and capture the impediments affecting them. Agile practices do not necessarily create new problems but they have a way of surfacing dysfunctions that already exist within an organization. Organization impediments that impact the team may be such things as organizational structure, physical office layout, hiring practices, career paths, training and development, compensation, rewards and recognition, leadership, etc. At this level, the purpose is not to solve these organizational challenges, but to mitigate their impact on a specific team.

6.5.2. Leadership Engagement

Organizational impediments limit team productivity and quality. Some impediments can be resolved by the team, others may need to be solved at higher levels in the organization.

Provide the learner with the ability to know when and how to engage leadership in solving organizational impediments.

7. SET BOUNDARIES FOR AGILE COACHING

7.1. COACHING ALLIANCES AND CONTRACTS

7.1.1. Defining the Agile Coaching "Contract"

When they begin work with a team and its business unit, effective Agile coaches make agreements with key stakeholders (e.g., management, the team) on how the coaching work will proceed. This involves those directly affected (e.g., the team) as well as those "paying for" or authorizing the coach's services (e.g., management or sponsor).

Convey the importance of a coaching contract, that it is not a "legal" contract but rather an agreement between the parties. How to negotiate such an agreement, why it's important to coaching success, how it helps bound what the coach agrees to do (e.g., start-up and run a new Agile team for three months) and what the

coach will not do (e.g., give performance management evaluations for team members), as well as what the “client” will do (e.g., provide training for the team, make a candidate Agile Team Facilitator available from within the team) are all components of this LO. Effective Agile Coaches, whether they are internal employees or external consultants, see their work similarly to that of a collaborative consultant (see for instance Peter Block, *Flawless Consulting*), which is why the coaching contract is an appropriate learning topic for all Agile Coaches.

7.1.2. Designing a Coaching Alliance

A coaching alliance is the other side of the coaching contract. Where the contract provides the conditions for the work (e.g., boundaries, time, roles), the coaching alliance empowers the Agile Coaching relationship.

Introduce key elements of designing a coaching alliance including creating rapport, key questions to ask, tone of the discussion and hoped-for outcomes. This is a two-way conversation wherein the parties assert what they need to create a powerful relationship, and negotiate for alignment. It answers questions such as how do the individuals or the team as a whole want to be coached? How would they like to receive feedback? How will the coach know when she has challenged the team “too far” or “not enough”? Will they help the coach get better at coaching them in the unique way they need to be coached?

7.1.3. Internal vs. External Coaches: Special Considerations for Contracting and Designing Alliances

Internal coaches and external coaches work under different constraints. Understanding the power and limitations of their situation helps the coach create stronger coaching contracts and alliances.

Discuss the key differences between internal and external coaches, identify the unique challenges faced by internal coaches (e.g., maintaining neutrality and confidentiality, holding people accountable, challenging the status quo) and that these are important topics to bring into coaching/alliance conversations. Familiarize the learner with the unique challenges of being an internal coach, and that it does not prevent them from maintaining the coaching stance (e.g., maintaining neutrality, not colluding, supporting the client's agenda). Familiarize the learner with the unique challenges of being an external coach, such as the need for effective systems entry, treating the client system with respect for the choices it has made, balancing challenge with respecting the pace of change that can be assimilated, etc..