

# 2022 Edition

## The Agile Coaching Growth Wheel





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## Introduction

*Agile coaching is an evolving profession encompassing many disciplines, including individual, team, and systemic coaching, facilitating, teaching, and mentoring, all applied with an open and deliberate bias towards using agile approaches to help address the client's needs.*

- [Agile Alliance Coaching Code of Ethics](#)

Agile coaching helps people who work in rapidly evolving situations become more effective and successful.

When we use the term “Agile” in this document, we are referring to philosophies, frameworks, processes, and techniques that help improve outcomes in evolving contexts, so “Agile” includes Lean Manufacturing, Lean Startup, Scrum, Extreme Programming, etc.

## What is the Agile Coaching Growth Wheel?

### The Growth Wheel

The Agile Coaching Growth Wheel is a tool for Agile Coaches, Scrum Masters, Leaders, and anyone who desires to increase their ability to help and grow teams and organizations using Agile principles and practices. The wheel allows you to reflect and grow on your Agile journey. This tool is also best used with another coach to help support them.

The wheel has eight segments or spokes, representing eight competency skills areas built around a hub of self-mastery. The tread around the outside of the wheel represents

your domain knowledge. These are knowledge areas that in turn support the skills of the main competency areas.

## Why create this wheel?

At the 2018 Agile Coaching Retreat in London, a collection of coaches came together in an effort to tackle the question “what are the skills needed to successfully coach teams and organizations in Agile?”.

As the use of Agile has become more and more mainstream the foundational definition of good Agile coaching skills has remained loosely defined and this lack of definition has resulted in unqualified people presenting themselves as Agile Coaches with little experience and low competence. This creates something of a lottery for organizations choosing the right people with the right skills for their needs.

The London retreat created the first generation of the Agile Coaching Growth Wheel, as an effort to address these questions and challenges.

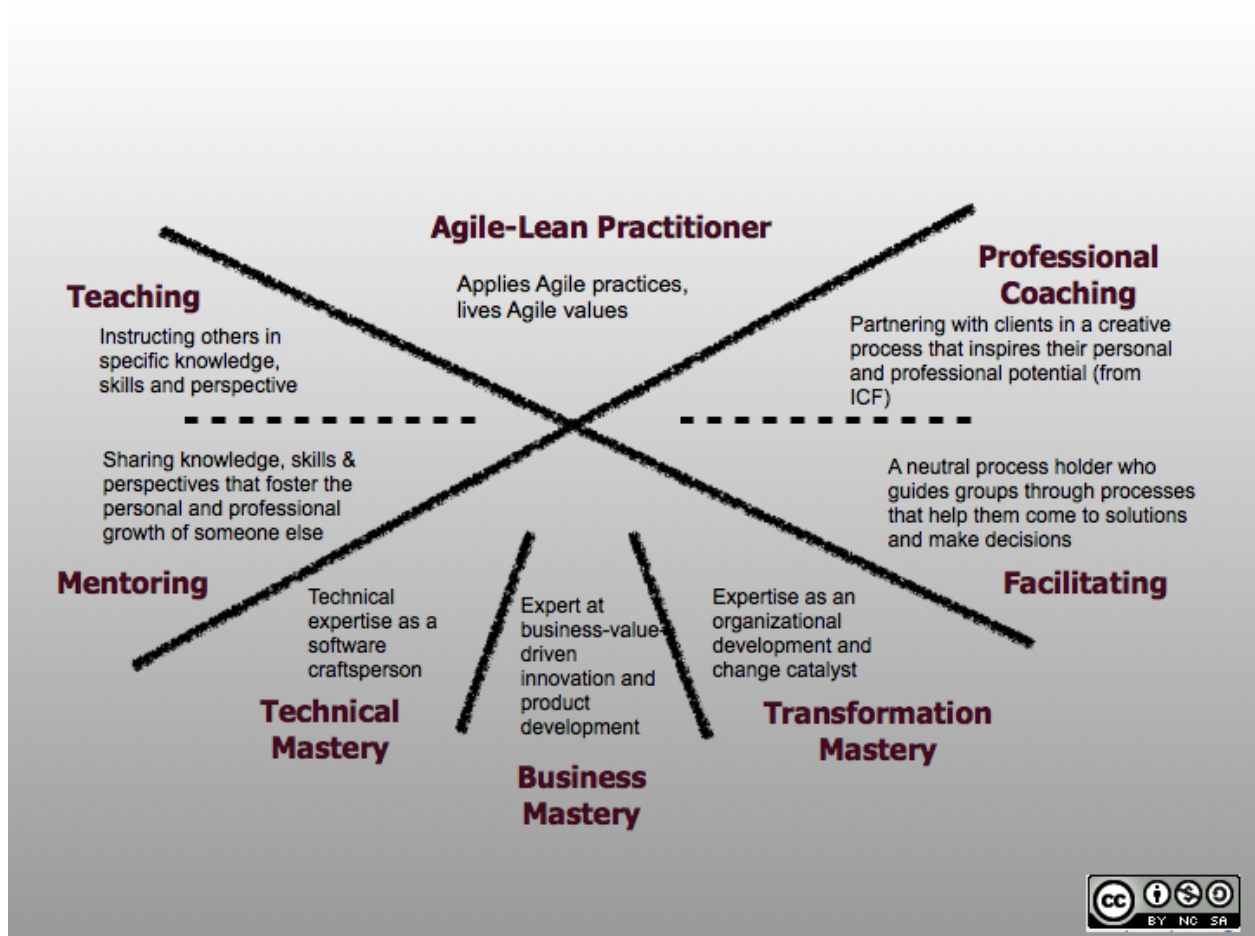
In 2020 Bob Galen wrote [Agile Coaches Need More Than Coaching Skills](#), which sparked a renewed conversation around what skills are essential to the craft of Agile Coaching. His blog was an implicit challenge to everyone in the Agile Coaching community to think about how we were presenting ourselves, growing ourselves, and helping the next generation of Agilist to be the best they could be.

Partly in response to Bob’s article, in the Spring of 2021 the Scrum Alliance hosted an Open Space with the question of “what competencies are needed for a successful Agile Coach.” The outcome of the Open Space was the formation of a working group whose goal was to “Professionalize the world of Agile Coaching.”

Using the 2018 Agile Coaching Growth Wheel as a start they refined it to what you see today. Our goal is that the Agile Coaching growth wheel lays down the core competencies that allow practitioners to go from good to great through a reflective process with clear guidance to assess their progress.

## Where We Came From, On the Shoulders of Giants

In 2011 Lyssa Atkins and Michael Spayd created a competency framework for Agile Coaches. Intentionally this was not a competency model, as it did not define specific behaviors, skills, knowledge, or proficiency levels. The “X-Wing” model, as it is commonly known, is built around the idea of Mastery Areas and a personal coaching stance to act as a guiding star when choosing which of four skills to use: coaching mentoring facilitating and teaching.



For over a decade the Adkins/Spayd model has been the gold standard for defining the skills and competencies of Scrum Masters and Agile Coaches. It was the logical place to start from when the 2018 London coaches sought to take it to the next level.

We can't thank Lyssa or Michael enough for the work they have done to professionalize the world of Agile Coaching. They have been a constant source of inspiration to all of the volunteers that have worked on this project.

Recognizing this solid foundation, the contributors of this work believe that more definition is required to further professionalize the world of Agile Coaching and the result is the Agile Coaching Growth Wheel initiative.

## Where are we going?

Defining the Agile Coaching journey will allow educators, coaches, and leaders to better support the growth of Agile Coaching competencies in individuals by developing

learning and development programs and aligning competencies to the formal Agile Coaching certifications that already exist. It will also build confidence in the industry around the future profession of any job roles that involve the use of Agile Coaching skills. We are making it easier for an Agile organization to select the right person for the right job with confidence.

The next step is to complete the Agile Growth Wheel with all nine competencies fully defined and aligned to the skill progression path. Once this is complete the intent is to build out resources that will guide a learner to developing specific competencies to the level they need or desire.

The Scrum Alliance has committed to using the final Growth Wheel as a foundation for updating its coaching certifications and it is hoped that other Agile and Scrum bodies will recognize the Wheel as a new standard in Agile Coaching and the entire community can step towards professionalizing the world of Agile Coaching.

## How to use the wheel and guidance?

The purpose of this wheel is to help you self-reflect or reflect with a coach, mentor, or colleague. The objective here is to help you understand where you are so that you can explore and develop further.

### **Step 1: Identify an area of improvement**

Walk through each of the competency areas (the 8 spokes and the self-mastery hub), use the guidance below to make sure you have a high-level understanding of each area. You can't improve everything at once, so select an initial area of focus to work on.

### **Step 2: Reflect on a competency area**

For each competency within the competency area, go through the guidance and assess your competence against the 5 levels of assessment. Use the definitions and challenge yourself on your competence levels. The goal is not to get to level 5, the goal is to know where you are and where you want to go next in your journey.

### **Step 3: Brainstorm options and generate actions.**

Use the insight generated in the reflection to brainstorm options for growth and then formulate a plan of action. This part works best working with a coach, mentor, or colleague.

### **Step 4: Inspect, Adapt, Repeat**

The rest of the guidance is just that: guidance. The detail against each level for a specific competence is meant as reflection, not as a checklist. There may be guidance

at the practitioner level that you cannot fulfill 100%, perhaps they are not vital to you or your context. As you explore the guidance, you might find a better fit for yourself.

## Introduction the Nine Core Competency Areas

**Self Mastery:** At the heart of great agile coaching is the need to invest in yourself through learning and reflection and take care of your wellbeing. Self-mastery starts with a focus on yourself, having the emotional, social, and relationship intelligence to choose how you show up in any given context.

**Agile/Lean Practitioner:** an Agile/Lean practitioner has a deep and tacit understanding of the principles behind Agile and Lean and has experience in working with frameworks and practices of Agile and Lean.

**Serving:** serving is about being concerned with the needs of the team or business over your own agenda. They do this from the stance of Servant Leadership which focuses primarily on the growth and well-being of the team or business and the communities to which they belong.

**Coaching:** coaching is partnering with a person, team, or organization (client) in a creative process to help the client to reach their goals by unlocking their own potential and understanding. A coach is able to accept the client as a whole and capable, and serve their agenda ethically.

**Facilitating:** facilitating increases the effectiveness of a group of people to align in a collaborative way, to interpret their context, and mutually identify the most valuable outcomes desired. A facilitator has the skills to create a neutral environment of openness, safety, and innovation in a group setting.

**Guide Learning:** guide learning is about effectively growing an individual, a group, or a team's skills and enabling them to be competent and resourceful. With this competency, you choose the most effective learning method to help the learner achieve their learning objectives and inspire future learning.

**Advising:** advising is the ability to bring your experience, insights, and observations to guide the client towards a shared understanding of the value that can help them to achieve sustainable success, even after you have moved on. As a trusted adviser, you are invested in the success of the client, creating a long-term and sustaining relationship with the client.

**Leading:** leading is about being the change you want to see to make the world a better place. As a leader, you are capable of catalyzing growth and inspiring others to realize the shared vision.

**Transforming:** transforming is guiding sustainable change that will allow the individual teams and the organization to be more effective and learn how to change for themselves through leading, facilitation, coaching, facilitating learning, and advising.

## Measuring Your Competency

Skill in a competency area is not a simple binary. Skill mastery is a progression from no knowledge to unconscious mastery. The Agile Coaching Growth Wheel has five growth levels based on the [Dreyfus Model of Skill Acquisition](#).

### Competency Level Definitions

Stage	Description
<b>Beginner</b>	<p>A beginner in the use of Agile Coaching practices has only textbook knowledge with no practical experience. The beginner will typically adhere closely to defined rules or plans and work closely with a more experienced individual. An individual who focuses on learning and is given a chance to practice will generally advance to higher levels of competency in a short period of time.</p> <p>A beginner typically begins to develop the competency by working with a single team and with the support of a more experienced coach or mentor (especially if the single team is part of a larger whole). A beginner with Agile Coaching practices moves to the Advanced Beginner level by showing comprehension of the competencies in the Agile Coaching Growth Wheel, trying to work on their own, taking on a larger task, repeating results, and showing the desire to learn more context.</p>
<b>Advanced Beginner</b>	<p>An advanced beginner, in Agile Coaching practices, has practical experience in the application of the Agile Coaching Growth Wheel competencies. At this level, an individual will be able to interpret and apply straightforward techniques with minimal support from a more experienced coach or mentor and be able to pair to undertake more complex tasks.</p> <p>While an advanced beginner will be capable of identifying complex issues, they will generally only have a limited ability to resolve them. At this level, someone using Agile Coaching practice will typically have difficulty</p>

	determining which aspects are of greatest importance in a particular situation.
<b>Practitioner</b>	A practitioner can demonstrate working knowledge of all aspects of the Agile Coaching Growth Wheel. An Agile Coaching practitioner will be able to analyze and differentiate various solutions to apply in their work without close supervision and possess the planning skills required to enable them to deal with complex issues or resolve conflicting priorities. At this level, the practitioner should be capable of using repeatable procedures to produce acceptable results and be able to plan towards longer-term goals.
<b>Guide</b>	At the guide level, the individual has in-depth knowledge of the Agile Coaching Growth Wheel competencies. They will be able to synthesize coaching solutions from the existing bodies of knowledge within Agile/Lean and beyond, and tailor them to specific instances in all save the most complex or exceptional of situations and can effectively guide the work of others.  An Agile Coaching Guide will usually be able to intuitively assess the best course of action to take in a given situation and understand how and when to apply guidelines.
<b>Catalyst</b>	A Catalyst has a deep tacit understanding of the Agile Growth Wheel competencies. This individual will be able to modify or alter standards and develop new and innovative approaches to deal with unusual situations. A Catalyst will be able to easily produce high-quality results and be able to develop a vision of what is possible.

## The Competency Areas

As Agile Coaching professionals we start with a core of self-mastery and then draw on each of the eight competency areas to enhance our practices. It should be noted that none of these competency areas exist in a vacuum and they are expected to all work in conjunction. It is also expected that learning is continuous and ongoing. While there are only five levels of competency progression, there is no upper boundary to the learning possible.

*“I only know that I know nothing. Every time you think you have learned something, you can let go of it to continue learning.” Socrates*



## Start with Ethics

As an agile coaching practitioner ethics are central to your practice when using any of the core skills. This is important for your own personal growth, the good of our clients and the integrity of the profession. You may base your ethical approach on such sources as:

- Agile Alliance: Code of Ethical Conduct for Agile Coaching  
<https://www.agilealliance.org/agilecoachingethics/>
- ICF: code of ethics <https://coachingfederation.org/ethics/code-of-ethics>
- IAF: code of ethics  
<https://www.iaf-world.org/site/pages/statement-values-code-ethics>

Self-mastery and ethics intermingle, the more Self-mastery you have the more you will be in touch with your abilities to uphold your ethical code of conduct, to understand when you have transgressed and to be able to repair the harm.

## Self Mastery

Self-mastery practices are the need to invest in yourself through reflection, learning, and taking care of your wellbeing. Self-mastery starts with you having your own emotionally intelligent relationship with yourself and others. You understand how Emotional Intelligence supports Relationship Intelligence, Social Intelligence, and the systems that you interact with.

A core of Self-Mastery creates the platform for effective use of all the other competencies of the Agile Coaching Growth wheel. The level of your self-mastery will influence your potential in the other competencies. To achieve self-mastery you must focus on:

## Emotional Intelligence

When we grow our Emotional Intelligence we have access to improved mental health, greater job performance and more effective leadership skills.

- **Self-Awareness** - Know yourself; know your impact. Gaining a fundamental understanding of yourself, your personal cultural beliefs and biases, your strengths and weaknesses, your skills and knowledge, and your values. These are a prerequisite for knowing the impact you have in any situation.
- **Self-Regulation** - You are able to regulate your emotions and your energetic field in a conscious way. This gives you the ability to choose how you show up, and shift in the moment when necessary and to hold appropriate boundaries.

- **Systems impact** - You have the ability to understand your impact, determine if it differs from your intention, and fluidly change the way you show up in order to achieve the desired impact. The ability to understand when you have transgressed a boundary, and the skill to repair the relationship.

**Competency Level Definitions:**

Level	Reflection
<p><b>1</b> <b>Beginner</b></p>	<p><b>Self-Awareness</b></p> <ul style="list-style-type: none"> <li>● <b>Identify</b> major emotions, such as happy, sad, angry in self and others.</li> <li>● <b>Aware</b> that people have their own values and a belief systems.</li> </ul> <p><b>Self-Regulation</b></p> <ul style="list-style-type: none"> <li>● <b>Able</b> to regulate some emotional states or behaviors.</li> <li>● <b>Understand</b> that you can attain self-regulation.</li> </ul> <p><b>Systems Impact</b></p> <ul style="list-style-type: none"> <li>● <b>Aware</b> of the concept of systems, and that you as an individual, are part of a system and that teams exist in a larger system.</li> </ul>
<p><b>2</b> <b>Advanced Beginner</b></p>	<p><b>Self-Awareness</b></p> <ul style="list-style-type: none"> <li>● <b>Recognize</b> a larger set of more nuanced emotional states.</li> <li>● <b>Aware</b> of some of your own values and beliefs.</li> </ul> <p><b>Self-Regulation</b></p> <ul style="list-style-type: none"> <li>● <b>Demonstrate</b> an understanding when self-regulation is not happening.</li> <li>● <b>Control</b> your emotions and behavior to achieve a specific impact.</li> <li>● <b>Describe</b> some self-regulation techniques that can lead to more successful outcomes.</li> </ul> <p><b>Systems Impact</b></p> <ul style="list-style-type: none"> <li>● <b>Understand</b> common systems that exist in organizational structures.</li> <li>● <b>Identify</b> positive and negative impacts that may occur when the systems interact.</li> </ul>

	<ul style="list-style-type: none"> <li>● <b>Recognize</b> when a system is out of alignment, and know that the system may need assistance in resolution.</li> </ul>
<p><b>3</b> <b>Practitioner</b></p>	<p><b>Self-Awareness</b></p> <ul style="list-style-type: none"> <li>● <b>Recognize</b> and name your own emotional state at any given time.</li> <li>● <b>Recognize</b> that you have blind spots, and begin to identify them.</li> <li>● <b>Identify</b> most of your own values and beliefs.</li> </ul> <p><b>Self-Regulation</b></p> <ul style="list-style-type: none"> <li>● <b>Choose</b> your own response in most situations.</li> <li>● <b>Able</b> to match your emotional state to the energetic field in some cases.</li> <li>● <b>Plan</b> in advance for some complex scenarios.</li> </ul> <p><b>Systems Impact</b></p> <ul style="list-style-type: none"> <li>● <b>Understand</b> systemic values and the impact of your values on the system.</li> <li>● <b>Recognize</b> complex issues within single systems, and work to resolve some</li> <li>● <b>Recognize</b> the impact of systems within systems (i.e. teams within a department), and is able to work to align those in a healthy way.</li> </ul>
<p><b>4</b> <b>Guide</b></p>	<p><b>Self-Awareness</b></p> <ul style="list-style-type: none"> <li>● <b>Understand</b> and anticipate your own triggers.</li> <li>● <b>Understand</b> your own values system and be aware that it is at choice about whether to live by them or not.</li> </ul> <p><b>Self-Regulation</b></p> <ul style="list-style-type: none"> <li>● <b>Regulate</b> your emotions and energetic field in a conscious way in most situations.</li> <li>● <b>Choose</b> how you show up, shift in the moment when necessary, and hold appropriate boundaries.</li> </ul> <p><b>Systems Impact</b></p> <ul style="list-style-type: none"> <li>● <b>Assess</b> systems intuitively and know what the best course of action is to take in any given situation.</li> <li>● <b>Understand</b> clearly the difference between your own intention and impact, and know when they differ.</li> </ul>
<p><b>5</b></p>	<p><b>Self-Awareness</b></p>

<b>Catalyst</b>	<ul style="list-style-type: none"> <li>● <b>Know</b> yourself deeply and are aware of your emotional state at any given moment.</li> <li>● <b>Choose</b> intentionally whether or not to live your values and beliefs.</li> </ul> <p><b>Self-Regulation</b></p> <ul style="list-style-type: none"> <li>● <b>Shift</b> your emotional state at will.</li> <li>● <b>Choose</b> how to respond in any given situation.</li> </ul> <p><b>Systems Impact</b></p> <ul style="list-style-type: none"> <li>● <b>Understand</b> the breadth of ways to lead, and choose the appropriate stance in the moment.</li> <li>● <b>Work</b> with systems to help them evolve.</li> </ul>
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## Balance

Taking time for yourself and seeking balance, learning how to integrate all parts of your life in a healthful way. It's also important to be aware when you are out of balance and be able to re-balance when needed. Balance encompasses understanding your physical, mental, and spiritual well-being. It also incorporates the intersection of work and play, and the cultivation of supportive structures, communities, and interests in your life.

### Competency Level Definitions:

Level	Reflection
<b>1 Beginner</b>	<ul style="list-style-type: none"> <li>● <b>Recognize</b> the various aspects of your life that require energy and attention.</li> <li>● <b>Understand</b> that at times you may be out of balance, but may not know how to achieve balance.</li> <li>● <b>Contrast</b> dysfunctional behaviors versus healthy behaviors.</li> </ul>
<b>2 Advanced Beginner</b>	<ul style="list-style-type: none"> <li>● <b>Creates</b> some healthy boundaries.</li> <li>● <b>Build</b> close personal supportive structures.</li> </ul>
<b>3 Practitioner</b>	<ul style="list-style-type: none"> <li>● <b>Understand</b> the intersection between work and play, and how to move between them.</li> <li>● <b>Recognize</b> when you are out of balance quickly and regain balance.</li> </ul>

	<ul style="list-style-type: none"> <li>● <b>Build</b> a wider support system, which may include professionals or organizations in addition to personal support.</li> <li>● <b>Understand</b> when you have transgressed a boundary and are able to make the repair with the other party.</li> </ul>
<b>4 Guide</b>	<ul style="list-style-type: none"> <li>● <b>Balance</b> all areas of life consistently, including work, play, family and community, physical health, and spiritual or emotional work.</li> <li>● <b>Recognize</b> immediately when you are out of balance, and are able to recover on their own or with the help of support systems.</li> <li>● <b>Hold</b> professional and personal boundaries appropriately, and is in congruence with all professional ethical guidelines.</li> </ul>
<b>5 Catalyst</b>	<ul style="list-style-type: none"> <li>● <b>Live</b> in balance with grace.</li> <li>● <b>Impact</b> others through their presence.</li> </ul>

### Personal Transformation

Be the change you want to see by modeling the transformation you want others to experience. Valuing and investing in your own personal growth through reflection, seeking, learning, and the integration of all you have learned. You also work with peers, mentors, or coaching supervisors to accelerate your skills and mastery. You understand that your transformational journey is never complete.

### Competency Level Definitions:

Level	Reflection
<b>1 Beginner</b>	<ul style="list-style-type: none"> <li>● <b>Recognize</b> that you may benefit from learning new skills and growing your competencies.</li> <li>● <b>Create</b> a clear understanding of where you have growth opportunities, and may seek help from others.</li> </ul>
<b>2 Advanced Beginner</b>	<ul style="list-style-type: none"> <li>● <b>Learn</b> from others who have skills or abilities that you desire for yourself.</li> <li>● <b>Invest</b> in personal growth, through education, mentorship, introspection, etc.</li> </ul>

<b>3 Practitioner</b>	<ul style="list-style-type: none"> <li>● <b>Recognize</b> that personal transformation is an ongoing activity that has no end.</li> <li>● <b>Engage</b> a mentor, and may mentor others.</li> <li>● <b>Aware</b> of your growth opportunities.</li> <li>● <b>Aware</b> that transformation impacts not just what you know, but also who you are.</li> </ul>
<b>4 Guide</b>	<ul style="list-style-type: none"> <li>● <b>Weave</b> personal growth and transformation into your daily life.</li> <li>● <b>Integrate</b> being and doing.</li> <li>● <b>Assist</b> others on their own transformation journeys, through mentoring and coaching.</li> </ul>
<b>5 Catalyst</b>	<ul style="list-style-type: none"> <li>● <b>Live</b> the change you want to see in the world.</li> <li>● <b>Impact</b> others through your presence.</li> </ul>

## Agile and Lean Practitioner

An Agile/Lean practitioner has a deep and tacit understanding of the principles behind Agile and Lean and has experience in working with frameworks and practices of Agile and Lean.

The term Agile was originally coined as part of the Manifesto for Agile Software Development and defined by 4 values and 12 guiding principles. The idea of agility has transcended the Manifesto and evolved beyond software to meet a wider organizational context, but it retains a philosophy that can be seen clearly in that Manifesto.

The term Lean originates from Lean Manufacturing and Lean Product Development, although the word Lean has also been subsequently used in many contexts. Many of the ideas that are aligned with Agile and Lean concepts can be seen in many Agile Frameworks, Methods and Practices.

### Agile and Lean Mindset

Being an Agile and Lean practitioner, you start with a deep understanding of its values, and principles. This allows us to apply frameworks, methods and practices in the way they were intended, and then to experiment with empirical evidence, to meet an ever-changing world. Remaining true to the underlying paradigm allows us to create a belief system where agility can flourish.

The Agile values and principles guide our thinking and actions when approaching new situations. They can be traced back to the Manifesto for Agile Software Development and before that Lean Manufacturing and Lean Product Development, and cover concepts such as (but not limited to):

- Trusting and supporting people to work together in small self-managing teams.
- High-quality simple products that improve the lives of the customer.
- Delighting customers by collaborating to regularly deliver tangible value.
- Build products that can adapt to the needs of the customer.
- Continuously improve the way we work.
- Optimizing our organizations for flow by eliminating waste through leveraging small batches within the shortest possible lead time.

### Competency Level Definitions:

Level	Reflection
<b>1 Beginner</b>	<ul style="list-style-type: none"> <li>● <b>Summarize</b> the Agile values.</li> <li>● <b>Describe</b> the Agile Manifesto and its principles.</li> <li>● <b>Aware</b> of Lean Thinking.</li> </ul>
<b>2 Advanced Beginner</b>	<ul style="list-style-type: none"> <li>● <b>Discuss</b> how your behaviors relate to Agile principles.</li> <li>● <b>Explain</b> how the values and principles of the Agile Manifesto are present in how your team works.</li> <li>● <b>Recognize</b> when decisions help or hinder the adoption of agile principles.</li> <li>● <b>Describe</b> the origins of Lean Thinking.</li> <li>● <b>Explain</b> the core concepts of Lean Thinking and how they can be applied.</li> </ul>
<b>3 Practitioner</b>	<ul style="list-style-type: none"> <li>● <b>Contrast</b> two examples where you applied an open experimental mindset.</li> <li>● <b>Analyze</b> your personal fulfillment of the Agile mindset and identify how you can improve.</li> <li>● <b>Illustrate</b> at least two examples of how you actively applied Agile value(s) in your work.</li> <li>● <b>Contrast</b> Lean Process and Lean Thinking.</li> <li>● <b>Associate</b> Lean principles and Agile approaches.</li> <li>● <b>Apply</b> lean principles in your work.</li> </ul>

<b>4 Guide</b>	<ul style="list-style-type: none"> <li>● Guide level guidance will be provided in a future update.</li> </ul>
<b>5 Catalyst</b>	<ul style="list-style-type: none"> <li>● Catalyst level guidance will be provided in a future update.</li> </ul>

## Frameworks and Practices

Being an Agile and Lean Practitioner you will have a deep understanding of a large number of frameworks, methods and practices that support teams and the wider organization in being agile. Using these creates agile habits that lead to changes in behavior and eventually to a change in mindset and culture.

- **Frameworks, Methods and Approaches** - Provide a minimal set of boundaries that allow a team and/or organization to learn to be Agile and deliver tangible value. Below is an example list of frameworks and methods, this is not a definitive list and as you gain experience you will experiment with many others and even adapt approaches outside of the agile family.
  - Scrum, Kanban, Feature Driven Development, DevOps, eXtreme Programming, Lean Start-up, Lean Product Development, Theory of Constraints, Systems and Complexity thinking, provide some of the core frameworks.
  - LeSS, Nexus, SAFe and Scrum@Scale are examples of scaling/descaling frameworks.
  - Holacracy, Humanocracy, Sociocracy 3.0 and many others, are helping organizations experiment with patterns that help with wider business agility.
- **Practices** - Provide techniques and tools that enhance the use of Frameworks and Methods. There are lots of practices that support Agile / Lean ways of working and depending on context and team maturity, the practices used will change over time. Some examples of common practices are:
  - User Stories, User Story Mapping, Impact Mapping, Product Vision
  - Estimation, Agile Metrics, Information radiators
  - Value stream mapping, Causal Loop Diagrams
  - Test-Driven Development, Pairing, Refactoring, Automation
  - Communities of Practice, Learning Dojo's



Your challenge is to discover or create new Practices and to have fun experimenting with them.

### Competency Level Definitions:

Level	Reflection
<p><b>1</b> <b>Beginner</b></p>	<p><b>Frameworks/Methods and Approaches</b></p> <ul style="list-style-type: none"> <li>● <b>Describe</b> at least one Agile approach and how it relates to the Agile Manifesto.</li> <li>● <b>Outline</b> the historical development of Agile.</li> </ul> <p><b>Practices</b></p> <ul style="list-style-type: none"> <li>● <b>Explain</b> at least three Agile practices commonly used by Agile teams.</li> </ul>
<p><b>2</b> <b>Advanced Beginner</b></p>	<p><b>Frameworks/Methods and Approaches</b></p> <ul style="list-style-type: none"> <li>● <b>Identify</b> the knowledge and skills to maintain the distinctions between agile and "alternative" ways of working.</li> <li>● <b>Apply</b> a prescribed framework or method, using all of its elements in at least one situation.</li> <li>● <b>Describe</b> at least three Lean/Agile development frameworks/methods and explain their value.</li> </ul> <p><b>Practices</b></p> <ul style="list-style-type: none"> <li>● <b>Explain</b> how at least three practices are aligned (or not) with the values and principles of the Agile Manifesto.</li> <li>● <b>Support</b> teams to apply existing practices in a more Agile way.</li> <li>● <b>Explain</b> how you have helped a team increase the quality of delivery through continually improving its practices.</li> </ul>
<p><b>3</b> <b>Practitioner</b></p>	<p><b>Frameworks/Methods</b></p> <ul style="list-style-type: none"> <li>● <b>Demonstrate</b> how you have moved a team to an agile way of working.</li> <li>● <b>Apply</b> at least two frameworks or methods in multiple situations.</li> <li>● <b>Aware</b> of changing Agile trends and newer methods in the industry.</li> </ul>

	<p><b>Practices</b></p> <ul style="list-style-type: none"> <li>● <b>Analyze</b> the benefits of a wide range of Agile practices and can help the team adopt them as appropriate.</li> <li>● <b>Integrate</b> at least three Agile development practices with Lean practices.</li> <li>● <b>Apply</b> Agile practices beyond the team.</li> <li>● <b>Explain</b> at least three benefits of supporting strong technical practices when working with multiple teams.</li> </ul>
<p><b>4 Guide</b></p>	<ul style="list-style-type: none"> <li>● Guide level guidance will be provided in a future update.</li> </ul>
<p><b>5 Catalyst</b></p>	<ul style="list-style-type: none"> <li>● Catalyst level guidance will be provided in a future update.</li> </ul>

## Serving

While servant leadership is a timeless concept, the phrase “servant leadership” was coined by Robert K. Greenleaf in *The Servant as Leader*, an essay that he first published in 1970. In that essay, Greenleaf said:

“The servant-leader is a servant first... It begins with the natural feeling that one wants to serve, to serve first. Then conscious choice brings one to aspire to lead. That person is sharply different from one who is a leader first, perhaps because of the need to assuage an unusual power drive or to acquire material possessions... The leader-first and the servant-first are two extreme types. Between them, there are shadings and blends that are part of the infinite variety of human nature.

“The difference manifests itself in the care taken by the servant first to make sure that other people’s highest priority needs are being served. The best test, and difficult to administer, is: Do those served grow as persons? Do they, while being served, become healthier, wiser, freer, more autonomous, more likely themselves to become servants? And, what is the effect on the least privileged in society? Will they benefit or at least not be further deprived?”.

A servant-leader focuses primarily on the growth and well-being of people and the communities to which they belong. While traditional leadership generally involves the accumulation and exercise of power by one at the “top of the pyramid,” servant leadership is different. The servant-leader shares power and puts the needs of others first and helps people develop and perform as highly as possible.

Being a servant-leader is the very essence of agile coaching.

### Serving the Business

The business we serve here includes users, customers, internal stakeholders, and anybody else who cares about **what** is being delivered.

You help businesses delight their customers, through focusing on customer needs and using agile to accelerate learning and value delivery. They have the knowledge and skills, that serves the business in several ways, including their ability to facilitate, teach, advise and support:

- **Understanding Customers** - Customer Research and Product Discovery.

- **Purpose & Strategy** - developing practical product strategies, product planning, and forecasting, and product economics.
- **Managing the Backlog** - differentiating outcome and output, defining value, ordering items, and product backlog refinement.
- **Supporting Business Stakeholders** - supports the learning and growth of the Product Owner and other business stakeholders.

## Competency Level Definitions:

Level	Reflection
<b>1</b> <b>Beginner</b>	<p><b>Understanding Customers</b></p> <ul style="list-style-type: none"><li>● <b>Describe</b> at least one technique to prioritize between conflicting customer (or user) needs.</li><li>● <b>Describe</b> at least three aspects of product discovery and identify how each contributes to successful product outcomes.</li><li>● <b>List</b> at least three approaches to connect the team directly to customers and users.</li></ul> <p><b>Purpose &amp; Strategy</b></p> <ul style="list-style-type: none"><li>● <b>Outline</b> an approach for the creation of a product vision.</li><li>● <b>List</b> an approach to communicating progress with stakeholders.</li><li>● <b>Describe</b> the relationship between outcome and output.</li></ul> <p><b>Managing the Backlog</b></p> <ul style="list-style-type: none"><li>● <b>Explain</b> at least two approaches to identify small, valuable slices of work to maximize outcomes.</li><li>● <b>Describe</b> at least one approach to making sure work is refined enough for the team.</li><li>● <b>Describe</b> at least 4 properties of a well-structured Product Backlog.</li></ul> <p><b>Supporting Business Stakeholders</b></p> <ul style="list-style-type: none"><li>● <b>Describe</b> at least two stakeholder behaviors that support the team's success and at least two behaviors that do not support the team's success.</li></ul>

2

Advanced  
Beginner

### Understanding Customers

- **Practice** at least one technique to support teams learning by connecting them directly to customers and users.
- **Examine** the impact of product work on customers, stakeholders, and/or the organization.
- **Compare** at least two approaches to validating assumptions in order to inspect and adapt.

### Purpose & Strategy

- **Discuss** a real-world example of how product strategy is operationalized and evolves over time in an Agile organization.
- **Practice** at least one technique to visualize and communicate product strategy, product ideas, features, and/or assumptions.
- **Facilitate** the creation (or refinement) of the product vision between stakeholders, the Product Owner, and the team.

### Managing the Backlog

- **Apply** at least one technique to assist the Product Owner in creating a smooth flow of work, ensuring that enough Product Backlog items of the right type are “ready” for the upcoming period of work.
- **Facilitate** at least two techniques for moving from a product vision to a Product Backlog. Show how these can be organized, ordered, and filtered within a Product Backlog to link to product goals or strategies.
- **Apply** at least two techniques to model value and at least two techniques to measure value.

### Supporting Business Stakeholders

- **Explain** agile to business stakeholders.
- **Build** a coaching relationship with at least one business stakeholder and help them become more effective.
- **Teach** business stakeholders different practices for making decisions aligned to product strategy.

<p><b>3</b> <b>Practitioner</b></p>	<p><b>Understanding Customers</b></p> <ul style="list-style-type: none"> <li>● <b>Mentor</b> business stakeholders in the integration of product discovery into development.</li> <li>● <b>Facilitate</b> at least three techniques for customer research or product discovery.</li> <li>● <b>Facilitate</b> the selection of an appropriate experiment to test a hypothesis and evaluate the results.</li> </ul> <p><b>Purpose &amp; Strategy</b></p> <ul style="list-style-type: none"> <li>● <b>Facilitate</b> the development of a business model and competitive analysis for a product idea.</li> <li>● <b>Apply</b> at least two methods to calculate the expected outcome or economic results of a product.</li> <li>● <b>Explain</b> an iterative and incremental investment model for product development.</li> </ul> <p><b>Managing the Backlog</b></p> <ul style="list-style-type: none"> <li>● <b>Assess and recommend</b> improvements for how teams and/or organizations emphasize outcomes over output, and how this is reflected in a Product Backlog.</li> <li>● <b>Support</b> the Product Owner in the selection of an appropriate value creation strategy, using product data to make an informed decision on what to build next.</li> <li>● <b>Apply</b> techniques to structure and order single team and multi-team product backlog to create transparency and understanding.</li> </ul> <p><b>Supporting Business Stakeholders</b></p> <ul style="list-style-type: none"> <li>● <b>Facilitate</b> Lean experiments.</li> <li>● <b>Build</b> a coaching relationship with multiple Product Owners and business stakeholders in order to help them become more effective.</li> </ul>
<p><b>4</b> <b>Guide</b></p>	<p><b>Understanding Customers</b></p> <ul style="list-style-type: none"> <li>● <b>Advise</b> the business on market segmentation.</li> <li>● <b>Guide</b> the business to identify market opportunities.</li> <li>● <b>Assess</b> at least two different approaches for validating assumptions and guide the client in the appropriate use of them.</li> </ul> <p><b>Purpose &amp; Strategy</b></p> <ul style="list-style-type: none"> <li>● <b>Facilitate</b> product kickoffs in almost any situation engaging multiple customers, stakeholders, leadership, and team members.</li> </ul>

	<ul style="list-style-type: none"> <li>● <b>Advise</b> an organization on developing a business vision and strategy.</li> <li>● <b>Guide</b> the business to decide which initiatives to invest in, to create a shared understanding of value creation across the organization.</li> </ul> <p><b>Managing the Backlog</b></p> <ul style="list-style-type: none"> <li>● <b>Advise</b> the organization on how to prioritize demand across the business.</li> <li>● <b>Facilitate</b> an initiative from concept through to value recognition.</li> <li>● <b>Change</b> the focus on initial success to be outcome-focused (economic, social, and environmental value).</li> </ul> <p><b>Supporting Business Stakeholders</b></p> <ul style="list-style-type: none"> <li>● <b>Respect</b> any previous coaching done with business stakeholders and use this to continually improve how to serve others.</li> <li>● <b>Guide</b> a product community in their growth.</li> <li>● <b>Teach</b> business stakeholders Agile and Lean concepts so they can bring the right products to the market at the right time.</li> </ul>
<p><b>5 Catalyst</b></p>	<ul style="list-style-type: none"> <li>● Seen as a Leader in the community on topics such as <ul style="list-style-type: none"> <li>○ Understanding Customers</li> <li>○ Purpose &amp; Strategy</li> <li>○ Managing the Backlog</li> <li>○ Coaching Business Stakeholders</li> </ul> </li> <li>● Speaks at conferences and other community events on product and business-related topics.</li> <li>● Contributes new thinking to the community relating to product and business matters.</li> <li>● Inspiring others on the need for organizations to exist beyond traditional economic value.</li> </ul>

**Serving the Team**

A team is more than a collection of individuals, it is a human system with its own characteristics, needs and growth potential. Moments of conflict or collaboration difficulty should be seen as human systems dynamics, rather than solely personal to the individuals involved.



You help teams become the best they can be using the core competencies you have already covered. This section covers a more focused view of specifically serving the team through a journey to high performance. This is done with knowledge and skills, that serves the team including things such as:

- **Team effectiveness** - Is the capacity of a team to accomplish its shared outcome based goals and objectives.
- **Team dynamics** - The behavioral relationships of both the conscious and unconscious forces that influence the direction of a team. This includes how the team communicates, their capacity for self-management, accountability, transparency, conflict navigation, emotions and how they embrace diversity.
- **Launching a Team** - Studies show (Hackman, 2011) that 90% of variation in team effectiveness is due to team design (60%) and team launch (30%), so the start is really important. This should include elements such as helping the team get to know one another, create a culture, align on a vision, setting up their work environment and establishing team agreements and/or ground rules.

### Competency Level Definitions:

Level	Reflection
<p><b>1</b> <b>Beginner</b></p>	<p><b>Team Effectiveness</b></p> <ul style="list-style-type: none"> <li>● <b>List</b> at least three attributes of effective teams</li> <li>● <b>Describe</b> at least three different challenges facing a self-managing team.</li> <li>● <b>Describe</b> the importance of creating a continuous learning culture in a team.</li> </ul> <p><b>Team Dynamics</b></p> <ul style="list-style-type: none"> <li>● <b>Identify</b> the advantages of diversity within the team (i.e. different perspectives, experiences, and viewpoints).</li> <li>● <b>Understand</b> the importance of conflict in a team.</li> </ul> <p><b>Launching Teams</b></p> <ul style="list-style-type: none"> <li>● <b>Understand</b> how starting an agile team is different from kicking off a traditional project.</li> <li>● <b>Identify</b> characteristics of a successful team launch.</li> </ul>

<p><b>2</b> <b>Advanced Beginner</b></p>	<p><b>Team Effectiveness</b></p> <ul style="list-style-type: none"> <li>• <b>Discuss</b> three different ways the organization (culture, leadership, policies, structures etc.) can impact team effectiveness.</li> <li>• <b>Describe</b> at least three characteristics of a high-performing team and how those characteristics relate to an agile mindset.</li> <li>• <b>Discuss</b> at least three typical impediments for a team and describe at least one way to address them.</li> </ul> <p><b>Team Dynamics</b></p> <ul style="list-style-type: none"> <li>• <b>Describe</b> when a constructive interaction moves to destructive conflict.</li> <li>• <b>Apply</b> at least two techniques to foster greater self-management within teams.</li> <li>• <b>Explain</b> at least one multi-stage model for team formation and development. Illustrates what is important for a new team.</li> </ul> <p><b>Launch a Team</b></p> <ul style="list-style-type: none"> <li>• <b>Facilitate</b> creation of team purpose, roles, agreements and alignment during the start-up of a team.</li> </ul>
<p><b>3</b> <b>Practitioner</b></p>	<p><b>Team Effectiveness</b></p> <ul style="list-style-type: none"> <li>• <b>Describe</b> how you can help a team overcome at least three challenges to be more effective.</li> <li>• <b>Analyze</b> at least two ways in which you have evolved the culture of a team.</li> <li>• <b>Appraise</b> at least two models or techniques for team development and improving team effectiveness.</li> </ul> <p><b>Team Dynamics</b></p> <ul style="list-style-type: none"> <li>• <b>Surface</b> conflict in a positive manner to improve the team's competency in dealing with conflict.</li> <li>• <b>Apply</b> at least three techniques for addressing team dysfunctions in different teams.</li> <li>• <b>Describe</b> how teams are unique and will require different approaches to how they work and will need to be coached differently.</li> </ul> <p><b>Launching a Team</b></p> <ul style="list-style-type: none"> <li>• <b>Assess</b> and then <b>address</b> missing skills or capabilities within a team that will take it towards high performance and business agility.</li> </ul>

	<ul style="list-style-type: none"> <li>● <b>Integrate</b> learnings from other teams and take a whole system approach to the launch of a new Agile team, starting with - good enough for now.</li> <li>● <b>Facilitate</b> the launch of a new Agile team and explain the learnings from the experience.</li> </ul>
<p><b>4</b> <b>Guide</b></p>	<p><b>Team Effectiveness</b></p> <ul style="list-style-type: none"> <li>● <b>Integrate</b> different team models and demonstrate how you have used these to increase the team's outcomes.</li> <li>● <b>Contrast</b> different techniques used to increase team effectiveness across multiple teams with who you have worked and evaluate the effects on team results.</li> <li>● <b>Teach</b> teams how to self-adapt, without the need for a coach.</li> </ul> <p><b>Team Dynamics</b></p> <ul style="list-style-type: none"> <li>● <b>Contrast</b> the different relationships across teams with who you have worked, and integrate learning into your coaching interventions.</li> </ul> <p><b>Launching a Team</b></p> <ul style="list-style-type: none"> <li>● <b>Apply</b> a coaching approach to the formation and development of teams and the challenges commonly encountered while introducing Agile.</li> <li>● <b>Guide</b> an organization in changing the environment in order to provide the best possible start to a team.</li> <li>● <b>Support</b> an organization in articulating a clear vision and goals that can support teams.</li> </ul>
<p><b>5</b> <b>Catalyst</b></p>	<ul style="list-style-type: none"> <li>● Seen as a Leader in the community on topics such as <ul style="list-style-type: none"> <li>○ Team Effectiveness</li> <li>○ Team Dynamics</li> <li>○ Launching Teams</li> </ul> </li> <li>● Speaks at conferences and other community events on team related topics.</li> <li>● Contributes new thinking to the community relating to teams.</li> </ul>

## Coaching

Coaching is partnering with a person, team, or organization (client) in a creative process to help the client to reach their goals by unlocking their own potential and understanding. A coach is able to accept the client as a whole, creative, and competent person, and serve their agenda ethically.

There are many different definitions of coaching, for example Whitmore, J. (1992), simply states: “Coaching is unlocking a person’s potential to maximize their own performance. It is helping them to learn rather than teaching them.” When working with an individual or system we are helping them move forward in some way, helping them grow. Coaching people and systems are professions in their own right, and we encourage you to dig deeper into coaching, as a profession, using the links provided in the resource section. There are professional bodies, such as the International Coaching Federation (ICF) and European Mentoring and Coaching Council (EMCC), which support the overall principles of professional coaching.

Someone using Agile Coaching practices needs a strong foundation in coaching as the client often needs someone to create a constructive space in which they can broaden and deepen their thinking to where they need to go. An important aspect of using coaching practices is to understand when/when not to use a coaching approach.

### Coaching Mindset

Being a Coach, you will have the beliefs, values and attitudes that allow you to take a coaching stance and work effectively with both individuals and systems. It can be difficult for beginners to enter a coaching stance as you must often let go of skills and behaviors that have made you an expert. Below is a list of some attitudes and beliefs that a great coach will hold when taking a coaching stance:

- **Coachee Focus** - Develop and maintain a mindset that is authentic, open, curious, flexible and honoring the clients agenda.
  - **Authenticity** - You behave in an ethical way and have a strong belief and values system that holds the client in a non-judgemental and safe space.
  - **Learning** - You recognise that learning is an important part of the development process as a coach.
  - **Enabling** - You develop their own skills to enable the client to learn and gain insight.

- **Belief in the Client** - the client is capable and whole and growth is possible. Clients are capable of achieving their own goals, and not in need of “fixing”.
  - **Neutrality** - You respect the client's perspective and their needs without judgment. You do not influence, and instead hold the clients agenda. You reduce client dependence, work to enable the client to move forward independently.
  - **Adaptability** - You are willing to let go of judgment and adapt to what the client needs in the moment.
  - **Learning** - You believe that others learn best for themselves. People are naturally resourceful and whole with unlimited potential. They come to work to do the best they can and do not need rescuing from the decisions they make.

**Competency Level Definitions:**

Level	Reflection
<b>1</b> <b>Beginner</b>	<p><b>Coachee Focus</b></p> <ul style="list-style-type: none"> <li>● <b>Define</b> what coaching ethics means to them.</li> <li>● <b>Explain</b> what Physiological safety is and why it is important.</li> <li>● <b>Recognize</b> the power of coaching and the impact of coaching for themselves.</li> </ul> <p><b>Belief in the Client</b></p> <ul style="list-style-type: none"> <li>● <b>Recognize</b> that growth is possible and people are naturally creative, resourceful, whole and have unlimited potential.</li> <li>● <b>Recognize</b> that a coaching conversation is for the purpose of helping a client deepen/broaden their thinking and to enable growth.</li> <li>● <b>Understand</b> the importance of the client leading the direction of the conversation.</li> </ul>
<b>2</b> <b>Advanced Beginner</b>	<p><b>Coachee Focus</b></p> <ul style="list-style-type: none"> <li>● <b>Apply</b> coaching ethics when coaching.</li> <li>● <b>Demonstrate</b> the power of coaching by having regular coaching yourself.</li> <li>● <b>Able</b> to let the client set the agenda.</li> </ul> <p><b>Belief in the Client</b></p>

	<ul style="list-style-type: none"> <li>● <b>Able</b> to focus on the clients agenda, believe that your clients are naturally creative, resourceful, whole and have unlimited potential. Therefore, they have the means to solve their own challenges.</li> <li>● <b>Able</b> to help the client create opportunities for learning and for taking new actions. Helps them explore alternatives, promotes experimentation and self-discovery, celebrates successes and capabilities, helps “do it now”.</li> </ul>
<b>3 Practitioner</b>	<p><b>Coachee Focus</b></p> <ul style="list-style-type: none"> <li>● <b>Apply</b> coaching ethics as part of their everyday life.</li> <li>● <b>Demonstrate</b> the power of coaching by having regular coaching supervision or peer support.</li> <li>● <b>Able</b> to suspend judgment in regards to the clients perspective and their needs.</li> </ul> <p><b>Belief in the Client</b></p> <ul style="list-style-type: none"> <li>● <b>Model</b> unconditional positive regard, assume positive intent, people are always doing the best they can.</li> <li>● <b>Demonstrate</b> the ability to help clients to believe in their potential and ability to change.</li> <li>● <b>Able</b> to enable the client to move forward independently.</li> </ul>
<b>4 Guide</b>	<ul style="list-style-type: none"> <li>● Guide level guidance will be provided in a future update.</li> </ul>
<b>5 Catalyst</b>	<ul style="list-style-type: none"> <li>● Catalyst level guidance will be provided in a future update.</li> </ul>

**Coaching Skills**

To be a successful coach is more than just adopting the right mindset. Coaching models leverage specific skills and capabilities that allow the coach to help the client deepen their thinking to where they need to go. Coaching skills are foundational techniques that you as a Coach can apply regardless of if you are working with an individual, a team, or an organization.

There are a number of different approaches to one on one coaching, each of which may contain different models, practices, and tools that can help a coach given different contexts. Whichever tools a coach uses, they must co-create an effective relationship with the client and leverage their communication skills to cultivate learning and growth.

Coaching Systems looks at skills associated with coaching beyond individuals working with groups and relationships. There are a number of different approaches to coaching systems, each of which may contain different models, practices, and tools that can help a coach in the context of a system.

Both are included in the following areas:

- **Co-creates the Relationship**
  - Cultivates Trust and Safety - You partner with the client (individual or system) to create a safe, supportive and confidential environment that allows the client to share freely. You maintain a relationship of mutual respect and trust.
  - Maintains Presence - You are fully conscious and present with the client, employing a style that is open, flexible, grounded and confident.
  - Promote psychological safety - You create and maintain an environment of trust where people can share thoughts openly and thinking can be challenged.
- **Communication Skills**
  - Listens actively - You focus on what the client/system is and is not saying to fully understand what is being communicated.
  - Evokes awareness - You facilitate client insight and learning by using tools and techniques such as powerful questioning, silence, or metaphor.
- **Tools, Techniques and Approaches** - You are aware of a number of Tools, Techniques and Approaches and know when to apply them in service of the client.

**Competency Level Definitions:**

Level	Reflection
<b>1 Beginner</b>	<p><b>Co-creates the Relationship</b></p> <ul style="list-style-type: none"> <li>● <b>Understand</b> the importance of a coaching contract, and what it should contain. (e.g. role of the coach, duration, expectations, feedback, responsibilities).</li> </ul>

	<ul style="list-style-type: none"> <li>● <b>Recognize</b> confidentiality as a basis for the coaching conversation.</li> </ul> <p><b>Communication Skills</b></p> <ul style="list-style-type: none"> <li>● <b>Understand</b> the importance that listening plays in good communication.</li> </ul> <p><b>Tools, Techniques and Approaches</b></p> <ul style="list-style-type: none"> <li>● <b>Explain</b> at least one coaching tool/technique and be aware of the benefits.</li> <li>● <b>Understand</b> the importance of using powerful questions and silence to create space for client thinking and expression.</li> </ul>
<p><b>2</b> <b>Advanced</b> <b>Beginner</b></p>	<p><b>Co-creates the Relationship</b></p> <ul style="list-style-type: none"> <li>● <b>Practice</b> partnering with individuals and (the) systems to develop, maintain, and reflect on agreements and goals.</li> <li>● <b>Explain</b> how you can encourage individuals and system members to pause and reflect on how they are interacting and behaving in the coaching sessions.</li> <li>● <b>Able</b> to formulate a basic coaching agreement and contract.</li> </ul> <p><b>Communication Skills</b></p> <ul style="list-style-type: none"> <li>● <b>Explain</b> how to challenge the individuals' and systems' assumptions, behaviors, and mindset, to enhance their collective awareness and insight.</li> <li>● <b>Recognize</b> a situation in which you would intervene to reorient the conversation and your reasoning to intervene.</li> <li>● <b>Able</b> to actively listen, without trying to solve the clients problem some of the time.</li> </ul> <p><b>Tools, Techniques and Approaches</b></p> <ul style="list-style-type: none"> <li>● <b>Apply</b> at least three coaching techniques and describe how the coaching technique impacted each interaction.</li> <li>● <b>Ask</b> powerful questions for maximum impact, that evoke discovery and insight, challenge assumptions, are open-ended, forward-looking and pre-supposing success.</li> <li>● <b>Apply</b> two or more tools or techniques to support psychological safety in a one on one coaching session</li> </ul>



<p><b>3 Practitioner</b></p>	<p><b>Co-creates the Relationship</b></p> <ul style="list-style-type: none"> <li>● <b>Contrast</b> at least 2 methods to develop, maintain, and reflect on agreements and goals with individuals and (the) system(s).</li> <li>● <b>Practice</b> intervening in the conversation to reorient it and reflect on which interventions were appropriate.</li> <li>● <b>Practice</b> encouraging individuals and system members to pause and reflect on how they are interacting and behaving in the coaching sessions.</li> </ul> <p><b>Communication Skills</b></p> <ul style="list-style-type: none"> <li>● <b>Practice</b> at least 3 ways to encourage individuals and the system to own the dialogue.</li> <li>● <b>Demonstrate</b> a situation where you intervened to reorient the conversation and your reasoning.</li> <li>● <b>Able</b> to actively listen, reflect and mirror body language, words, tone and energy.</li> </ul> <p><b>Tools, Techniques and Approaches</b></p> <ul style="list-style-type: none"> <li>● <b>Compare</b> coaching approaches and how they best serve the client.</li> <li>● <b>Analyze</b> three coaching tools and how they can be used to help a team grow, explain how you have used one of the tools in the past.</li> <li>● <b>Apply</b> two or more tools or techniques to support psychological safety in a systemic coaching session.</li> </ul>
<p><b>4 Guide</b></p>	<ul style="list-style-type: none"> <li>● Guide level guidance will be provided in a future update.</li> </ul>
<p><b>5 Catalyst</b></p>	<ul style="list-style-type: none"> <li>● Catalyst level guidance will be provided in a future update.</li> </ul>

## Facilitating

Facilitating a group increases the effectiveness of people to align in a collaborative way, to interpret their context, and mutually identify the most valuable outcomes desired. A

facilitator has the skills to create a neutral environment of openness, safety, and innovation in a group setting.

*“Facilitation is the practical neutral craft (an informed blend of techniques and insights) of creating environments of openness, safety and innovation” (Turner, 2012).*

*“A facilitator is an individual who uses self-awareness, self-management, group awareness, and group process to enable teams to access their collective intelligence in order to achieve their desired outcomes” (Acker, 2020).* In other words self-mastery is as important if not more so than the tools and techniques.

Someone using Agile Coaching practices needs a strong foundation in Facilitation as the client often needs someone to create a constructive space in which they can broaden and deepen their thinking to where they need to go.

## **Facilitation Mindset**

Being a Facilitator you maintain neutrality of the content being discussed, create a collaborative space, and encourage full participation of all members of the group.

- **Group Focus** - Develop and maintain a mindset that is open, curious, flexible, and honors the group's agenda. Demonstrate collaborative values and remain present for the group. The processes you create in
  - **Authenticity** - You behave in an ethical way and have a strong belief and values system that holds the group in a non-judgemental and safe space.
  - **Learning** - You recognise that learning is an important part of becoming a better facilitator
  - **Enabling** - You develop your own skills to enable the group to learn and gain insight.
  
- **Believe in the group** -The group is creative, resourceful and whole and, with the right focus, has the answers to meet the outcome for themselves without external support.
  - **Neutrality** - You respect the perspective of each person in the group and their needs without judgment.
  - **Adaptability** - You hold the outcome and are able to adapt to what the group needs in the moment in order to meet the agreed outcome
  - **Learning** - You believe that others learn best for themselves. The group is naturally resourceful and whole with unlimited potential. The group learns from its mistakes and becomes stronger. No rescuing is required.

## Competency Level Definitions:

Level	Reflection
<p><b>1</b> <b>Beginner</b></p>	<p><b>Group Focus</b></p> <ul style="list-style-type: none"> <li>● <b>Discuss</b> how a Facilitator maintains psychological safety, trust, transparency, and clarity throughout the engagement with the group.</li> <li>● <b>Identify</b> when a Facilitation stance is appropriate.</li> </ul> <p><b>Believe in the Group</b></p> <ul style="list-style-type: none"> <li>● <b>Describe</b> the importance of maintaining respect for people's opinions.</li> <li>● <b>Welcome</b> diverse opinions.</li> <li>● <b>Explain</b> why Facilitation is for the benefit of the group.</li> </ul>
<p><b>2</b> <b>Advanced Beginner</b></p>	<p><b>Group Focus</b></p> <ul style="list-style-type: none"> <li>● <b>Describe</b> your Facilitation stance and how it impacted the group.</li> <li>● <b>Reflect</b> as a facilitator and describe your impact on the group.</li> <li>● <b>Describe</b> how you remain ethical when facilitating.</li> </ul> <p><b>Believe in the Group</b></p> <ul style="list-style-type: none"> <li>● <b>Describe</b> why we don't set the outcome of a session we are facilitating.</li> <li>● <b>Explain</b> why remaining neutral is important.</li> <li>● <b>Articulate</b> the importance of the statement <i>"The group is naturally creative, resourceful, and whole, and therefore, they have the means to solve their own challenges and do not need to be fixed in any way."</i></li> </ul>
<p><b>3</b> <b>Practitioner</b></p>	<p><b>Group Focus</b></p> <ul style="list-style-type: none"> <li>● <b>Analyze</b> how you plan to improve your facilitation skills over the near future.</li> <li>● <b>Analyze</b> a session you facilitated and reflect on what went well and what would have worked better.</li> <li>● <b>Guide</b> the process for the group without leading their path and solutions.</li> </ul> <p><b>Believe in the Group</b></p> <ul style="list-style-type: none"> <li>● <b>Model</b> unconditional positive regard and always assume positive intent.</li> </ul>

	<ul style="list-style-type: none"> <li>● <b>Demonstrate</b> the ability to help groups believe in their potential and ability to change.</li> <li>● <b>Demonstrate</b> how you helped the group learn for themselves.</li> </ul>
<b>4 Guide</b>	<ul style="list-style-type: none"> <li>● Guide level guidance will be provided in a future update.</li> </ul>
<b>5 Catalyst</b>	<ul style="list-style-type: none"> <li>● Catalyst level guidance will be provided in a future update.</li> </ul>

## Facilitation Skills

Being a Facilitator you hold attention to what is important for the group, and leave responsibility *with them* for action. You help the group be accountable to what they say they will do and their plan. You will be skilled in working through a number of different group challenges.

## Multi-stakeholder contracting & relationship management

- **Develop Working Partnerships** - You partner with the client to agree on mutual commitment and develop consensus on tasks, deliverables, roles and responsibilities.
- **Design and Customize Sessions** - You co-create with the client to discover needs, establish roles, and create designs that will achieve intended outcomes.

## Participation & Outcomes

- **Support Group Process** - You create an appropriate environment, atmosphere and logistics to support the purpose of the session(s).
- **Deepen Group Awareness** - You set the stage to achieve outcomes. You evoke insights from the group, explore underlying issues and assist in reflection. You manage conflict by explaining its value; bring awareness and explore assumptions.
- **Focus on Outcomes** - You achieve group consensus with the ability to adapt according to the group's needs to meet the agreed outcome within the timebox.

## Tools & Techniques

- **Establish an Approach** - You use a variety of techniques that foster open participation considering client culture, diversity and participants who have different approaches to learning and ways of processing information.
- **Inspire Group Creativity** - You draw out participants with various approaches to learning and ways of processing information. Encourage creative thinking and stimulate group energy.

**Competency Level Definitions:**

Level	Reflection
<p><b>1</b> <b>Beginner</b></p>	<p><b>Multi-stakeholder contracting &amp; relationship management</b></p> <ul style="list-style-type: none"> <li>● <b>Identify</b> that managing multi-stakeholders relationships are more complicated than one to one interactions.</li> <li>● <b>Understand</b> the need to design and customize the facilitation sessions for each group.</li> </ul> <p><b>Participation &amp; Outcomes</b></p> <ul style="list-style-type: none"> <li>● <b>List</b> attributes of a group environment that will enable active participation.</li> <li>● <b>Explain</b> the need to achieve group consensus and the necessity to adapt according to the group’s needs.</li> <li>● <b>Identify</b> the outcome of a session.</li> </ul> <p><b>Tools &amp; Techniques</b></p> <ul style="list-style-type: none"> <li>● <b>Describe</b> a basic facilitation arc.</li> <li>● <b>List</b> a variety of tools and techniques that foster open participation.</li> <li>● <b>List</b> a variety of tools and techniques that encourage creative thinking and stimulate group energy.</li> </ul>

<p><b>2</b> <b>Advanced</b> <b>Beginner</b></p>	<p><b>Multi-stakeholder contracting &amp; relationship management</b></p> <ul style="list-style-type: none"> <li>● <b>Apply</b> a facilitation agreement with a stakeholder.</li> <li>● <b>Design</b> a basic facilitation plan that ensures engagement for all participants.</li> </ul> <p><b>Participation &amp; Outcomes</b></p> <ul style="list-style-type: none"> <li>● <b>Demonstrate</b> the ability to facilitate a session, that has active yet balanced participation for all group members.</li> <li>● <b>Demonstrate</b> facilitating a group to consensus.</li> <li>● <b>Able</b> to facilitate a group to an agreed outcome.</li> </ul> <p><b>Tools &amp; Techniques</b></p> <ul style="list-style-type: none"> <li>● <b>Demonstrate</b> the ability to follow a basic facilitation arc.</li> <li>● <b>Demonstrate</b> the use of a variety of tools and techniques that foster open participation.</li> <li>● <b>Demonstrate</b> the use of a variety of tools and techniques that encourage creative thinking and stimulate group energy.</li> </ul>
<p><b>3</b> <b>Practitioner</b></p>	<p><b>Multi-stakeholder contracting &amp; relationship management</b></p> <ul style="list-style-type: none"> <li>● <b>Apply</b> a facilitation agreement within a multi-stakeholder environment.</li> <li>● <b>Design</b> multiple linked sessions to meet an outcome.</li> <li>● <b>Design</b> sessions that consider group energy, participation and the agreed outcome.</li> </ul> <p><b>Participation &amp; Outcomes</b></p> <ul style="list-style-type: none"> <li>● <b>Demonstrate</b> the ability to facilitate conflict.</li> <li>● <b>Demonstrate</b> competency in adapting in the moment to challenges and opportunities that arise.</li> <li>● <b>Bring clarity</b> to a group's agenda and outcome, and ensures that everyone understands the resulting outcome and responsibilities.</li> </ul> <p><b>Tools &amp; Techniques</b></p> <ul style="list-style-type: none"> <li>● <b>Demonstrate</b> the ability to use multiple facilitation frameworks depending on the context of the session.</li> <li>● <b>Analyze</b> why you used a certain tool in any session and the impact it had on the group.</li> <li>● <b>Integrate</b> multiple tools and techniques in a way that encourages creative thinking and stimulates group energy.</li> </ul>

<b>4 Guide</b>	<ul style="list-style-type: none"> <li>● Guide level guidance will be provided in a future update.</li> </ul>
<b>5 Catalyst</b>	<ul style="list-style-type: none"> <li>● Catalyst level guidance will be provided in a future update.</li> </ul>

## Guiding Learning

Guiding learning is about effectively growing an individual, a group, or a team's skills and enabling them to be competent and resourceful. With this competency, you choose the most effective learning method to help the learner achieve their learning outcomes and inspire future learning.

Agile is all about learning, you will need to guide the learning of other people around you, helping them learn new skills and gain knowledge.

### Learning Mindset

Being a guide, you believe in the power of continuous learning and people's unbounded potential to change and grow as a result. There are certain attitudes and beliefs that you hold that underpin both your mentoring and training approach.

- **Growth**
  - Believe that all people can learn and grow, and that learning is a lifelong journey.
  - See the learner as creative, resourceful and whole; not needing to be fixed in any way.
  - Express curiosity: Be open to feedback and focus on continuous learning.
- **Environment**
  - Identify culture and adapt to meet the individuals and the organization *where they are*.
  - Cultivate an environment of trust, respect and safety - partner with the learners to create a psychologically safe and supportive environment that enables learning and encourages collaboration.
  - Create a learning environment that allows for experimentation and supports the learner's reflection.

- **Guiding**
  - Share experiences and knowledge with the intent of helping learners be the best they can be.
  - Maintain awareness of self, and listen to the learners needs.
  - Develop learner-driven content that is interactive and engaging, enabling a concrete connection to the concepts.
  - Validate learners' understanding of concepts and skills.

**Competency Level Definitions:**

Level	Reflection
<p><b>1</b> <b>Beginner</b></p>	<p><b>Growth</b></p> <ul style="list-style-type: none"> <li>● <b>Explain</b> how learning is a lifelong journey</li> <li>● <b>Discuss</b> the importance of feedback</li> </ul> <p><b>Environment</b></p> <ul style="list-style-type: none"> <li>● <b>Describe</b> how to cultivate an environment of trust respect and safety</li> </ul> <p><b>Guiding</b></p> <ul style="list-style-type: none"> <li>● <b>Discuss</b> how you can validate a learner's understanding of concepts and skills.</li> </ul>
<p><b>2</b> <b>Advanced Beginner</b></p>	<p><b>Growth</b></p> <ul style="list-style-type: none"> <li>● <b>Show</b> how feedback given well can be transformative.</li> <li>● <b>Apply</b> feedback received to improve your guiding skills.</li> </ul> <p><b>Environment</b></p> <ul style="list-style-type: none"> <li>● <b>Assess</b> the impact you are having on the learners.</li> <li>● <b>Create</b> a supporting environment for your learner(s).</li> </ul> <p><b>Guiding</b></p> <ul style="list-style-type: none"> <li>● <b>Develop</b> a workshop based on learner-driven content.</li> </ul>
<p><b>3</b> <b>Practitioner</b></p>	<p><b>Growth</b></p> <ul style="list-style-type: none"> <li>● <b>Design</b> an activity to help your learner distill their learning, so they know what they have learned.</li> <li>● <b>Analyze</b> three ways to help your learners grow professionally.</li> <li>● <b>Demonstrate</b> at least 3 methods to give and receive feedback with curiosity to drive continuous learning.</li> </ul> <p><b>Environment</b></p>



	<ul style="list-style-type: none"> <li>● <b>Create</b> a partnership with learners to create a psychologically safe environment to enable learning and encourage collaboration.</li> <li>● <b>Integrate</b> experimentation and reflection into your learning environment</li> <li>● <b>Modify</b> the environment based on organizational culture to meet your learners where they are</li> </ul> <p><b>Guiding</b></p> <ul style="list-style-type: none"> <li>● <b>Believe</b> in a learner's potential unconditionally.</li> <li>● <b>Create</b> and foster a learner-and-guide relationship based on mutual trust, respect and commitment.</li> <li>● <b>Explain</b> why entering a learning relationship requires compatibility with the learner to be successful.</li> </ul>
<b>4 Guide</b>	<ul style="list-style-type: none"> <li>● Guide level guidance will be provided in a future update.</li> </ul>
<b>5 Catalyst</b>	<ul style="list-style-type: none"> <li>● Catalyst level guidance will be provided in a future update.</li> </ul>

## Mentoring

Mentoring the creation of a “learning relationship between two (or more) individuals who share mutual responsibility and accountability for helping a mentee towards a clear and mutually defined learning goal. Learning is the fundamental process, purpose and product of mentoring”. (Zachary, 2005).

In a mentoring relationship, the mentor has experience in the area of growth, although both the mentor and mentee may learn from the interaction. Mentoring involves sharing with the mentee different approaches and acting as a guide down pathways commonly taken.

- **Mentee Focus** - Mentoring is a two-way relationship, where those involved make agreements to learn together.
  - Balancing between coaching and advising.
  - Exercises neutrality.
  - Holds the mentee's agenda.

- **Sharing Expertise** - Mentoring is generative and not directive. The mentee remains at choice as to whether to adopt a mentor's suggestions in any of the experiences the mentor shares. The Mentor...
  - Shares subject matter expertise in the areas of need to the mentee
  - Understands the boundaries of own expertise and when to seek other experts for the mentee
  - Shares experience by showing examples, storytelling, roleplay, giving feedback, and sharing resources/connections.
  - Checks resonance with the mentee.

**Competency Level Definitions:**

Level	Reflection
<b>1</b> <b>Beginner</b>	<p><b>Mentee Focus</b></p> <ul style="list-style-type: none"> <li>● <b>Describe</b> the opportunity for learning for both you the mentor and the mentee.</li> <li>● <b>Describe</b> the impact of clear goals on a mentoring relationship.</li> </ul> <p><b>Sharing Expertise</b></p> <ul style="list-style-type: none"> <li>● <b>Identify</b> if you are compatible with a mentor or mentee.</li> </ul>
<b>2</b> <b>Advanced Beginner</b>	<p><b>Mentee Focus</b></p> <ul style="list-style-type: none"> <li>● <b>Describe</b> three techniques to help an individual recognize areas of weakness and create positive change for themselves.</li> <li>● <b>Demonstrate</b> giving feedback in a way that encourages growth.</li> <li>● <b>Create</b> a mentee relationship that connects your experience to the needs of the mentee.</li> </ul> <p><b>Sharing Expertise</b></p> <ul style="list-style-type: none"> <li>● <b>Demonstrate</b> your ability to mentor a person or team.</li> <li>● <b>Support</b> your recommendation to the mentee using your expertise.</li> <li>● <b>Explain</b> how the scenario(s) you share relate to the problem for which the mentee is seeking guidance.</li> </ul>

Level	Reflection
<b>3 Practitioner</b>	<p><b>Mentee Focus</b></p> <ul style="list-style-type: none"> <li>● <b>Identify</b> the mentee's needs and adapt your approach appropriately.</li> <li>● <b>Evaluate</b> at least 3 factors that may contribute to your decision to stop mentoring</li> <li>● <b>Co-create</b> goals and create a shared purpose to guide your relationship.</li> </ul> <p><b>Sharing Expertise</b></p> <ul style="list-style-type: none"> <li>● <b>Illustrate</b> - through storytelling, examples and roleplay - the means to tackle similar problems.</li> <li>● <b>Appraise</b> the mentee's desire to make use of such information. If so, expound on any scenarios deemed valuable by the mentee.</li> <li>● <b>Modify</b> your approach to mentoring based on feedback and changes in the needs of the mentee.</li> </ul>
<b>4 Guide</b>	<ul style="list-style-type: none"> <li>● Guide level guidance will be provided in a future update.</li> </ul>
<b>5 Catalyst</b>	<ul style="list-style-type: none"> <li>● Catalyst level guidance will be provided in a future update.</li> </ul>

## Training

Being a Trainer, you will engage with learners to catalyze their understanding and application of knowledge, competence and skills. It could include logistics, design, content selection, delivery, assessment and reflection.

- **Learning Design**
  - Understands different learning styles and creates experiences so that the knowledge, competence and skills can be applied by all.
  - Designs a meaningful learning experience.
  - Develops learning journeys that are focused on the learner.
- **Delivery**
  - Adapts in the moment and fluidly shifts learning frames toward the needs of the learner.
  - Shares expertise and experiences through examples, storytelling, roleplay, giving feedback, and sharing resources/connections.

- Validate learning of concepts and application of skills beyond the course.

**Competency Level Definitions:**

Level	Reflection
<p><b>1</b> <b>Beginner</b></p>	<p><b>Learning Design</b></p> <ul style="list-style-type: none"> <li>● <b>Describe</b> training and approaches to adult learning.</li> <li>● <b>Evaluate</b> the learning needs of an individual or team.</li> </ul> <p><b>Delivery</b></p> <ul style="list-style-type: none"> <li>● <b>Explain</b> two or more ways that you can share knowledge with a group of people.</li> </ul>
<p><b>2</b> <b>Advanced Beginner</b></p>	<p><b>Learning Design</b></p> <ul style="list-style-type: none"> <li>● <b>Design</b> a learning experience using an appropriate training style.</li> <li>● <b>Develop</b> clear learning objectives, to create and execute training.</li> </ul> <p><b>Delivery</b></p> <ul style="list-style-type: none"> <li>● <b>Demonstrate</b> proficiency in delivering a half day training workshop on any Agile topic.</li> <li>● <b>Integrate</b> learning materials, to meet the needs and objectives of at least one training event.</li> </ul>
<p><b>3</b> <b>Practitioner</b></p>	<p><b>Learning Design</b></p> <ul style="list-style-type: none"> <li>● <b>Create</b> a suitable learning environment by using the physical space.</li> <li>● <b>Modify</b> learning design based on cultural context</li> <li>● <b>Design</b> a safe learning environment where students can engage and learn from each other.</li> <li>● <b>Develop</b> learning opportunities that engage participants who have different approaches to learning and ways of processing information</li> </ul> <p><b>Delivery</b></p> <ul style="list-style-type: none"> <li>● <b>Demonstrate</b> proficiency in delivering training using at least one of the teaching philosophies Alchemy, TBR (Training from the Back of the Room), Deep Learning, etc.</li> <li>● <b>Revise</b> your approach to training based on feedback.</li> <li>● <b>Integrate</b> effective storytelling into training to convey key concepts.</li> </ul>

	<ul style="list-style-type: none"> <li>● <b>Plan</b> for disruptive situations in training workshops.</li> </ul>
<b>4 Guide</b>	<ul style="list-style-type: none"> <li>● Guide level guidance will be provided in a future update.</li> </ul>
<b>5 Catalyst</b>	<ul style="list-style-type: none"> <li>● Catalyst level guidance will be provided in a future update.</li> </ul>

### Advising

As a trusted advisor you are invested in your client's success. By fostering a long-term, collaborative relationship with the client you can offer your experience, insights and observations to help them succeed with their goals.

As an advisor or consultant to a team, an individual, or within the wider organization, you are responsible for listening to what the client wants, providing reflection and challenge where necessary, then creating an environment that makes what they want achievable.

### Partnering

Setting up an engagement for success by creating shared responsibility as the client moves towards their goals. Fostering a collaborative relationship by making agreements with leaders, teams and individuals.

- **Align on Goals** - A common area of frustration and failure is when there are no goals agreed upon for the work to be undertaken. Consider, what is the purpose of the engagement? What will success look like and how will you know?  
Establishing clear goals builds focus and trust, allowing you to work collaboratively with others in support of those goals.
- **Create the Environment for Success** - Partner with the client and relevant stakeholders to create clear agreements about the nature of the relationship, including roles, processes, plans and reporting. Establishes agreements for the overall engagement. Organizations are complex systems. Any work should be carried out with appropriate inspection and adaptation points that allow the partners to adapt the work.

### **Competency Level Definitions:**

Competency levels for Partnering will be included in a future update of the Coaching Wheel.

### **Giving Advice**

As a trusted advisor sometimes what the client needs is for you to give advice. Your knowledge and experience is valuable to the client because the client may not be aware of what they don't know.

- **Storytelling** - Based on your own experience and that of others you humbly share stories of the people, the places and the conditions that led to new awarenesses and benefits. You do this in service to the client to inspire new thinking, to challenge inertia, and to unlock their potential.
- **Knowledge Sharing** - Referring to industry case studies, research and established bodies of knowledge.

### **Competency Level Definitions:**

Competency levels for Partnering will be included in a future update of the Coaching Wheel.

## **Leading**

Leading is about being the change you want to see to make the world a better place. As a leader, you are capable of catalyzing growth and inspiring others to realize the shared vision.

Leading recognizes that you need leadership skills in order to help grow teams and organizations using Agile principles and practices. It is built around a central notion of shared responsibility in leading. Partnering with other leaders, while taking shared responsibility on the journey towards the goal.

As a successful leader, you must move between a number of stances in the support of these concepts. You may be asked lead from the front as a visionary leader or to let your inner purpose serve as inspiration for others. At other times you will be asked to subsume yourself to the betterment of others, adopting a strong servant leadership stance. A successful leader is able to "dance in the moment", knowing when and how to move between these various stances.

## **Leading and Self-Mastery**

There are strong connections between the Leading and the Self-mastery. This is the concept that you model behavior, principles, values, and practices in your daily interactions. This extends into solid leadership behaviors when there is nobody around to observe them. That is, modeling them from the inside out is part of the essence of who you are as a Leader.

## **Visionary**

A visionary leader is co-creating a vision of the future that acts as a positive attractor or catalyst for incremental change. Change that is aligned to business agility, innovation, team health, and customer value delivery. You do this largely by assisting other leaders and organizations to dream of inspiring future states and helping them hone, share, and instantiate those dreams organizationally.

Beyond that, a visionary is also an evangelist and champion of agility within organizations (system) and in helping to guide their journey. Storytelling is an inherently important part of being a visionary, helping to connect the dots for everyone across the organization.

- **Purpose** - Aligning and connecting is creating an aligned organizational leadership team. This begins with aligning goals (OKR's, objectives, etc.) and then extends to more broadly affect behaviors and culture.
- **Inspiring** - Having the ability to personally weave powerful stories to illuminate an organization's vision. While also serving as a mentor and coach to organizational leaders to improve their abilities in communicating a compelling vision of the future. This also includes the creation of vision and mission statements that are co-created with the overall organization.
- **Empirical** - Nothing is fixed and everything emerges. Systems thinking on the part of the leader is an important part of it. As is, guiding yourself and organizational experiments, understanding, and emergence into new ways of thinking, leading, and working.

## **Competency Level Definitions:**

Competency levels for Partnering will be included in a future update of the Coaching Wheel.

## **Role Modeling**

Think of role modeling, in the simplest terms, as a leader walking their talk each day. For example, that means modeling their agile principles and values on a day-to-day basis, both personally and professionally.

There are two modes to role modeling. Modeling when the going is easy and modeling when the going is tough. Being resilient means that you aspire to be a consistent role model no matter what is going on around you.

Role modeling is also an extension of mentoring or showing what excellence looks like—showing instead of telling. This can be passively and actively showing what agile ways of leading look like.

There are four skills that come become crucial to master:

- **Personal (inside-out) Modeling** – This is the Self-Mastery aspect of role modeling . You are asking the question “Am I showing up as myself?” What does that look like? Ethics are also represented here, that is, are you showing up ethically according to common ethical standards for Agile Coaching? Are you continuously learning and growing as a leader?
- **Client (coaching presence) Modeling** – This is where the language you use as a coach really matters. For example, are you becoming more “Clean” in your use of language? Are you working hard to reduce your ego and biases? Are you aware of and are you refining your coaching presence? This skill is also closely connected to Self-Mastery and Coaching Mindset.
- **Community (visible persona) Modeling** – You are representing yourself in the wider agile community. You are modeling on a broader or more global scale via event participation, public speaking, writing, videos, or other avenues to model your experience to others.
- **Model Resilience** – this is where your ethics, values, and principles show up under pressure. The pressure here could be political, business, financial, or even internally-driven. Building your resilience over time is an important aspect of role modeling. Consider it the fitness test for your model.

### **Competency Level Definitions:**

Competency levels for Partnering will be included in a future update of the Coaching Wheel.

### **Leading for Growth**

Agile coaching skills are often used to help organizations grow. On the surface, this appears to be growing as an agile organization and encompasses standard frameworks (Scrum, Kanban, scaling, etc.). And to that end, there is a connection to the Agile/Lean Practitioner competency area. That is not the most challenging part of leading for growth.

The challenges are more cultural and organizational in nature. And this is where your organization or clients often struggle the most, because they have to:



1. Grow personally and internally
2. Grow and evolve their leadership teams
3. Grow and evolve their organizations

This involves successfully navigating their VUCA contexts while navigating and negotiating large-scale change. Given that, there is a strong connection between this competency area and the Transforming competency area.

There are skills that come become crucial to deepen your knowledge:

- **Building Team and Organizational Resilience** – Acknowledging and communicating that growth doesn't make any sense if it's not sticky or resilient for the long term. You need to work with your leadership clients to ensure that they're building team and organizational resilience. Self-care factors into that, as does mentoring and coaching their teams. Succession planning is something to focus our clients toward as an imperative.
- **Culture-Shaping** (Building, Shifting, Micro-steps) – You understand that culture isn't built in a big, mechanistic way. Instead, it's built (or shaped) by every behavior that leaders exhibit and reward/amplify or penalize or tolerate.
- **Diversity & Inclusion**: The ability to help your clients to create a safe culture where all voices are embraced and welcomed. Psychological Safety, coaching to develop more generational awareness, deep diversity awareness (including neurodiversity), and cultural awareness.
- **Learning Organization** – think of Peter Senge's The 5<sup>th</sup> Discipline – The Learning Organization here as the coach partners with your clients to establish a culture of continuous learning and growth. Practices here include Communities of Practice, Guilds, and Coaches of Coaches. Included with this is developing your coaching abilities at a systems level, systems thinking, and organizational system awareness.

### **Competency Level Definitions:**

Competency levels for Partnering will be included in a future update of the Coaching Wheel.

## **Transforming**

Transformation is a continuous activity that allows organizations to adapt and thrive in an ever-changing world, transforming is not just going from a current state to a new state. As a transformation agent you guide sustainable change that allows people to be more effective and learn how to change for themselves.

You will be familiar with organizational design concepts that will help client organizations achieve greater business agility.

## **Organizational Change**

Organizations are complex and changing them is an even more complex proposition. An empirical and informed approach to the change process improves the chances of success of a transformation. This approach may sometimes be talked about as a continuous journey or a process of organizational evolution.

Successfully helping an organization with change needs a certain level of emotional intelligence (see Self-Mastery) and skills in areas such as:

- **Introducing Change**
  - Context for change - Taking the current context & future possible context of Organizational Design and explaining the reasons we need/want to change or not change (for example if there is no appetite).
  - Complexity conscious - helping your client understand that organizations are complex in nature, so change should be empirical and people-driven rather than plan-driven.
  - Culture awareness - helping your client understand the culture of the organization so that they can introduce appropriate change.
- **Navigating Change**
  - Empirical change: establishing methods for transparency, inspection and adaptation
  - Facilitate change events & activities - from launching a single team to guiding a full organization redesign.
  - Ownership - Involving people impacted by the change in designing and implementing change.
  - Safe to fail experiments - establish a safe environment where the expectation is that some experiments will fail.
  - Working with organizational tensions to navigate change.
- **Sustaining Change**
  - Create sustainable change: aid the organization to learn how to create and navigate change on their own
  - Build internal capacity: Grow agile coaching capability in others
  - Help change go viral: help create an environment where positive change can spread
  - Learning culture: seek ways to help people build learning into to the way they work

- Deprecating ways of working and process: Remove those that no longer serve the people.

### Competency Level Definitions:

Level	Reflection
<b>1</b> <b>Beginner</b>	<p><b>Introducing Change</b></p> <ul style="list-style-type: none"> <li>● <b>List</b> at least three emerging global challenges and how each makes our world more complex, unpredictable and/or volatile.</li> <li>● <b>Illustrate</b> how a healthy agile approach supports the complexity and uncertainty of work.</li> <li>● <b>Describe</b> the nature of complex systems.</li> </ul> <p><b>Navigating Change</b></p> <ul style="list-style-type: none"> <li>● <b>Discuss</b> at least two ways to help the team with responding to impediments.</li> <li>● <b>Identify</b> at least three common organizational impediments outside the scope of a team that impacts effectiveness.</li> <li>● <b>Describe</b> how transparency, inspection and adaptation can support change.</li> </ul> <p><b>Sustaining Change</b></p> <ul style="list-style-type: none"> <li>● <b>Describe</b> the role continuous learning plays in sustaining change.</li> <li>● <b>Discuss</b> how introducing change will require organizations to stop or adapt existing ways of working.</li> </ul>
<b>2</b> <b>Advanced Beginner</b>	<p><b>Introducing Change</b></p> <ul style="list-style-type: none"> <li>● <b>Explain</b> the importance of discovering an organizational culture that supports shared accountability with teams.</li> <li>● <b>Explore</b> at least one tool or technique to identify, understand and influence the culture within an organization.</li> <li>● <b>Explain</b> how to approach an organizational change in a complex system.</li> </ul> <p><b>Navigating Change</b></p> <ul style="list-style-type: none"> <li>● <b>Explain</b> the importance of taking a systemic view, helping stakeholders understand the whole system.</li> </ul>

	<ul style="list-style-type: none"> <li>● <b>Demonstrate</b> how an effective approach to change should be flexible and adaptive to different situations.</li> <li>● <b>Apply</b> at least two techniques to effect change outside of the team in order to help them be more productive.</li> <li>● <b>Experiment</b> with at least one large-scale, participatory meeting format to facilitate/kick-off people-driven change.</li> </ul> <p><b>Sustaining Change</b></p> <ul style="list-style-type: none"> <li>● <b>Explain</b> the role building capability in people has on transformation sustainability.</li> <li>● <b>Discuss</b> how to foster the courage in leaders on all levels to continue change.</li> <li>● <b>Describe</b> a learning culture.</li> </ul>
<p><b>3 Practitioner</b></p>	<p><b>Introducing Change</b></p> <ul style="list-style-type: none"> <li>● <b>Analyze</b> how change might be approached differently based on existing organizational culture, and the influence that culture has on speed, risk, and receptiveness to change.</li> <li>● <b>Analyze</b> how change might be approached differently based on the system's complexity.</li> <li>● <b>Facilitate</b> a clear understanding of an organization's unique and compelling reasons for being agile.</li> </ul> <p><b>Navigating Change</b></p> <ul style="list-style-type: none"> <li>● <b>Describe</b> how organizational change impacts people and list three benefits of involving them in the change process.</li> <li>● <b>Compare</b> at least two systematic methods for helping organizations improve.</li> <li>● <b>Analyze</b> your approach to a complex intervention that addresses the root cause(s) of an organizational dysfunction.</li> <li>● <b>Demonstrate</b> at least two tangible examples of how you changed the culture of your team or organization.</li> <li>● <b>Coached</b> multiple groups to design/conduct people-driven change using large-scale, participatory meeting formats.</li> </ul> <p><b>Sustaining Change</b></p>

	<ul style="list-style-type: none"> <li>● <b>Discuss</b> transformation sustainability and give two approaches to developing organizational agile capabilities.</li> <li>● <b>Evaluate</b> an experience with supporting the work of multiple teams in an organization and make improvements.</li> <li>● <b>Grow</b> agile coaching capabilities in others, including transformation, some core skills and self-mastery.</li> </ul>
<b>4 Guide</b>	<ul style="list-style-type: none"> <li>● Guide level guidance will be provided in a future update.</li> </ul>
<b>5 Catalyst</b>	<ul style="list-style-type: none"> <li>● Catalyst level guidance will be provided in a future update.</li> </ul>

**Organizational Design**

As a transformation agent you grow knowledge that will support an organization's transformation to become a more adaptable, resilient, outcome-focused and people-centric organization. We do this by taking a system view, helping clients design experiments introducing them to new organizational principles and patterns. This affords your business the freedom and flexibility to achieve its purpose. No matter what the future brings.

- **Organizational Operating System** - knowledge of approaches that could help organizations better achieve their goals and support the culture you want to create:
  - Decision making - how power is shared and how decisions get made.
  - Structures, policies and metrics - how we organize ourselves and work together in a way resilience, adaptability, focusing on outcomes.
  - Innovation - how we learn and discover new ideas.
  - Roles and teams - how we take responsibility for getting work done.
- **Organize Around the Delivery of Value:** How an organization is designed for the delivery of value that is aligned with healthy decision making no matter the complexity of the organization.
- **People Advocacy** - organizations are made up of people and they are the center of everything we do.
  - Create policies that include all people and allow for diversity of thinking.
  - Advocate for people's growth, wellbeing, and create space for peoples self care.
  - Purpose - what's the change we want to see in the world, even beyond making money.
  - Motivation - ensuring that extrinsic and intrinsic factors of motivation are in balance and aligned to the organization's goals.

### Competency Level Definitions:

Level	Reflection
<b>1</b> <b>Beginner</b>	<p><b>Organizational Operating System</b></p> <ul style="list-style-type: none"> <li>● <b>Identify</b> at least three challenges an organization might face when undertaking an agile approach beyond a single team.</li> <li>● <b>Describe</b> the characteristics organizations need to develop to be able to face today's world and market challenges.</li> </ul> <p><b>Organize Around the Delivery of Value</b></p> <ul style="list-style-type: none"> <li>● <b>Describe</b> how the agile principles change an organization's approach to delivering value.</li> <li>● <b>Describe</b> what is valuable, recognizing that there are different types.</li> </ul> <p><b>People Advocacy</b></p> <ul style="list-style-type: none"> <li>● <b>List</b> at least three ways that traditional management changes in the Agile workplace.</li> </ul>

	<ul style="list-style-type: none"> <li>● <b>Describe</b> the value of having a clear and compelling vision.</li> <li>● <b>Describe</b> intrinsic motivation and why it is important.</li> </ul>
<p><b>2</b> <b>Advanced</b> <b>Beginner</b></p>	<p><b>Organizational Operating System</b></p> <ul style="list-style-type: none"> <li>● <b>Explain</b> how culture and the way value is interpreted are related, and how that relationship will affect organizational outcomes.</li> <li>● <b>Guide</b> understanding of at least three benefits and drawbacks of feature teams and component teams.</li> <li>● <b>Explain</b> how an organization's structures, policies and measures impact its culture.</li> </ul> <p><b>Organize Around the Delivery of Value</b></p> <ul style="list-style-type: none"> <li>● <b>Facilitate</b> at least three techniques for visualizing, managing, or reducing dependencies between teams.</li> <li>● <b>Describe</b> at least three challenges to creating value flow when applying agile approaches across an organizational system.</li> <li>● <b>Teach</b> three ways to help a team align their goals with those of the organization.</li> </ul> <p><b>People Advocacy</b></p> <ul style="list-style-type: none"> <li>● <b>Apply</b> at least two patterns for increasing trust and collaboration between multiple teams.</li> <li>● <b>Identify</b> at least three organizational practices that increase people's autonomy.</li> <li>● <b>Teach</b> the value of investing in people's growth over just training them to do a job.</li> </ul>

<p><b>3 Practitioner</b></p>	<p><b>Organizational Operating System</b></p> <ul style="list-style-type: none"> <li>● <b>Experiment</b> with at least three techniques to improve inter-team collaboration.</li> <li>● <b>Apply</b> scaling practices and methods that can be helpful without adding the overhead of an entire scaling framework when necessary.</li> <li>● <b>Assess</b> organizational structures, policies and metrics, describe how they impact organization culture and create value.</li> </ul> <p><b>Organize Around the Delivery of Value</b></p> <ul style="list-style-type: none"> <li>● <b>Describe</b> an organizational design that enables multiple teams to work on the same product.</li> <li>● <b>Contrast</b> at least two patterns for applying Product Ownership across multiple teams.</li> <li>● <b>Facilitate</b> growth of understanding as to what is value and what are products.</li> </ul> <p><b>People Advocacy</b></p> <ul style="list-style-type: none"> <li>● <b>Facilitate</b> and nurture the growth of people.</li> <li>● <b>Apply</b> practices that give agency to people and teams.</li> <li>● <b>Facilitate</b> the movement of decision making away from management towards the people involved in the work.</li> </ul>
<p><b>4 Guide</b></p>	<ul style="list-style-type: none"> <li>● Guide level guidance will be provided in a future update.</li> </ul>
<p><b>5 Catalyst</b></p>	<ul style="list-style-type: none"> <li>● Catalyst level guidance will be provided in a future update.</li> </ul>

**Domain Knowledge (the outside ring)**

The domain knowledge areas around the outside of the Wheel represent supporting expertise that may better help you serve the client and build trust with the team or organization. However, there is a risk: the more domain experience you have, the harder it will be to remain objective in your coaching. Therefore, it may be valid for a coach to allow a reduction of expertise in some areas (i.e., choosing not to stay up-to-date with the latest changes in technology) while seeking to increase knowledge in other areas.



While crafting the Wheel, we debated for a long time whether things like engineering practices and technical excellence should be represented under Knowing the Team. We specifically chose not to write about these things—e. However, knowledge of your team's technical practices conceptually live here on the wheel.

Similarly, you can consider things like Lean UX and Business Modeling part of Knowing the Business, and scaling frameworks and organizational change practices may be part of Knowing the Organization as you serve the organization.

Domain knowledge encompasses expertise in the work of the team, the business and the organization including (but not limited to):

## Knowing the Team

- Understanding current technical practices, and identifying practices that could be improved or adapted to increase agility.
- Technical understanding of the product a team is delivering or products across the organization.
- Growing relationships with the people in your team.

## Knowing the Business

- Understanding the marketplace in which business is being conducted.
- Understanding the needs and concerns of users, customers, and other business stakeholders.

## Knowing the Organization

- Knowledge of structures, policies, and operating models.
- Understanding relationships between people, teams, and departments.
- Understanding the organizational culture.

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