Designing Agile Training & Coaching for Maximum Impact & Results

November 2020

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Shifting the Training Paradigm: From Activity-Based to Results-Based

The challenges of delivering effective training and development are similar in almost every organization. This is especially true when you are introducing new approaches and frameworks such as Agile and Scrum. Sometimes organizations become frustrated with the results of training classes. They are unhappy that attendees seem to have difficulty applying the fundamentals to their real-world situations, or that different students come away with varying arguments and interpretations of what was actually taught.

Agile trainers and coaches can also become frustrated when companies expect them to provide a minimum level of training, and they are often told:

Stay in your lane! Just shut up and train!

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"All I want is the cheapest slide reader on the market so I can tell my stakeholders we are all Agile-trained by a human being."

"All I want is to buy the cheapest Agile certificate to check the box."

Often this frustration is the result of setting training up as an activity-based process rather than one that is results-based. "Getting our people trained" or even "getting our people certified" falls well short of true results-based training. It fails to put the training in the context of specific business needs and fails to identify processes to assess effectiveness.

Let's look at a typical activity-based training experience and contrast that with a more effective results-based one.

Case 1

Darrell, the Director of Software Development, has been tasked with transitioning his organization to Agile. The executives have identified 6 expected results from becoming an Agile development organization:

1. Increase incremental delivery of value
2. Increase throughput of features
3. Decrease cycle time
4. Increase quality
5. Improve regulatory compliance
6. Improve Business-I.T. collaboration

Darrell contacts our trainer, Tre. Darrell essentially tells Tre "Stay in your lane. Shut up and train."Darrell just wants to get all his people trained on Agile as quickly and cheaply as possible. And once they all get certified, they will have all the tools they need to quickly translate their knowledge into a practical implementation of Agile and Scrum, right?

Tre sends Darrell a list of prerequisites that all students should complete in order to maximize the learning experience. Darrell forwards the list, but makes no particular effort to ensure that his team actually completes them.

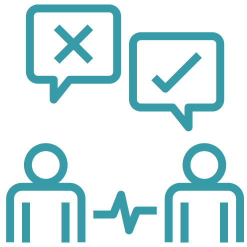
Darrell’s team consists of the following:

MANNY: is the manager of students and believes that *"training is a waste of time."*Manny would rather that the students work on upcoming deadlines instead.

Students:

WALLY: was "voluntold" by his boss, Manny. He would rather be doing "real work" instead of being stuck in some theoretical, B.S. training. He hates every single minute of being in class and lets everyone know exactly how he feels.

DEBBIE: is the debater on the team. Her sole mission in training (and in life) is to prove to everyone that she is right and everyone else is wrong.



ARI: considers all training to be a form of paid R&R. He streams the PGA Masters Tournament during training because..."*Come on - it's TigerWoods!*"

BESSY: has no basic knowledge related to the training. She also chooses not to do any of the training pre-work. As a result, she is unfamiliar with some of the terms that other students learned by completing their pre-work. So, she starts getting frustrated and either tunes out for portions of the training or frustrates the whole class by asking questions which would have been answered if she had done the pre-work.

MEL: considers training to be an opportunity to check two boxes - get a certificate of attendance and multi-task and do "real work." He is on his laptop and cell phone the whole time and actually takes phone calls while still in training.

CALLIE: loves adding training and certification to her resume because she is actively looking for a new job. Her primary goal in the training is not to learn how to apply what she learns to add value to the organization, it is to get a new job outside the company or to use the certification to demand a promotion and pay-hike in the current company.

LENNY: is probably one of the few curious and sincere learners in the training. He studiously completes all the pre-work and is 100% engaged throughout the training. But he starts getting frustrated with the unprofessionalism of his fellow students and the trainer's inability to keep the training laser-focused towards learning outcomes.

After a 4-hour Intro to Agile training for an enterprise-level audience, followed by a 2-day Scrum.org Professional Scrum Foundations (PSF) for Darrell's team, there was no mandatory follow-up by Darrell, other than to tell the students *"Now, go make it work."*After 30 days, an evaluation of the results would show:

- Poor understanding of theoretical fundamentals.
- Contradictory interpretations and arguments among students -
  - *"You are wrong. We need to do it my way because this is exactly what the trainer said."*
  - *"No! You are wrong. We need to do it my way. He might have said that, but this is what he actually meant!"*
- Darrel says - *"This is pure chaos! This is worse than how things were before the training. I wish I had never drunk this Agile kool-aid!"*

Sadly, this is not surprising and probably representative of most Agile Training and Coaching engagements, because the focus was on completing activities and not on business outcomes or results.

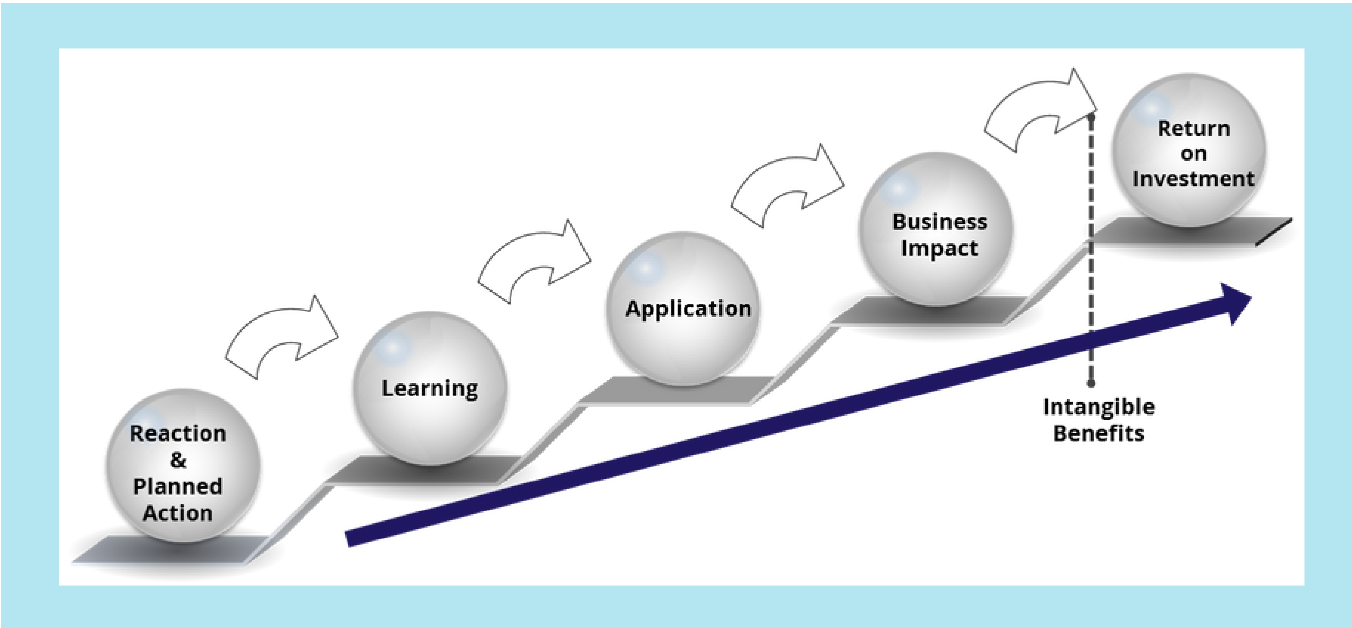
A Better Way

Results-based training and coaching programs have the following characteristics:

- Programs are initiated, developed and delivered with the end in mind.
- A comprehensive measurement and evaluation system is in place for each program.
- Impact and ROI evaluations are regularly developed.
- Program participants understand their responsibility to obtain results with programs.
- Support groups (management, immediate support, staff support, etc.) help to achieve results.

The ROI Methodology® is a balanced approach to measurement, developed by the ROI Institute®, that generates six types of data. Designing a training and coaching program with these levels of data while balancing impact with measures addressing individual's perspectives leads to training success. This, combined with systems and processes that support the transfer of learning, creates a complete story.

THE ROI METHODOLOGY® - Six types of Measures



Level 1: Reaction and Planned Action

Measures reaction to, and satisfaction with, the experience, contents and value of the training. Most training classes provide some sort of end-of-class questionnaire. Research has shown that asking the right questions can show a significant correlation with application of the knowledge obtained. The five key questions are:

1. Is the program relevant to the participants' needs?
2. Is the program important to their success?
3. Do they intend to use what they learned in the program?
4. Are participants willing to recommend the program to others?
5. Did the program provide participants with new information?

Level 2: Learning

Measures what participants learned in the program – information, knowledge, skills and contacts. This is probably the most used measure in Agile training, and the easiest to obtain, through the use of certification exams. Unfortunately, many times the measurement process stops here.

1. Do participants know what they are supposed to do and how to do it?
2. Are participants confident to apply their newly acquired knowledge and skills when they leave the program?

Level 3: Application

Measures progress after the program – the use of information, knowledge, skills and contacts. Measuring application and implementation provides evidence that the learning is transferring to the workplace; that employees are doing something different because of the learning.

1. To what extent are participants applying their newly acquired knowledge and skills?
2. How frequently are participants applying these skills?
3. How successful are participants with the application?
4. If they are applying their knowledge and skills, what is supporting their effort?

Level 4: Business Impact

Measures changes in business impact variables such as output, quality, time and costs linked to the program. Measuring business impact connects the program to important business measures. Improvement in productivity, quality, cost and time is critical.

1. What is the consequence of the application?
2. What is the change in the business measures connected to the program?

Level 5: Return on Investment (ROI)

Compares the monetary benefits of the business impact measures to the costs of the program. ROI is the ultimate measure of financial success of a training initiative. To calculate ROI, six steps of cost benefit analysis are taken:

1. Identify the improvements in impact measures.
2. Isolate the amount of improvement to the program.
3. Convert the improvements to monetary value.
4. Tabulate the fully-loaded costs of the program.
5. Identify the intangible benefits linked to the program.
6. Compare the monetary benefits to the cost in an ROI calculation.

Let's see how applying the ROI Methodology improved the learning experience and the results achieved.

Case 2

A few months later, Angie - The Director of Product Management gets funding for Agile training for her team of Product Owners. Having heard about Darrel's recent experience with Agile Training, Angie reaches out to him for advice and referrals. Darrell shares all his frustrations with Tre, their previous Agile Trainer and tells Angie to never hire him for any training ever again. Based on the lessons learned, Angie, engages Roy - an Agile Trainer certified by the ROI Institute, to deliver a 2-day Scrum.org Professional Scrum Product Owner (PSPO) workshop.

Roy negotiated a training participation agreement with Angie. Only the students and managers who agreed to honor the following participation agreement were eligible to attend training :

Pre-training expectations:

- No multi-tasking during training
- No streaming during training (even if its Tiger Woods ☺)
- Complete pre-training prep work:
  - Take an Open Assessment (practice test)
  - Read all pre-work resources
- Participate in the pre-training Product Owner (PO) Maturity Assessment to help categorize them in one of 5 stages of maturity

Post-training expectations:

Validate Learning:

- Complete the 1st PSPO-I certification attempt within 14 days of the end of the training
- Those who fail the 1st attempt would complete the 2nd PSPO-I certification attempt within 28 days of the end of the training

Apply learning:

- Complete an experiment using one technique taught in training within 4 weeks of the end of the training
- Hold themselves and fellow attendees accountable by presenting a lightning talk on their experiment and results in a Lunch & Learn scheduled around the 1 month mark after the end of training

Post-training coaching support:

- Attend weekly 90-minute team coaching sessions with all Product Owners to help each other learn and continuously progress on the Product Ownership Maturity Curve
- Attend a bi-weekly 60 minute 1x1 coaching session to work on topics that might not be appropriate for a team coaching session

Evaluate PO Maturity:

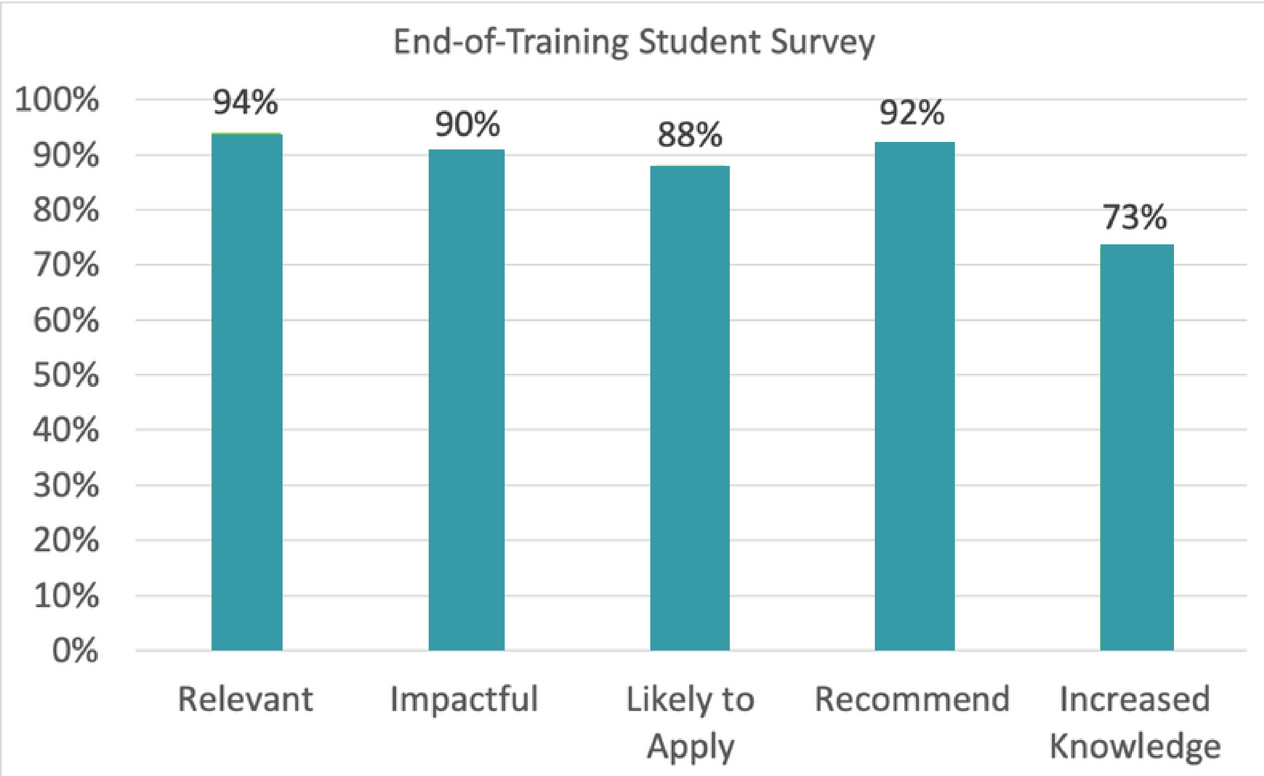
- Complete PO Maturity Assessment 4 months post-training

Utilizing the ROI Methodology

After conducting the training, Roy used the principles of the ROI Methodology® to assess the results of the training at all levels:

Reaction and Planned Action:

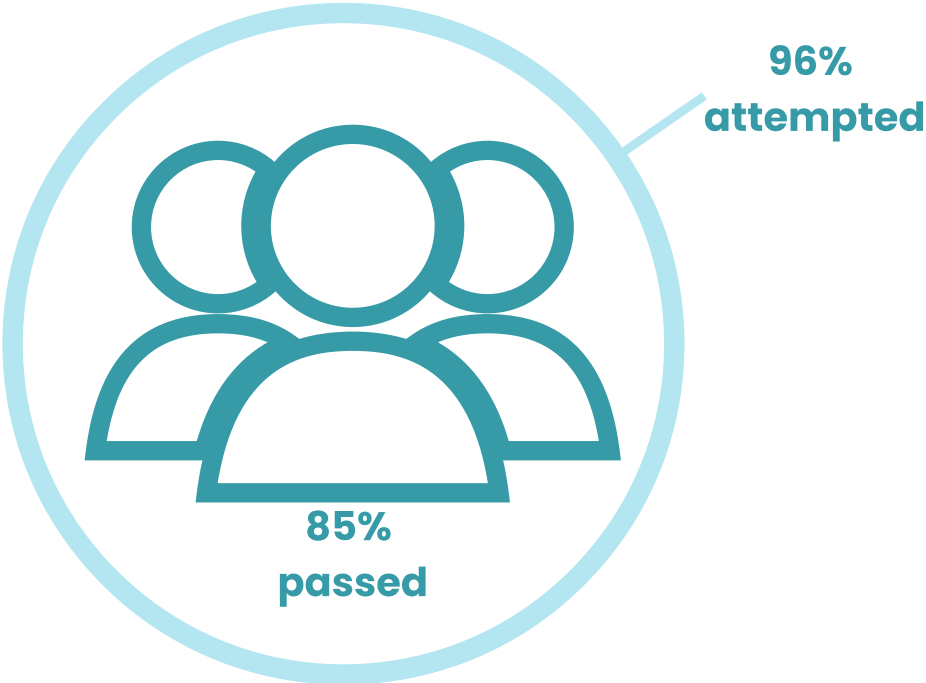
An end-of-training questionnaire designed for maximum correlation with predicted usage of the material showed the following results:



When used correctly, the Level 1 reaction questionnaire is a great source of data to predict the actual use of skills and knowledge. Based on the very positive class responses, Roy and Angie believed the training had a high probability of success.

Learning:

The target measure used to gauge the effectiveness of learning was the percentage of students who passed the PSPO-I assessment. The results were as follows:



Note: Some students who attended the training were not directly engaged as Product Owners. Attendees included managers and other support personnel. 100% of Product Owners passed the exam.

Application:

Executives and administrators often make the comment, “It’s not what the employees learn, it’s what they do with what they learn that’s important.”

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In order to portray the evidence that the learning was applied, Product Owners were provided with a Product Owner Playbook that reinforced many of the techniques from the PSPO training, and a maturity assessment was conducted.

Coaching was adjusted periodically based on these maturity assessments which included 4 types of feedback:

- Self-assessment
- Peer assessment
- Manager assessment
- Coach assessment

PO Playbook and Maturity Assessment

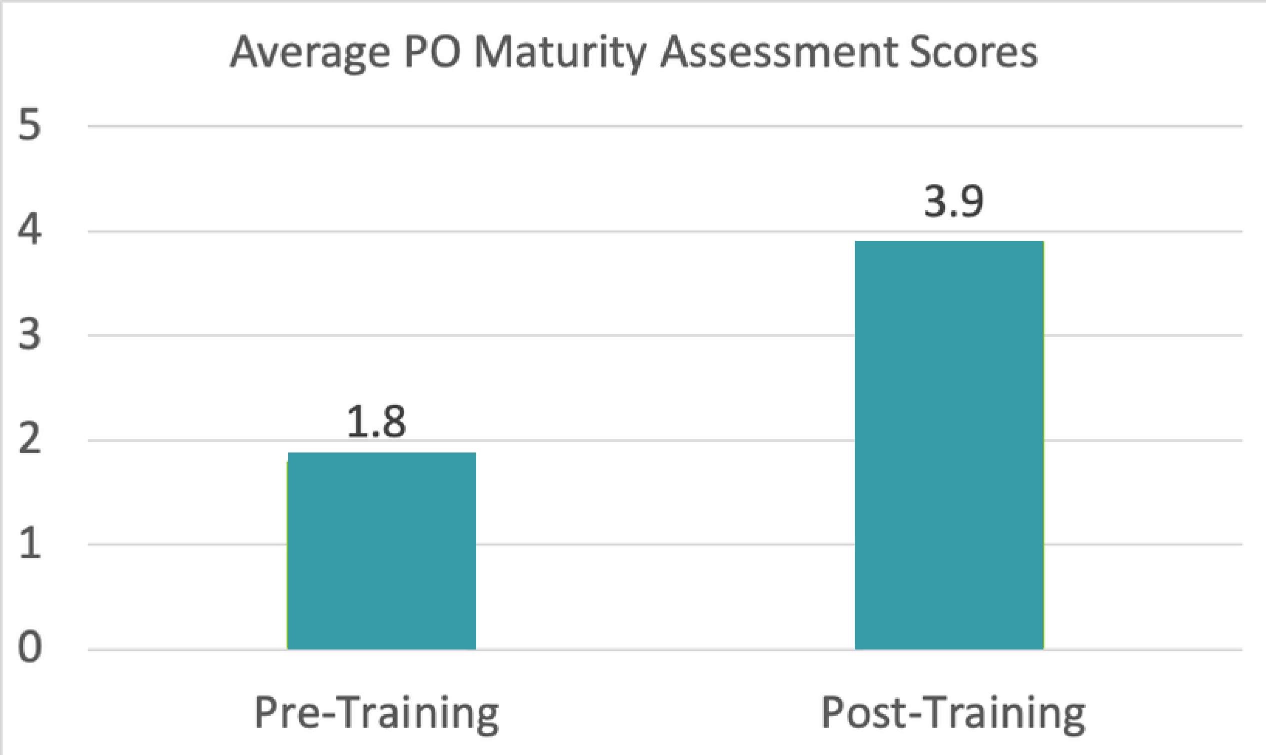
The PO Playbook included 12 plays that are listed below:

	PO Playbook Plays
1	PRODUCT VISION
2	PRODUCT PERSONAS
3	PRODUCT WIG (WILDLY IMPORTANT GOAL)
4	PRODUCT LEADING INDICATORS
5	PRODUCT SCOREBOARD
6	PRODUCT STRATEGIC PILLARS
7	PRODUCT INVESTMENT & EXPECTED ROI
8	PRODUCT BUSINESS MODEL
9	PRODUCT COMPETETIVE ANALYSIS
10	PRODUCT IMPACT MAPPING
11	PRODUCT ROADMAP
12	PRODUCT RELEASE FORECAST

Each PO was assessed on a 5-point maturity scale for each of these 12 plays based on the effectiveness with which they used the plays. The scores of each play were then aggregated to create an overall PO Maturity score.

Maturity Assessment Levels

The goal of the program was to bring every PO to a maturity level of 4.0 or higher within 4 months of the end of the training. Prior to the training, the average PO Maturity Score was 1.9. Four months later, this score had increased to 3.9.



This was a critical step in the ROI methodology, as it provided quantitative proof that students had not only learned the new skills from the PSPO training but were applying them every day as Product Owners.

Business Impact and ROI

Now that Angie had verified through the use of Application measures that the Product Owners were applying their newly acquired knowledge and skills, she worked with each PO to define a set of Business Impact measures that showed changes in impact variables such as output, quality, time to deliver and revenues or costs for their product. These included:

- Increased Revenue or Decreased Expenses
- Decrease in Waste – unused features, rework
- Decrease in time to market
- Increase in customer satisfaction and retention
- Increase in employee satisfaction and retention

A plan was initiated to track the respective measures that would be relevant for each product over the next 6 months, by creating value dashboards based on the principles of Evidence Based Management. At that point, the business impacts would be captured in quantifiable dollars and the ROI of the training could be calculated.

Conclusion

"Empiricism means working in a fact-based, experience-based and evidence-based manner. Scrum implements an empirical process where progress is based on observations of reality, not fictitious plans. Scrum also places great emphasis on mind-set and cultural shift to achieve business and organizational Agility. " - Scrum.org

The ROI Methodology® is a valuable tool for applying the principles of empirical process control to Agile and Scrum training. Transparency, inspection and adaptation are utilized throughout each step of the training and follow-on process to ensure that students don't just collect a certification or receive theoretical knowledge, but that their training is results-based:

- Training is initiated, developed and delivered with the end in mind.
- A comprehensive measurement and evaluation system is in place for each step.
- Impact and ROI evaluations are used consistently.
- Training participants understand their responsibility to obtain results from their new knowledge.
- Support groups (management, coaches, peers and team members) help training participants achieve results.

Today's economic climate means that anyone involved in training and development must be able to measure its effect on business performance. With a focus on tangible results, benefits and return on investment, the ROI Methodology provides a comprehensive framework for designing and delivering effective training for Agile and Scrum.

To Learn More, contact:

Org Whisperers for a free consultation on how you can create measurable ROI through Agile Training, Coaching and Consulting at hello@OrgWhisperers.com 214-785-5570

ROI Institute for ROI Certification, Training, Coaching and Consulting at info@roiinstitute.net 205-678-8101

About Org Whisperers:

Org Whisperers is a global I.T. Management Consulting firm that helps organizations apply Agile values, principles and practices to rapidly deliver innovative, high quality solutions to market. They offer training, coaching, staffing and consulting services based on scientific techniques and proven results. The Org Whisperers team has experience in guiding Agile Enablement for multi-billion dollar organizations, across diverse industries, with sizes of up to 350+ Agile teams and 5000+ Agile Team Members. By assessing agility, telling compelling stories, providing training, tools and coaching, Org Whisperers helps organizations develop strong, self-managing teams & inspiring leaders at all levels of the organization.

About ROI Institute®

ROI Institute, Inc., founded in 1992 as a service-driven organization, assists professionals in improving programs and processes using the ROI Methodology® developed by Dr. Jack J. Phillips and Dr. Patti P. Phillips. This Methodology is the global leader in measurement and evaluation including the use of return on investment (ROI) in non-traditional applications. ROI Institute regularly offers workshops, provides consulting services, publishes books and case studies and conducts research on the use of measurement and ROI. This makes ROI Institute the leading source of content, tools, and services in measurement, evaluation and analytics. By successfully completing this process, individuals are awarded the Certified ROI Professional® (CRP) designation, which is respected by executives in organizations worldwide.

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