PROFESSIONAL COACHING FOR AGILISTS

ACCELERATING AGILE ADOPTION

DAMON POOLE | GILLIAN LEE

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Preface

We are excited to share our Professional Coaching experiences with you. We enjoy practicing Agile and coaching as well as teaching and learning more from others. We are very active in organizing and speaking at Agile meetups and conferences. We incorporate many activities into our teaching because we love to learn by doing.

Over the years, people have often asked us, "When will you write a book?" Although we had lots of material and activities from our teaching and conference sessions, we weren't sure what our unique angle might be.

Then, when we were talking about our Agile Coach course at an Agile Games New England event, we started hearing something interesting. People said they had decided to skip Agile Coach training and go straight to Professional Coaching training. What makes this interesting is that Professional Coaching is its own discipline, separate from Agile. We realized we had found the angle we were looking for: a book with lots of exercises written for people in an Agile environment who want to learn more about Professional Coaching.

To get a better idea of what Professional Coaching is, let's move away from Agile and Agile Coaching altogether for a moment and consider people's personal and work lives in general. As we go about our daily lives, we make many decisions and find solutions to issues as they arise. When we run into an issue we can't solve immediately or decide to try something new, there are a number of tactics we can employ to identify next steps, such as putting aside time to focus on the matter, looking for ways to stimulate our imagination, and thinking of different perspectives to consider.

If we are still stuck and become frustrated, we may reach out to other people. Other people can provide support in a variety of ways, including the following: partnering with us on the tactics already mentioned, listening and keeping the focus on us, asking questions that lead to insights, or providing new information that is relevant to our issue.

By contrast, there are many behaviors that diminish the value we receive from other people as we search for a way forward. Sometimes, people interrupt the flow of our thinking, judge what we are saying, and provide unsolicited opinions and advice. Refraining from these diminishing behaviors is another way that people can support us.

Usually, we need to interact with more than one person to get the help we need to find solutions to our issues. Who we reach out to depends on the kind of assistance we need. Even after we get new information and perspectives from reaching out to others, we generally need to tailor a solution to our personal perception of our capabilities and situation.

What Is Professional Coaching?

Professional Coaching is an approach for helping people when they are stuck. It is composed of two parts. The first part consists of supportive behaviors such as those described earlier, practiced to a high degree of skill. The second part consists of coaching-specific skills such as asking perspective-shifting questions and setting up accountability systems.

In this book, we use the term *Professional Coaching* as defined by recognized credentialing bodies such as the International Coaching Federation (ICF) and the International Association of Coaching (IAC). One definition of coaching (from the ICF) is "Partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential."

In the Agile community, the basics of Professional Coaching were first widely publicized by Lyssa Adkins's highly influential 2010 book *Coaching Agile Teams*. Professional Coaching is also recognized as one of the core competencies of an Agile Coach by the International Consortium of Agile (ICAgile) and the Scrum Alliance's Certified Agile Coach program.

Lyssa introduced an Agile Coaching framework consisting of four distinct areas of competency: Professional Coaching, Facilitation, Teaching, and Mentoring. Lyssa's book covers each of these areas, and we highly recommend it for those who are looking for an introduction to Agile Coaching. As depicted in Figure P.1, this book focuses on Professional Coaching and touches on the other three areas as they relate to Professional Coaching.
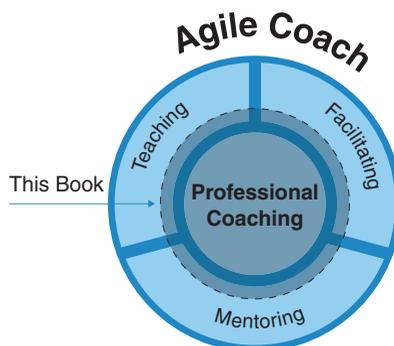
Figure P.1
The focus of this book

Achieving proficiency in Professional Coaching is a rigorous journey of learning, mentorship, and practicing in alignment with Professional Coaching behaviors. The full scope and depth of skills and behaviors of Professional Coaching are described by the ICF in their competencies and assessment markers documents and by the IAC in their *Coaching Masteries* e-book.

One way to assess your proficiency is by pursuing a coaching credential. The first of three possible ICF credentials currently requires 60 hours of live training, 100 hours of coaching in accordance with their assessment markers, 10 hours of mentor coaching, passing a knowledge assessment exam, and submitting a recording of a coaching session that exhibits the behaviors covered by the ICF assessment markers.

We believe Professional Coaching is a mindset and skill set that anyone can learn with practice. This book is a start along that journey, within an Agile context. We'll show you how to apply Professional Coaching when working with individuals, teams, and organizations. Be sure to augment what you learn here by engaging with colleagues who are further along the Professional Coaching path.

Professional Coaching draws on many bodies of knowledge, including emotional intelligence, psychology, feedback, mindfulness, and others—all are deep topics on their own. Although we will touch on these other bodies of knowledge, we will do so only to show their connection to Professional Coaching.

Who Is This Book For?

This book is for Agilists, people who model and champion the values and principles of the Agile Manifesto. Agilists support individuals, teams, and organizations as they transition from one mindset and way of working to a more Agile mindset and Agile way of working. Agilists include those in named Agile roles such as an Agile Coach or Scrum Master, but also include Agile team members and those in leadership positions who are sponsoring and supporting the change.

Most books on the topic of Professional Coaching focus on how to coach an individual seeking to improve their performance across any area of life. In contrast, this book focuses on how to coach individuals, teams, and organizations as they increase their ability to think and work in an Agile way. This book is written for Agilists who work alongside those they coach. We assume you are already familiar with Agile Coaching and are interested in diving deeper into the Professional Coaching aspect.

What Makes Professional Coaching Valuable for Agilists?

Agile involves many changes in mindset, culture, process, and ways of working. As a result, people will get stuck more frequently as they try to figure out how to incorporate Agile in the way that they work. Professional Coaching is a valuable tool for helping people get unstuck and accelerating their transition to an Agile way of thinking and working.

What Is in This Book?

We have designed this book to enable learning through doing. There are exercises associated with each chapter that you can use to practice what you learn as you go. The book starts with the basics of using Professional Coaching, adding advanced concepts and practices as it progresses. Consequently, not all of the material on any given subject will be found in one place. For instance, we introduce powerful questions in Chapter 1 and expand on the topic throughout the book.

The first three chapters serve as a foundation for the rest of the book. Subsequent chapters may be read in any order. You don't need to read the entire book to start applying what you learn. You can read the book a chapter at a time, do the exercises for that chapter, and then move on to the next chapter. Alternatively, you can read the entire book and then do the exercises at the end.

Chapter 1: Basics of Professional Coaching.
Learn about our approach of objective-based coaching and see how everything in coaching supports the "aha" moment. Identify the fundamental differences between the coaching mindset and the expert mindset. Discover the key attributes of "powerful questions" that provide deep insights leading to those aha moments. Explore Professional Coaching through a sample conversation.
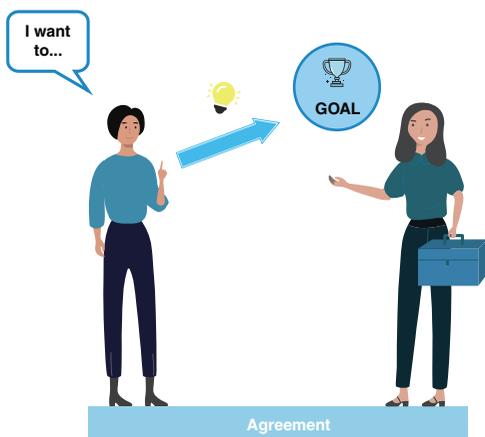
Chapter 2: Professional Coaching in Depth.
Learn more about the coaching objectives. Explore the coachee's mental landscape of issue, goal, paths, and obstacles. Discover how coaching techniques connect coaching objectives and powerful questions. Further explore how to apply Professional Coaching through a series of three coaching conversations.

Coachee   Coach
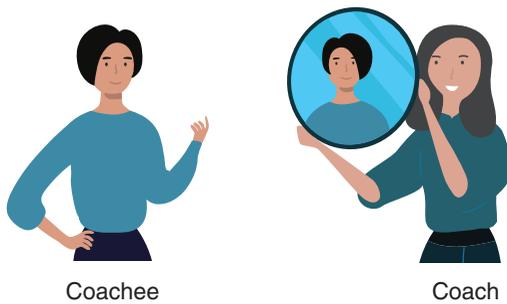
Chapter 3: Acting as a Mirror. Explore techniques to help people uncover blind spots and see themselves, others, and the circumstances of their situation more clearly. This chapter shows how everything works together and completes the foundation of Professional Coaching that the following chapters depend on.

Chapter 4: Offering Expertise. Although coaching is a major part of helping people move toward an Agile mindset and Agile way of working, your Agile knowledge and experience will also play a significant role. Learn how to offer expertise while maintaining a Professional Coaching mindset.

GOAL

Chapter 5: Coaching toward Performance. Explore techniques to help individuals, teams, and organizations connect with their unique strengths and other dimensions of who they are to grow their awareness of what helps them perform at their best.
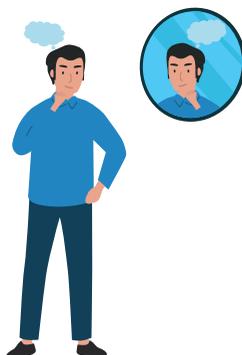
Chapter 6: Being the Best Coach You Can Be. Discover how you can increase your effectiveness as a coach by leveraging your whole self. Incorporate who you are as a person into your coaching and incorporate Professional Coaching into who you are as a person.

Chapter 7: Leveraging Group Facilitation.
Learn how to blend Professional Coaching and group facilitation to multiply the effectiveness of both disciplines and include and engage everyone. See how to shift from conducting Agile events to applying Professional Coaching to teams and organizations.

Chapter 8: The Coaching Engagement. You have your unique approach to coaching—from how you start with a new team to how you provide potentially useful expertise. The people, teams, and organizations you coach have their respective expectations of what you will do and how you will do it. Examine techniques for managing a mutually successful engagement such as coaching engagement models and coaching agreements.

Appendix A: Exercises. As you read the book, practice coaching with more than two dozen exercises that cover the material in all eight chapters.

Appendix B: References. Material from throughout the book—such as the coaching objectives, coaching principles, coaching techniques, and behaviors to do and avoid—arranged for easy reference in your day-to-day coaching. This appendix also includes a coaching "reference sheet" for use when practicing coaching, templates of documents used in coaching, and guidelines for providing feedback and expertise. Between the reference sheet and the coaching techniques, this appendix contains more than 100 examples of powerful questions.

Register your copy of *Professional Coaching for Agilists* on the InformIT site for convenient access to updates and/or corrections as they become available. To start the registration process, go to informit.com/register and log in or create an account. Enter the product ISBN (9780136741732) and click Submit. Look on the Registered Products tab for an Access Bonus Content link next to this product, and follow that link to access any available bonus materials. If you would like to be notified of exclusive offers on new editions and updates, please check the box to receive email from us.

Acknowledgments

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About the Authors

Damon Poole and Gillian Lee co-created an ICP-ACC Agile Coach course, and both have earned the ICAgile Certified Professional in Agile Coaching. They also co-created a Professional Coaching program for Agilists.

They frequently co-present at conferences and have created a series of popular Agile games, such as User Story Games, Agile Coaching Games, Heroes of Agility, and a small collection of online games. This element of learning through play is consistent in all of their training exercises, including the ones in this book.

Damon Poole has coached and trained thousands of people at companies such as EMC, Capital One, OANDA, Ford, and Fidelity. He speaks frequently at the Agile Alliance conference, Agile New England (which he led for two years), Kentucky Fried Agile, Atlassian Summit, Agile and Beyond, Agile Toronto, and others. As a coach of coaches at Eliassen, Damon led the Agile Delivery team, which grew to hundreds of Scrum Masters and Agile Coaches in the field.

He created Eliassen's Agile Transformation approach and the training content across all aspects of Agile, and he led the effort to provide opportunities for the coaches to advance in their coaching journey. This background gave Damon the opportunity to learn from hundreds of Agile Coaches in an enormous variety of client environments and from the wider international Agile community.

Damon is an International Coaching Federation Associate Certified Coach and an International Coach Academy Certified Professional Coach.

Gillian Lee is a Delivery Coach who works with software development teams and leaders in growth-stage organizations to maximize their delivery potential, most recently at Nulogy, Rangle.io, and OANDA. She also helps others develop their coaching and facilitation competencies through teaching workshops and mentoring. Gillian regularly speaks at local and international Agile meetups and conferences, such as the Agile Alliance conference, Agile and Beyond, Regional Scrum Gathering Canada, Toronto Agile Conference, and the AgileTO meetup, which she co-founded. Gillian is also a regular contributor to Agile Coach Camp Canada and Play4Agile Open Spaces.

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Offering Expertise

When you first start working with people, they may recognize your value only as an Agile expert and problem solver. They may not have had experience working with people who have Professional Coaching skills. In any given interaction, it is possible that the coachee will be able to move forward on their own without your Agile expertise or problem-solving skills. Considering that you won't know in advance if that is the case, we recommend you start with the assumption that the coachee can move forward on their own. When you lean toward Professional Coaching over providing Agile expertise or problem-solving, you maximize the opportunity for your coachees to learn and grow in their ability to think and solve problems in an Agile way.

Our coaching principle related to expertise is the following:

> *Professional Coaching provides more opportunity for coachees to learn and grow than offering expertise does.*

In this chapter, we'll look at how to hold back from offering expertise, when to switch from Professional Coaching to offering expertise, how to provide just enough expertise while staying in a coaching mindset, and how to switch back to Professional Coaching as soon as possible.

We define expertise as any knowledge, skill, experience, or problem-solving ability related to a specific field. There are many ways to share expertise. We include sharing observations, sharing feedback, and comparing expectations as forms of sharing expertise.

Resisting the Urge to Provide Unsolicited Expertise

It may seem that when someone approaches you in your capacity as an Agile Coach, Scrum Master, or Agile expert in some other role, there is an implicit request for your expertise. However, people often share expertise before it is explicitly asked for. The first and hardest part of staying in the coaching mode is resisting your own urge to share your expertise when you see an opportunity. People often say to us, "I just want to help people." Providing expertise that can lead to a solution is one way to help. Professional Coaching is another way.

Before you provide any expertise, make sure that it is the right time to do so. It may be that the initial description of an issue is not the real issue. Coaching can help both the coach and the coachee make sure they are working on the real issue before going too deep into whatever comes up at first.

Also, if the coachee can arrive at a solution that works well for them without any expertise from you, then you have provided them with the opportunity to learn and grow in their ability to solve problems in an Agile way.

So the first step to staying in the coaching mode is to set an intention to only offer your expertise when it is explicitly asked for. See how long you can withhold offering expertise. Learning to resist the temptation to offer expertise before the coachee asks for it can take months of practice.

Handling Explicit Requests for Expertise

You don't always have a chance to withhold your expertise, because the coachee may start the conversation with some variation of "I need your expert opinion." In our experience, many people have not yet experienced Professional Coaching. When people are not familiar with Professional Coaching, they will most likely be approaching us purely for our Agile expertise. They may feel a need to validate a decision they have already made or to get "the answer" to their problem.

Here are four methods for handling explicit requests for expertise: reducing the number of requests by proactively educating people on the value of coaching, applying the "redirecting" coaching technique, applying the "highlighting" coaching technique, and sharing expertise using a coaching mindset.

Proactively Raising Awareness of the Value of Coaching

People often have unrealistic expectations of Agile experts. We find that people often approach coaches with situations such as: "We keep pushing work to the next Sprint and the kind of work we do can't be broken down further. What's the right thing to do?" The only information the coachee has provided is that work is getting pushed, and they believe that the work can't be broken down further. It would take a magician to determine what would work in this situation given this limited information. And even if the coach goes into expert/problem-solving mode, whatever they come up with might work for them personally given their skills and experience, but it may not work for the coachee and others involved, given their skills and experience.

By helping coachees understand the value of coaching prior to engaging with them, you can help them understand that you are not a magician who can conjure the solution to every problem that involves Agile. You can also increase the chances that they approach you for your coaching skill rather than just your expertise.

Here are some ways to help people understand the value of coaching:

- Send people a one-page description of what coaching is, how it works, and its potential value (example provided in Appendix B).

- At the beginning of any interaction with a new organization, team, or individual, introduce coaching agreements, as covered in Chapter 8.

- Offer a demonstration of coaching.

- Model coaching through the day-to-day use of your coaching skills.

Coaching Technique: Redirecting

When you receive a direct request to provide expertise or do some work the requester could do, such as "What do you think I should do?" or "Can you run the retrospective for my team?" a skillful redirect can move the conversation to a coaching conversation. Redirecting has three parts: (1) directly acknowledging the request; (2) temporarily redirecting to coaching to explore what's behind the request; and (3) determining what the coachee would like to do next, which may include the original request.

The first part is to acknowledge the request. When someone makes a request, they usually do it because they think that is the best course of action. If you ignore the request or deny the request, they may become impatient with you or feel that you are being dismissive. When you acknowledge a request, you reassure the coachee you heard their request and that you will consider it as a possible option.

The acknowledgment needs to be paired up with the temporary redirect to coaching, or else you may not end up doing any coaching. As an example: "I would be happy to share my thoughts. Before I do that, I'm wondering what you are already considering." Here's another example: "I'd be happy to run your retrospective. What is it you think I will bring to the retrospective that will help?" This response will give both of you more insight into where the coachee may be stuck in solving the issue on their own.

The last part of redirecting is giving the coachee freedom to return to their original request if they want to. This is done by including their original request in any discussion of possible options for moving forward. Including their original request demonstrates your belief in and respect for people's freedom to make their own choices. Ultimately, the coachee may still want you to do what they originally requested, but you will have now explored the possibility of the coachee finding solutions on their own.

Example dialog:

   Manager: "Could you teach my team how to use planning poker?"

There may be a good reason for the team to learn and use planning poker. Alternatively, coaching may reveal that the real issue is that the manager thinks the estimates the team is coming up with are too large. In that case, teaching the team planning poker, when they may already know it, is likely to leave the original issue unresolved at best and aggravate the team at worst.

   Coach: "I'd be happy to teach them planning poker. What makes this something that needs to be addressed right now?"

The coach has acknowledged the request and pivoted to a coaching conversation. It may be that the conversation ends right back where it started, but at least the coach has created an opportunity to see if the coachee can find a solution on their own.

   Manager: "Well, I don't think they are doing planning poker right because their estimates always seem to come out too high and then they don't get the work done in time."

From this answer, it seems that the manager may not understand the purpose of planning poker or may not understand the use of story points (or both). The coach may need to detour into teaching or mentoring at some point. But it looks like the coachee may have surfaced the real issue.

Let's say that during the course of the conversation, the coachee has come up with a number of paths forward. Let's rejoin the conversation a bit later on and see how the last step of circling back and leaving the choice with the coachee looks.

   Coach: "You mentioned having me teach the team planning poker, having the Product Owner run a user story workshop, and resetting stakeholder expectations on delivery dates. What are you leaning toward?"

By including the original request, the coach is leaving the choice with the coachee and letting them know they can trust the coach and that the coach is not trying to trick them or get out of providing help.

Coaching Technique: Highlighting

While requesting your opinion, coachees often express potential solutions in the request without recognizing them as such potential solutions. They may have a blind spot or perceive a constraint. This is a good opportunity to act as a mirror. If you are truly listening rather than trying to solve the coachee's problem, you can more easily notice and highlight these potential solutions for the coachee to consider.

We call this *highlighting*. First, acknowledge the coachee's request, then highlight the potential solutions they mentioned. Finally, switch to asking a coaching question.

For instance, if they ask, "Do you think I should do A or B?" you can say, "I'm happy to share my thoughts, but I'd like to explore a little more first. It sounds like you are considering A and B. What's keeping you from doing one of these?"

Here are some key phrases that indicate that the coachee may be dismissing potential solutions or perceiving constraints as immovable.

- "What would you do?"

- "I could do A or B, but what's the right thing to do?"

- "We can't do X because we would need to do Y first."

Example dialog:

Product Owner: "We keep pushing stories into the next Sprint. I guess we could take on fewer stories, put in more hours, or split the stories, but what's the right way to fix this?"

Coach: "I can share my thoughts, but I'm not in your shoes. You mentioned taking on fewer stories, or putting in more hours and splitting stories. I'm curious, what's keeping you from picking one of these options?"

A common situation is that the coachee knows what needs to change but thinks of it as an immovable constraint. For example:

Senior Leader: "I'd like to use Scrum here, but we can't because we don't have cross-functional teams. Is there another Agile framework that might work?"

Coach: "We can certainly discuss other frameworks. You mentioned that you'd like to use Scrum, and that it would require cross-functional teams to do so. I'm wondering, what's keeping you from moving to cross-functional teams?"

As with redirecting, make sure to circle back and give them the option of getting your opinion on the subject.

Sharing Expertise with a Professional Coaching Mindset

If you are working with a team that may benefit from a practice such as the Kanban Method, but they have never heard of it, no amount of Professional Coaching is going to result in someone spontaneously saying, "Great question! Let's visualize, limit our work in progress, make policies explicit,

and implement feedback loops. Let's also collect data and graph our lead times, throughput, and cumulative flow to better understand our delivery capability." In cases like these, you should absolutely offer your knowledge. Try "Here is something that you may find useful in this situation" rather than "This is what you need to do."

When providing Agile expertise, including sharing observations and setting expectations, it is possible to do so with a Professional Coaching mindset. Table 4.1 outlines an approach that preserves the coachee's trust in you, preserves their ability to make their own choices, and supports their learning and growth.

Table 4.1   Sharing Expertise with a Professional Coaching Mindset

Step	Description	Example
Sense the Need	Notice that the coachee may benefit from information they don't currently have.	A coach is working with a Product Owner who is having trouble splitting a user story.
Offer Your Expertise	Ask for permission to share your expertise, to confirm that receiving your expertise is the coachee's choice.	**Coach:** "I have an idea here that may help. Would you like to hear it?" **Coachee:** "Yes, I would."
Articulate Your Expertise	Unless it is already known, explain your background in the area being discussed. This gives the coachee context to help them decide how or if they will incorporate what you share with them.	**Coach:** "I've helped a number of Product Owners from a variety of industries to split user stories. I've also created some games to illustrate writing and splitting user stories."
Ask Context Questions	You may need to ask questions to better choose which experiences or examples will be most relevant to a situation.	**Coach:** "What area of the business is the user story for?" **Coachee:** "Credit card transaction processing."
Provide the Relevant Examples or Experiences	Try to provide multiple experiences or options. Giving more choices will reinforce that the coachee decides.	Based on the answer to the context question, the coach provided examples of how other companies had split payment processing stories by customer size and credit card machine capabilities.
Return to the Coaching Mode	Avoid questions that limit the coachee's choice, such as "What do you think of my idea?" If you act as if the coachee had the information you just provided all along, you will likely feel less attached to it.	**Coach:** "What are you leaning toward doing?"

Maintain Neutrality to Preserve the Coachee's Choice

Whenever you share expertise, remain neutral about the information you share. That is, offer it as something that worked for the people involved in their particular circumstances. By staying neutral, you enable the coachee to make a choice without being influenced by your personal opinion.

Be careful not to show any preference for the options you share or the choice the coachee makes. Your preference can show in many ways: your tone of voice, your choice of words, your facial expression and body language. Don't get excited when they pick what you feel is the "best" or "correct" option. Don't show disappointment when they go in a different direction from what you had hoped. Remember, it is their choice, and they are the ones who will carry it out and live with the outcome. The more you influence someone's choice, the more you own it and take on responsibility for the outcome.

Figure 4.1
Offering expertise like pieces of a puzzle

As shown in Figure 4.1, think of sharing expertise as offering puzzle pieces that the coachee may be looking for. Imagine holding them out, saying, "I found these puzzle pieces." If the coachee takes a puzzle piece from you, act as though they always had that piece. You may ask, "What are you leaning toward doing next?" Perhaps they move immediately to next steps or perhaps they still need to consider how best to incorporate that piece based on their unique circumstances.

When the coachee doesn't take what you offer, accept this and find a way to return to exploring. For instance: "Now that we've been discussing this for a bit, what do you suppose remains to be uncovered?"

Wait to the Last Responsible Moment

It can be tempting to offer expertise as soon as you see the opportunity. Alternatively, if you wait too long, the coachee may become frustrated. Our recommendation is to stay in a pure coaching mode for as long as you can, but to monitor the coachee for signs of frustration. If you are coaching and they are making good progress, there's no need to switch over to providing expertise.

Sharing the "Minimum Viable" Amount of Expertise

Many of us have had the experience of having something that we already know being explained to us in excruciating detail. When providing expertise, consider the saying "Less is more."

We have found the following levels of choice useful for determining the minimum viable expertise to share. We have ordered the levels from providing the most choice to providing the least choice.

Share missing information. Sometimes the coachee has everything they need to move forward, except for one small piece of information. Because you already have that information, you may see a whole plan for moving forward in your head. By providing just the missing piece of information instead of the whole plan, you give the coachee the opportunity to do the rest of the work on their own.

Share a resource. When there are many possibilities for action, providing just a couple requires selection on your part, which then limits the coachee's choice. If you provide a resource that offers a wealth of information in the area of the coachee's interest, that gives the coachee more choice. It does require more effort on the coachee's part to get to a plan of action, but it also gives them a reference to consult when they have a similar situation in the future—and it keeps their choices open.

Share relevant examples. When you don't know of a relevant resource, or there is a time constraint, provide examples and anecdotes from your own experience. This usually affords the least choice for the coachee. However, by providing multiple relevant and viable examples and following the guidelines on sharing expertise, you can still maximize the coachee's ability to choose.

Here is an example interaction that shows the application of these three levels of choice:

Scrum Master: "Our retrospectives are getting boring and useless. 'What went well, what didn't go well, and what ideas do you have?' over and over again is mind-numbing. What should I do?"

Coach: [*Shares missing information.*] "The Scrum Guide only requires a retrospective, not a specific format."

Coachee: "Oh! I didn't know that. That's awesome! In the future, I'll take advantage of that flexibility, but I don't know any other formats. What should I do?"

Coach: [*Shares a resource.*] "There's a website called retromat.org that will give you a random format by choosing from a wide variety of options for the five stages of a retrospective."

Coachee: "Oh! Terrific! But I need to run this tomorrow and I don't have time to look into that. What should I do?

Coach: [*Shares examples/experience.*] "I find that when folks are first trying a different format, they have good results running 'Best Team' or 'Timeline.' I'll send some information on those."

Coachee: "Perfect. Thanks so much for your help."

Feedback Is a Form of Expertise

As an Agile expert, you will notice things that others don't. When you share your feedback, you are sharing expertise. Everything that applies to sharing other kinds of expertise also applies to feedback.

Observations Are Feedback

The simplest form of feedback is an observation: "You have tomato sauce on your nose." It is the same as holding up a mirror to help the other person see something that they may be missing. It is just an observation; there is no reference to expectation. You don't need to do anything beyond the observation; the person will thank you and take care of the issue on their own.

Saying "I noticed the standup went to 30 minutes today" is feedback in the form of an observation. If there is already a shared expectation around the length of the standup, a simple observation should suffice. On the other hand, perhaps members of the team came from another organization where the expectation was 30 minutes and they feel like everything is fine. In that case, there are mismatched expectations and a simple observation will not be enough feedback.

Comparing Expectations Is Feedback

Another way to provide feedback is via expectations. For example, you might be attending a standup for a team that is new to Agile. You notice lots of discussion on topics outside of the work that the team is focused on for the current iteration. With your teaching hat on you might say, "I notice there has been some discussion on subjects outside of the work for this iteration. There's no issue with having those discussions. However, the expectation during the standup meeting is that we will limit our discussion to what we are currently working on for this iteration and discuss other topics later, perhaps right after the standup meeting."

With this statement, you have provided feedback on the current situation consisting of an observation and a reminder of what is expected. Hopefully, that is all that is needed for the team to change their behavior. If that doesn't work, you may need to provide more expertise to help the team produce the expected result.

Sharing the Minimum Viable Amount of Feedback

Just as with other forms of expertise, you can share the minimum amount of feedback. For instance, if you sense that a person is unaware of something that would be useful for them to know, make a single small observation and then stop. If you sense there may be a difference of expectations, just state your expectations and then stop. When you provide the minimum viable amount of feedback, it gives the other person the opportunity to make their own choice about what to do about the observation or new understanding of expectations, possibly removing the need for you to provide additional expertise. And if the expertise you have shared is not enough, you can always offer more.

Giving Praise and Criticism Is Like Playing a Game of Hot and Cold

Praise and criticism are often intertwined with observations and expectations. Praise and criticism are forms of judgment. Praise may make the coachee feel good about their performance. Similarly, criticism may make them feel bad. Neither provides much information about exactly what met or did not meet expectations.

Consider the children's game "Hot and Cold." In this game, an object is hidden and a seeker has to find it. The seeker is given clues about how close they are to the hidden object in terms of temperature. They are told they are getting hotter if they are closer and colder if they are farther away. The seeker depends on these clues to find the object.

Providing praise or criticism of a coachee's performance is similar to a game of Hot and Cold. Without receiving specifics through observations and expectations, the coachee is less likely to learn how to do Agile well. If the person providing the feedback goes away, the coachee's ability to continue on the path to Agility may also go away.

In our experience, the best results come from using only observations and expectations to provide feedback and avoiding praise and criticism. When people realize through your observations that they are meeting their own expectations, they will naturally feel good about their efforts.

Examples

The following examples illustrate the differences between observation, expectation, praise, and criticism.

Scenario: A Scrum Master conducts a retrospective. In the team agreement, it says the team picks the retrospective format and the duration is an hour. The Scrum Master brings two new formats for the team to choose from. During the retrospective, one of the topics that surfaces is to make a decision between two potential implementation technologies. After a facilitated discussion, the team makes their decision and then creates a plan for moving forward. At one point, Bob, a technical writer, tries to get the Scrum Master's attention but fails. The retrospective runs one hour and fifteen minutes and some participants leave after an hour.

Praise: "Awesome retro! Way to go!"

Criticism: "The retro could have been better."

Observation: "I see the retro ran over by fifteen minutes and people had to leave before the end."

Expectation: "The team agreement says that the retrospective should be an hour, but that was an hour and fifteen minutes."

Expectation [From Bob]: "I expected everyone to have a chance to speak."

Advice: "Next time, consider checking in on the time throughout the retro and ask people what they want to do if it seems the conversation will run over time."

Return to Professional Coaching as Soon as Possible

Part of sharing the minimum viable amount of expertise is returning to Professional Coaching as soon as you can. Think of Professional Coaching as your default mode, only venturing away from it when absolutely necessary and then for as short a time as possible. Set an intent to start with Professional Coaching, switch to something else when needed, then switch back to Professional Coaching. This approach is illustrated in Figure 4.2.
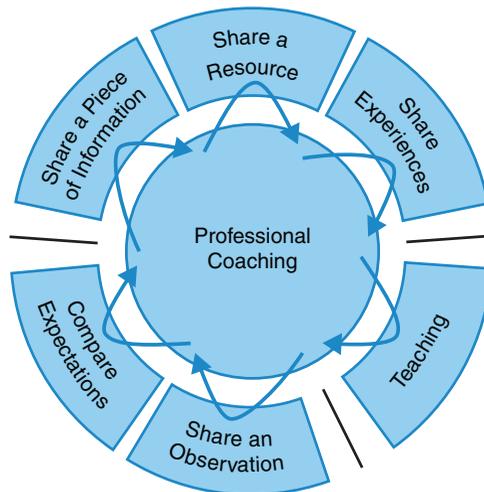
Figure 4.2
Staying in Professional Coaching mode as much as possible

We All Have Blind Spots

As an Agilist, you have a "superpower." You have an aptitude for Agile, have spent time taking Agile classes, and have more experience with Agile than many other people. When you observe a standup or retrospective, you will see things that others don't see.

Let's say you see team members showing up late to the standup and also grumbling about the start time, even though that's the start time in their team agreement. You see some discussion on the late start that isn't leading to a resolution. Based on your experience and where this team is at in their Agile journey, you feel they need to revisit their team working agreement. Although they often refer to their team agreement, it has been a while since they have updated it. During that time, there have been some changes to both the team and their environment.

If, based on your observations and experience, you suggest to them that they revisit their team agreement, they may go along with you. And perhaps it will help. But the question here is this: Why didn't they think of this on their own? Is it because they forgot about the team agreement? Is it because they don't actually value it? Is it because they haven't built the habit of regularly revisiting their team agreement? Or is it something else?

Instead of sharing your conclusion based on your observations and experience, share what you saw that started your thought process and see where it goes from there. You might say something like this: "May I offer an observation? Yes? OK, I notice quite a bit of tension around the start time of the standup. Considering that the start time is in the team agreement, I wonder what might be going on?"

There is no point in making observations, providing feedback, or sharing expertise regarding things that are in the receiver's blind spots. First, you need to find a way to raise their awareness of the blind spot. By focusing on what they can already see, you show that you are listening to them and focusing on them, and you build trust and rapport.

Here's another example, but this time the blind spot is in a coach. I (Damon) was overseeing a coaching engagement where the embedded coach was at risk of being removed from the engagement. I went to talk to the coach and asked what was going on. The coach said, "They just don't see it!" I asked, "What don't they see?" The coach said, "They are losing so much money and opportunity by not doing DevOps." I asked, "What is it that they do see?" The coach said, "Oh, they have a whole list of things they want help with."

About a month later in a follow-up, the coach said, "They are starting to see how fragile their deployment process is and are starting to ask how continuous integration and continuous deployment might help." As the team learned more and took care of what they saw quite clearly, other impediments and potential improvements became visible to them.

When you are observing a team or an organization, consider the model of blind spots, as shown in Figure 4.3. Keep in mind that what you see and what they see are different. Look for impediments and opportunities for improvement that both you and your coachees see, and then focus on these first. As you build trust and increase the coachees' Agile knowledge and experience, the scope of what you see in common will expand, and their trust in your coaching and Agile expertise will expand as well.
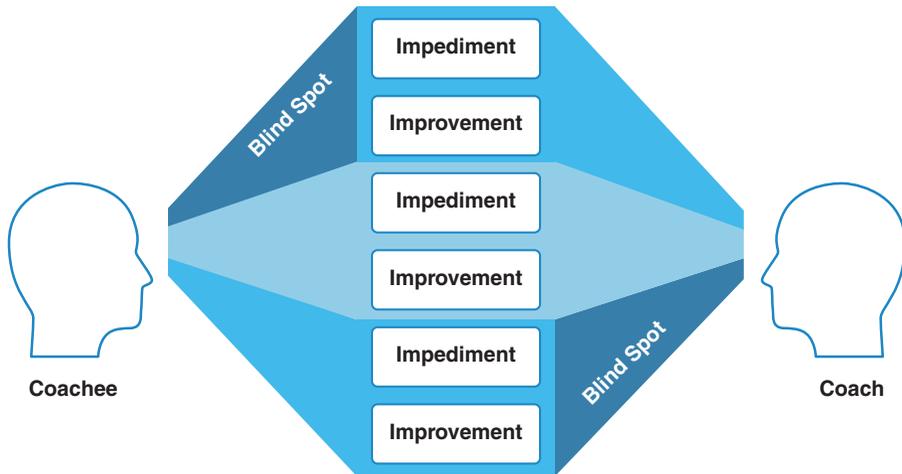
Figure 4.3
Blind spots

Applying a Coaching Mindset to Teaching

In our experience, teams that increase their Agility the fastest also have the most involvement in choosing how they work. The difficulty in supporting this approach is finding ways to impart knowledge while allowing the team to make their own choices. The Agile Manifesto does not dictate a specific way to align with its values and principles. One way to teach a team and yet allow them to choose how they will work is to separate the teaching from the choice of what to do.

To separate the two, teach the most common Agile practices with the explanation that "these are things you *can* do," and then separately facilitate a session to help the team decide what they *will* do. For example, we were working with an organization that wanted to implement Scrum, with the exception of one team that said that while they did want to be more Agile, they didn't think Scrum out of the box would work for them. The team was doing infrastructure work, such as rolling out new firewall rules, provisioning servers, and the like. There was no one performing the equivalent of the Product Owner role, and no one in the organization was looking to fill that role. Many organizations use Kanban for infrastructure teams.

Rather than suggest a particular framework or mash-up of techniques, we ran a workshop that taught the team the basics of Agile, Scrum, and Kanban and then enabled them to pick the practices that appealed to them. They ended up choosing the following practices:

- T-shirt sizing
- Visualizing their work with a simple card wall
- Having the entire team act as the Product Owner
- Using a backlog

- Describing the work just as they had before

- Choosing work-in-progress limits

- Having a daily huddle to check progress

- Triaging new work as it comes in

- Deciding who was going to work on what as people completed their previous work

- Having a retrospective every other week

We made it clear as part of the workshop that they should consider these practices as their starting point and refine their choices as they go, leveraging the retrospective to do so. Is that Scrum? Kanban? Scrumban? They didn't care about giving it a name, and neither did we. They were very excited about what they had come up with as a team and moved forward with enthusiasm. Over the next few weeks, they significantly reduced their turnaround time and were happy with their custom-crafted "flavor" of Agile.

By using this approach, you give choice to the team and coach toward Agility, rather than choosing a specific Agile framework for the team and then teaching them that framework.

Creating a Self-Serve Knowledge-Sharing Environment

As an Agilist, you regularly observe opportunities to improve Agility. These observations can tempt you to make specific recommendations and to advocate for particular courses of action. Instead, consider leveraging your expertise and desire to help in a way that affords people more choice.

Let your observations guide you in deciding what to offer. For instance, you might observe an opportunity for people to benefit from technical practices or Kanban practices. You can then offer lunch-and-learns on these topics. Whoever shows up are potential allies. Attendance also helps gauge interest in topics to inform future offerings.

Using Agile and Modeling Agile

Modeling Agile behavior provides your Agile expertise in a way that others can absorb by their own choice. For instance, consider putting your coaching work in a backlog or a Kanban board. A physical visualization in a public area will provide a lot of visibility, but an electronic one also has its advantages. Using these tools gives you an opportunity to discuss and prioritize your work with others.

Publishing Your Capabilities

Imagine going to a restaurant. Once you are seated, the host doesn't provide you with a menu. There are no menus on the table. There are no menus on the wall. There are no menus anywhere. When the server comes by, you ask for a menu, and they say, "We don't have menus here.

We serve food. What would you like?" Then imagine you ask for a cheeseburger and they say, "We don't serve that here." That would be a frustrating experience.

Restaurants provide menus because they have certain capabilities and are prepared to offer certain meals. Similarly, as coaches, we have certain capabilities that our coachees may or may not be aware of. It may be their very first time using Agile, or they may have had a different coach in the past whose experiences and approach were different from yours.

There are many different views of what "Agile" really is. When you first meet a client or a new team, it is likely that the true value you can provide is not fully understood and that people will have certain preconceived notions of how you will provide value to the organization, teams, and individuals. Many people who could benefit from your services won't even know what to ask for.

Catalog of Services

Just as a menu explains what food a restaurant offers, a catalog of services explains what services you provide. When creating a catalog of services, make sure you provide enough detail to make your offerings interesting without overwhelming people. You want people to be able to quickly scan your catalog to see if there is anything they would like to learn more about. You can provide more detail in person.

Here are some possible offerings:

- Scrum Overview

- Scrum Training

- Kanban Overview

- Scaled Agile Framework Overview

- User Story Splitting Techniques

- Scrum Master Mentorship Program

- Product Owner Mentorship Program

- Three Fun Retrospective Formats to Try

- Introduction to Virtual Collaboration Tools

One of the benefits of having a catalog of services is that people are "opting in" when they ask for one of your services, rather than feeling they have a deficiency you are asking them to address. We've included examples of catalog entries in Appendix B for reference.

As with a catalog of services, people value learning how to apply Agile from others who have had experience in their role, especially if you were practicing Agile in that role. To raise awareness of your past roles, create and publish an "Agile Expertise Resume" that simply lists the roles you have had in the past and a little bit about your experience in those roles.

Guidelines for Sharing Feedback and Expertise

Before offering feedback or expertise, consider what you can do to maximize the likelihood that it will be graciously accepted. Here are some guidelines we keep in mind:

- **Timely.** Feedback is most useful when it is delivered soon after whatever prompted the need for feedback.

- **Good intent.** When someone's actions have negatively impacted you, you may feel upset about or critical of that person. Be wary of how your feelings may color your feedback with criticism or judgment. Check your intentions to make sure what you want to share is sincere and intended for the recipient's benefit.

- **With permission.** Some people may welcome your feedback and expertise. Others may respond poorly to it. It is a good idea to get permission and to clarify that accepting the feedback and expertise is optional, particularly when you don't have a history of giving feedback to that person. Most people, when asked "Would you like my feedback?" or "Would you like my advice?" will say yes. This is a good time to use your emotional intelligence to gauge their level of interest. Was the yes genuine or said to be polite? Was permission given freely or with reluctance? When asking for permission, check your intention. If you intend to provide your feedback or advice no matter what the response is, then you haven't asked for permission. If your intent is truly to get permission, then you will stop as soon as you see any indication of a lack of interest.

- **Credible.** People prefer to get feedback and expertise from someone whom they perceive as having greater experience in an area.

- **Safe.** Feelings about the optimal conditions for receiving feedback will vary. Some people are open to all feedback at any time, even in front of others. Others prefer to receive feedback in a private setting, such as a one-on-one conversation. Avoid giving "drive-by" feedback with no chance for the recipient to ask questions or respond.

Additional Considerations for Sharing Feedback and Expertise

Here are some additional thoughts on sharing feedback and expertise with a Professional Coaching mindset.

Embrace Not Knowing

An important part of Professional Coaching is being comfortable with not knowing. Not knowing may not match our image as an Agile expert. If we are the expert, how can we be comfortable with not knowing? It's simple. Although we may be an expert in Scrum or Kanban or test-driven development, it is the coachee who is the expert in the area where Agile is being applied. Our role is to help the coachee become an expert at applying Agile within their context. We want our coachees

to see us as a partner first and Agile expert second. For this to happen, we need to act as a partner first and Agile expert second.

Acknowledge the Coachee's Contributions

It's not unusual for others to give you credit when you provide the missing puzzle piece. When you offer expertise that helps another person solve their problem, acknowledge their part in coming up with that solution. They figured out how to adapt the knowledge you provided to their specific circumstances. Remind the coachee of everything they did to come up with the solution and that you are their partner.

Encourage the Coachee's Learning and Growth

After providing feedback or expertise, look for follow-up opportunities that will help the coachee to learn and grow. If the coachee asked for help splitting user stories, what user story splitting resources might you share? If the coachee requested advice on applying Kanban practices, what training might you or others offer? Most likely, many people are seeking your Agile expertise, so the more that your coachees invest in their own learning and growth, the more you can focus on providing the highest value to everyone you serve.

What if Their Approach Is Not as Good as My Approach?

The goal of coaching is to help people find their own solutions and to encourage their learning and growth so that they can practice Agile without having an Agile expert involved. When people make their own choices, they feel greater responsibility for the outcomes and will learn and grow more quickly. The goal is not to arrive at the solution that you feel is best, but rather a solution that moves the coachee toward mastery.

What if They Make a "Bad" Decision?

In a workshop, in reference to letting people and teams make their own decisions, a participant once asked, "What if we let them make their own decision and it doesn't turn out well? I mean, if it is the kind of thing where they might skin their knees, that seems fine, but what if they might end up in the Emergency Room?"

We love questions that contain their own answer. And in fact, we thought it was so good we decided to use it as an example of when to move from Professional Coaching to something else. If someone comes up with an approach that is not what you would do, but it is what they came up with and the risk is analogous to getting a scrape when falling off a bicycle, there's likely more growth opportunity than actual danger. Conversely, if they come up with an approach that you know from experience is likely to end badly, it is worth mentioning your past experience in a similar situation. People are responsible for their own welfare. If they still want to continue, there's really not much anyone can do to stop them.

Receiving Feedback as a Coach

One way to improve people's receptiveness to feedback is to model that receptiveness. Modeling this behavior can be difficult when feedback is poorly delivered. Although some feedback may be poorly communicated and feel wrong, hurtful, or ill-intentioned, there may still be valuable information in it that you can use.

The first step to getting value from feedback is receiving it. You don't have to agree with feedback to acknowledge it. For instance, rather than saying "That doesn't make any sense to me," you could try saying something like "I hear what you are saying" and consider what truth there may be to it. If you feel your emotions becoming unmanageable, you could say something like "That's a lot for me to absorb. Let me think about what you said and follow up with you later." You don't have to respond right away.

When feedback is poorly delivered, see if you can apply the guidance in this chapter to compensate. Think about what's missing in the delivery and see if you can supply it. For instance, say someone starts to deliver feedback in front of others that you'd rather receive in private. They aren't asking for permission, and they aren't delivering it in a safe environment. Consider interrupting them with "If you don't mind, I'd be happy to hear your thoughts, but let's do it after this." Or perhaps someone criticizes you, but they don't provide any specific information. You can acknowledge that they aren't satisfied and ask for some specifics.

Chapter Summary

This chapter has been all about sharing expertise with a coaching mindset. By leaning into coaching, you can maximize coachees' ability to learn and grow in how they apply Agile in their work. This includes the following:

- Resisting the urge to provide unsolicited expertise
- Proactively communicating and demonstrating the value of coaching
- Using the coaching techniques *redirecting* and *highlighting*
- Sharing expertise using a coaching mindset
- Sharing the minimum viable amount of expertise
- Sharing expertise at the last responsible moment
- Avoiding praise and criticism
- Making your expert knowledge and expert services self-serve through approaches such as a catalog of services

A summary of the guidelines for sharing feedback and expertise described in this chapter is available in Appendix B. Appendix B also contains a summary of the guidelines for how to maximize your time spent in a purely coaching mode.

Self-Assessment

For each of these questions, also consider any potential next steps.

- How often do you ask for permission prior to sharing feedback or expertise?

- How long can you interact with another person without offering opinions or expertise? Are you able to do this for 30 minutes?

- When you share expertise, how consistently are you able to do this without advocating a specific course of action?

- When a coachee doesn't use the information that you provided, how well are you able to accept that choice?

- To what degree are you able to provide feedback without criticism or judgment?

Suggested Next Steps

- Look for opportunities to use the redirecting and highlighting coaching techniques.

- Look for opportunities to provide expertise with a coaching mindset.

- Do the exercises for Chapter 4 in Appendix A, which include "Create a Catalog of Services."

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