

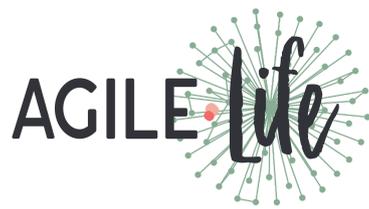
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ACTIONS TO
IMPLEMENT AGILE
IN NON-
ENGINEERING
TEAMS



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5 ACTIONS TO IMPLEMENT AGILE IN NON-ENGINEERING TEAMS

As a leader, you care about impact and you know the way to get there includes more than just a good idea; your team has to execute with efficiency, creativity, and focus. You also know that supporting your people is key and that means more than supporting each individual, but also supporting the team as a whole. You desire a team culture of trust, respect, transparency, continuous improvement, and purpose, but often feel that you all have room to grow

Do you sense that individuals are working in silos? Do you see signs that open communication isn't happening? Do you wish more open feedback was occurring? Do you feel that your team has untapped potential?

I was leading a team focused on creating learning experiences for educators and had these questions. We also had a number of specific challenges, which may be familiar to your management team. .



Common Challenges

- **Uneven workload** - Some team members constantly felt that were pulling more weight.
- **Challenges with scope** - We often underestimated what was needed to complete a project or allowed the project to become bigger than what was initially intended.
- **Hierarchy in the way** - Managers mostly acted as a pass through by delegating tasks and checking to be sure they were done.
- **Difficult to coordinate** - Hand offs often weren't timed well, bottlenecks often weren't identified early on, multiple deadlines were scheduled in the same week, and it was unclear who decisions makers were.

These logistical challenges led to more substantial challenges with some employees feeling undervalued or unheard and, overall, a lack of teamwork and clear purpose.

At the time, I was having lunch regularly with our software team lead and he talked a lot about agile methodology, which he used with his team. I saw the team seemed happy, collaborative, and celebrated successes frequently. I was down to try the methodology. We got training and adapted the practices to our circumstances and here are a few key practices to understand. .

1. ENSURE YOU HAVE THE RIGHT PROJECT LEADS.

First, we decided that anyone on the team could volunteer to be a project lead. Project leads were not assigned - they volunteered (or not). We also did not have a few defined project managers; in fact, we did away with managers of any sort. The team became completely "flat," or non-hierarchical. This was uncomfortable for some at first, but it became an important aspect of our culture. Everyone had the opportunity to step up and lead, and the ability to choose areas where they felt they had the most to offer.

Next, we met as a team and created essentially a job description for the project lead.

This ensured that every project was being led with consistent practices, so team members working across projects didn't have to figure out each lead's way of working. We outlined the duties and responsibilities of the lead, but, just as importantly, the responsibilities of the team. We asked not only, "What will the project lead do?", but also "What will the project lead not do?" This ensured that the project lead didn't end up independently accountable for the project's success.

We posted the description and shared it out. This structure put everyone on equal footing and distributed leadership throughout the team. This also eliminated the need for managers to spend a majority of their time delegating and ensuring tasks were completed, so we got more done.

2. GET CLEAR ON YOUR GOALS.

Again, may seem like common sense, but most teams are doing this wrong. You may think everyone knows what the goal is, but if you started asking detailed questions you would probably realize everybody is thinking about it just a little differently. Sure, people might say:

- We're creating marketing materials to sell the new course to teachers.
- We're writing a proposal to gain funding for our project.
- We're researching a report to spark policy change.
- We're adopting a new software system to monitor finances.

But when you get deeper, you may find people have different ideas. We used three questions to help us get clear on the goal:

Who?

Who are these teachers using the course? Are they experienced or new teachers? What age students do they teach? Who is the funder and what do they care about? Who will our project impact, specifically? Who will read this report - policymakers, new reporters? The specific user of the material, tool, or information is important for how you create it. Get specific. Keep asking questions until you have a very clear few of your ideal user.

Why?

Why does this person need the material, product, report, or information? In engineering this is often a key component of user stories [\[link\]](#) and is critical for understanding what value the user will gain from the work. Keep asking the question, "Why?", at least five times to understand at a deeper level why you are completing the project in the first place.

What next?

What actions do we want to the ideal user to take with this information, product, report? Often we want to get a finished product to a group of people, but we're not clear on what we want them to do with it. Do we want them to share it? With whom? Write about it? In what venues? Getting really specific about what we want people to do, helps us to understand what the end goal is.

This can be a fun, interactive conversation for the entire project team. Make sure you have a whiteboard, colored markers, sticky notes, and anything that helps you ask questions, share ideas, and collaborate. Usually this is led by the project lead, but if facilitating this type of conversation is not a strength of the project lead, she may ask for a volunteer to lead. Outcomes may be personas, flow charts, mind maps, or simply notes. The idea is to get everyone talking so you make differences in thinking transparent and ultimately get everyone on the same page about the goals of the project.

3. TASK AND ESTIMATE.

Without managers delegating and checking tasks off, how do you know who does what? And what are all of the things you have to do? So many times we don't fully scope a project before we get started. Tasking and estimating is the key to doing this well. This is also done as a group including everyone who is working on that project. We gather and start to list out every task that needs to be accomplished to complete the project. Here's the key:

No task should be more than four hours long.

Any longer and you introduce uncertainty. If we estimate a task to be 20 hours, we're probably wrong by at least 25%. If this compounds across multiple tasks, we end up way off in our estimates on when handoffs occur, what else can get done, and deadlines. So, making no task more than four hours forces you to break down the tasks into manageable chunks that can be estimated accurately.

Once you've gotten every task written down (preferably on individual sticky notes), team members volunteer for particular tasks. Yes, that is important:

Tasks are not assigned; they are volunteered for.



So, what if no one volunteers for certain tasks? They will. They will volunteer because you are a team working towards a common goal. You will see the less desirable tasks more evenly distributed. You will also see people volunteer for tasks you might not have thought to assign for them. This is a great way see what people are interested in, enable them to learn new skills, and cross train your team.

Next you start to estimate the tasks. Here's what's important to remember about estimating:

The person who does the work, estimates the work.

No one can tell another person how long it will take them to complete a given task. By volunteering for a task, you take responsibility for determining how long it's going to take you. Yes, it might take Nick longer than it takes Kira and that's OK. Nick may be branching out to learn a new skill so it takes him longer, but in the end it will benefit the team because you'll have one more person who can do that work and ensure you don't get bottlenecked. This takes trust - how do you know people won't overestimate so that they have to do less work? They won't because you are a team and they are accountable to the team. My experience was consistently that people would underestimate the time and end up with too much to do. We found that people tended to underestimate by about 20%

on average so we actually added that in as a buffer on future projects (more on this later in the article).

There were huge benefits to this practice - we were better able to estimate deadlines, coordinate handoffs, and define project scope. More importantly, we were building a culture of trust, continuous learning, and self motivation. Finally, it is through this practice that your team begins to become self-organizing. Once we fully adopted these practices, I found that my job was almost 100% forward facing and strategic because the team really didn't need day-to-day management. Sound good?



4. LOOK ACROSS PROJECTS

Looking across projects enables you to look at each team member's total workload and distribution of deadlines so that you can proactively identify any bottlenecks. Some of the key practices for looking across projects include:



Make it visual.



Once we had all of the index cards or sticky notes with tasks, estimates, and owner listed, the project lead would then organize them into weekly columns on a wall in shared workspace. We would actually tape the cards up on the wall so everyone could see them. There are definitely some great cloud-based project management tools out there - some of them devoted specifically to agile - and eventually we did change to an electronic tool, but for at least the first year we kept it tangible and visible. This helped to alleviate the barrier of introducing yet another tool - every team has a few late adopters or resisters that can slow the process. In addition, it helped to keep this new way of doing business top of mind and made it easier for us to adapt and make changes to the schedule on the fly, a key component of agile that we'll discuss in a moment.



Weekly Team Assessments

During this time, all teams come together to mark off what has been completed that week and identify any potential challenges for the week ahead. If a task was incomplete and needed to push to the next week, were there dependencies that also needed to move? When each individual looked across projects, did they have too much or too little work? Were there tasks we hadn't thought to include at the beginning of a project, but now realized needed to be included? Had anything changed or anything unexpected happened? Maybe we learned something new from user testing and therefore needed to slightly alter the goal of our project. That's OK, too. The idea isn't to prevent changes or challenges, but to identify them early and work them into our process.



Weekly Team Lead Work Session

This usually happened right after the team assessment. The team had identified all kinds of potential challenges and the team leads sat down to troubleshoot and identify solutions. While we called this the team lead work session because all team leads were always present, any others who wanted to could participate. Some of the key tenets of agile are transparency and lack of hierarchy, so no one was excluded. In fact, initially we did this session as a whole team, but most felt that it was more efficient with a small group of problem solvers and there was enough trust at that point that people were confident that they would be pulled in, as needed, and not volunteered for anything. As a compromise, anyone not involved in the team lead planning put a block on their calendar so they would not be called into any meetings and would be available for quick questions.



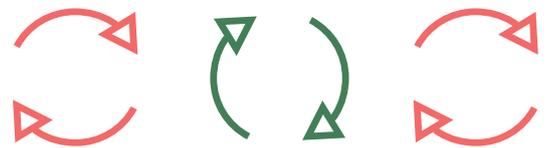
Daily Stand ups

The entire team gathered for a ten to fifteen minute stand up every morning to answer three questions:

- **What did you work on yesterday?**
- **What will you work on today?**
- **Any barriers?**

This allowed for tight coordination and quick discovery of obstacles. It was difficult, at first, to keep this to fifteen minutes or less. We instituted a practice following up in small groups after stand up if issues were raised or coordination needed to happen. So, we would uncover the challenge or need during stand up, but then discuss with only those involved in the issue directly following stand up.

This level of communication and planning ensured that workload was evenly distributed and no deadlines piled up on us at the same time. It helped us to uncover problems early (when they were small) so they didn't become big problems and, ultimately, these practices enabled us to have a larger impact because we got project done. By this point, we also saw improvements in team member's enjoyment of their jobs. We were able to take advantage of flexible work schedules while still collaborating meaningfully. There were fewer fires to put out so each of us was able to focus on purposeful work. And we knew we were creating high value work to serve others.



5. ITERATE AND ADAPT.

A key tenet of agile methodology is continuous improvement so reflection is key. This system is not set in stone, but is flexible. Daily stand ups not working for you? Do them three times per week. Figure out what works for your team. Fortunately, there are a few processes embedded in the system that allow us to do this.

1

Compare estimates to actuals.

When tasking and estimating, each person who has volunteered for a specific task will estimate that tasks. In the weekly team meetings, they will write on the task card how long it actually took them to complete the task. Monthly at first and, later, quarterly, we would tally these up and look at the average difference between actuals and estimates. This allowed us to come up with 20% buffer number. You also will begin to estimate more accurately (eventually the 20% buffer wasn't needed).

Reflection.

Engineering teams typically do a retrospective every sprint, asking what went well and what didn't go as well. Engineering teams also often do two or even four week sprints. This didn't work for our team for a variety of reasons, so we stuck to one-week sprints (see above, we did team assessment every week), but weekly retrospective seemed like too much. We already had weekly team meetings for team updates, such as company-wide announcements or discussions about hiring. Thus, we used a combination of bringing celebrations and challenges to the team meeting each week and doing a retrospective on each project as it was completed.

2

Through using these tools and processes we were able to increase our productivity and efficiency all while supporting flexible and remote work schedules. We were able to increase trust and respect, which impacted communication. We eliminate hierarchy and distributed leadership, which enabled us to pursue new ideas from all levels of the organization and foster leadership in all team members. We prioritized high value work and stayed focused on those priorities. Ultimately, we increased and sustained our impact, while positively impacting organizational culture and employee satisfaction.

Go deeper.

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