Agility in HR
Learning Outcomes

LICENSING INFORMATION

The work in this document was facilitated by the International Consortium for Agile (ICAgile) and done by the contribution of various Agile Experts and Practitioners. These Learning Outcomes are intended to help the growing Agile community worldwide.

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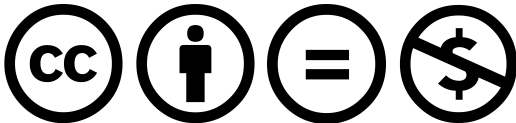
SPECIAL THANKS

ICAgile would like to thank the contributors to the Agility in HR
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FOREWORD

This certification is aimed at people who are in what most organizations call "HR," although we encourage them to move away from thinking of people as resources. We anticipate that they are part of an organization aiming to adopt agile thinking and practices, irrespective of the industry they are in. The idea is to give participants the knowledge they need to be able to tackle the changed way of thinking and working and adjust their people engagement practices to be more humanistic and values based.

The broad subject areas we have identified are:

- The Agile Mindset in HR

- Organization Design, Roles, Career Paths

- Performance, Goals & Motivation, Promotions

- Talent - Acquisition, Retention, Nurturing

- Incentive Structures (includes rewards, salaries & pay structures, and other things)

- Learning & Development

TARGET AUDIENCE

The target audience for this certification includes:

- Organization HR

  - Business partner/ workforce management - helping managers manage people

  - People development

  - "Resource" management (risk/legal)

  - Remuneration - incentives, rewards

  - Recruitment

  - People performance & goal setting

  - People engagement & motivation

- Organization Development consultants

- Transformation leads

  - Someone designated to explore the people & structural aspects of an agile transformation

- Managers
    - Line managers
    - Hiring managers
    - Resource pool "owners"

CHALLENGES WE HOPE THE CERTIFICATION CAN HELP ADDRESS

When exploring the challenges organizations face around talent we came up with the following as things we hope the certification will be able to help address:

- Attracting, hiring and retaining the right people
- Skill gaps
    - Identifying skill gaps and enabling growth at the individual & team level
    - People needing to take responsibility for their own growth and skills development
    - Keeping people's skills relevant to the changing business environment
- Embracing diversity without it being tokenism
- Keeping people motivated and engaged - every person is responsible for their own motivation & engagement; leadership & HR should provide prerequisites for engagement (the necessary environment, tools, models - how much relates to agile ways of working and the culture vs how much is related to the individual)
- Handling people who are not "team players" in a collaborative culture; what about people who do not believe in the agile values - what do we do with them, how much time and effort do we spend trying to cater to individuals who don't fit the mindset?   What if these are senior people? What do we do with the manager who don't believe in agile?
- Moving from individual performance mindset to team performance
- Moving from distributed to co-located & vice versa, virtual and distributed
- Business objective focused teams that are driven by KPI's/Measures/OKR's not individual goals
- Capacity (time & money) allocated for people to learn/rate of learning is in contradiction to the desire to be a learning organization
- Agility in mindset rather than in practices
- Moving from job-ladder to career-mosaic (portfolio careers); what is an agile career path?

- Job roles, job descriptions, titles - how do they change? Job architectures - roles, levels, competencies, gap analysis = move from closing the gaps to working with strengths

- Performance appraisals/ratings = how do we set salaries when we don't have performance ratings? What is the salary box for a person? What should impact your salary, should we have performance-related pay in agile organizations?

- Building T-shaped people / generalising specialists = also T-shaped teams

- The changing role of HR in agile businesses   - is the current relationship so tainted that HR is considered irrelevant? (Seen as order takers, administrators, compliance police)

- Cultural productivity / cultural agility - teams persist and the culture becomes self-sustaining even though the team members move on

- Succession planning in agile working - multidisciplinary teams and cross-functional people mitigate against this. Where do we draw the line?

- Which HR practices become redundant in an agile organization, and what replaces them

- Dealing with top management - what is their role, what is different for them, how can they use agile principles and tools in their work? Influencing change in their behaviours? Is it possible to have an agile organization when senior leadership doesn't live the values?

- What is an agile organization, what org structures,

- Too busy delivering and fire-fighting to have time to shift to growth mindset

- Frozen middle

- Lack of using scientifically proven approaches to motivate and empower people

- Aligning people performance measures with organization OKR/KPI/Goals

- (Where is the handoff between goal setting in the people area vs strategic goals - differs across organizations)

- There needs to be a common set of organization goals; how much should HR be involved in setting goals?

- Now that we're forming agile teams (cross functional) new challenges are emerging-
    - Real skill gaps - technical, business, agile, leadership
    - Recruiting is hard - lots of competition in the market

- Enabling self-organization and designing organizational structures which support effective teamwork

- Creating and nurturing an environment of psychological safety

Our goal is to enable the people people to be strategic partners and seen as a the nurturers of a creative culture. More successfully truly own culture in their organizations.

HOW TO READ THIS DOCUMENT

This document outlines the Learning Outcomes that must be addressed by accredited training organizations intending to offer ICAgile's Agility in HR certification.

Each LO follows a particular pattern, described below.

0.0.0. Learning Outcome Name

Additional Context, describing why this Learning Outcome is important or what it is intended to impart.

The Learning Outcome purpose, further describing what is expected to be imparted on the learner (e.g. a key point, framework, model, approach, technique, or skill).

LEARNING OUTCOMES

1. ORGANIZATIONAL DESIGN, ROLES & CAREER PATHS

1.1. DESIGNING FOR THE NEW WAY OF WORKING

1.1.1. Understanding Current Structures and Their Impact

Traditional hierarchical structures and matrixed organizations can significantly impede the flow of work, decisions and value.

Facilitate the participant's reflection and analysis of the impact organizational design has on organizational agility and present examples of alternative approaches.

1.1.2. Designing Teams and Teams of Teams

Organizations are shifting towards intact cross-functional stable teams to expedite the delivery of value. They need to design teams of teams to align value delivered with defined strategic business outcomes.

Introduce the participant to approaches for designing effective cross-functional teams along with the necessary structures around the teams to align their work to the value stream. This can contain elements that are pre-planned and it should also allow for emergent design in response to the dynamic, evolving situation around the team(s).

1.1.3. Aligning and Optimizing for Flow of Value

Traditional organizational structures align teams around functional silos, systems/technology or product/service offering. Future structures are designed to align around value streams that can adapt and respond quickly to customer and market needs.

Introduce strategies for aligning teams around value streams that can maximize flow, minimize dependencies and provide end-to-end delivery.

1.1.4. Supporting Development of Agile Leaders

In order for an agile transformation to succeed, leadership development in the organization must be aligned with agile value systems and cultivate an Agile mindset for business agility.

Explain that there are different leadership practices necessary when an organization adopts an agile approach and that leaders must be supported in adopting these practices.

1.2. ROLES

1.2.1. Redefining Roles & Expectations

Many traditional roles are impacted by the principles that guide how Agile organizations and teams work. It is vital to redefine roles, titles, levels, competencies and job descriptions to reflect the new expectations.

Introduce various aspects that will need to be redefined to bring clarity to new expectations.

1.2.2. Enabling Skill Development & Growth

With the shift in how we design teams and what we expect from roles, there are many skill gaps (technical, business, leadership, Agile, interpersonal) that have emerged and need to be addressed. There is also a high need for T-Shaped skills (depth in a specific skill and breadth in a few others).

Identify the many skill gaps that can occur and explain the intentional focus on growth that is necessary to address these gaps. Discuss ways to enable the growth of individuals with T-Shaped skills.

1.2.3. Embedding Agile/Lean Mindset and Core Values within Role Definition

Agile adoption and the move towards business agility is fundamentally based on a shift in mindset (an Agile mindset supports changing, adapting, kaizen thinking) and enabled by adoption of various practices. Without the mindset shift, the transformation will not be sustainable.

Highlight the importance and impact of modeling the Agile/lean mindset, core values and provide methods for embedding these expectations throughout a team member's journey.

1.3. CAREER PATHS

1.3.1. The Shortcomings of Traditional Career Paths

The traditional approach to creating well-defined job families with linear career path progression is less relevant today due to the dynamic and unpredictable landscape of organizations.

Explain why fixed career paths can pose obstacles in companies that aim to be adaptive and respond to changing business needs. Reflect on the behaviors these fixed paths have encouraged.

1.3.2. Modern Value-Based Journey Maps (Career Mosaic)

Modern dynamic and adaptive organizations require individuals to chart their own course and invest in learning new skills/roles that enable value delivery for their teams. People are likely to stay in organizations for shorter periods than was previously the case and their career paths span multiple organizations and areas within organizations.

Introduce the participant to a new way of thinking to evolve career paths from a linear fixed path to a dynamic purpose-driven journey that is directed by the individual themselves, while balancing the needs of the organization with the needs of the individual. Explain the link between capability and value creation as a factor in designing an individual's personal map.

2. LEARNING AND DEVELOPMENT

2.1. LEARNING CULTURE/LEARNING ORGANIZATION

2.1.1. Growth Mindset as an Enabler of Learning Cultures

Rapid and continual change in technology and ways of working mean that lifelong learning is critical. All roles need to have a component of learning built into their capacity and competencies. If the individual is not learning then they are stagnant, which, in our competitive markets, essentially equates to decaying.

Identify what it means to have a growth vs. fixed mindset and how a growth mindset helps create an environment that fosters continuous improvement and makes it safe to fail for the sake of learning.

2.1.2. Learner-Centered and Learner-Driven

A key element of evolving to a continuous learning culture is the shift from manager-driven and instructor-centered learning to learner-centered and learner-driven learning.

Differentiate learner-centered learning and learner-driven learning and explain why both are important to building a continuous learning culture and business agility.

2.1.3. Making Time to Learn

A learning culture is underpinned by encouragement, accommodation and support for learning by leadership and management.

Explain why it is important to ensure employees have the time they need to learn and how to plan for it. Consider ways to build slack into the system which gives permission and space to learn.

2.2. LEARNING MODALITIES

2.2.1. Industry, Peer and Team-Based Learning

With the pace of change and the need for "T-shaped" team members there is a need to build and leverage expertise within teams and the organization as a whole. Internal experts are able to provide valuable context and disseminate information rapidly in contrast to hiring an external trainer. There are a wide variety of mechanisms available to deliver learning on a just-in-time, on-demand basis.

Describe how instituting communities of practice enables teams to foster deeper learning within specific skills and disciplines. Also discuss when it is appropriate to leverage industry expertise through peer-based learning resources such as video-learning and webinars.

2.2.2. Adaptive Learning

People process information differently and, as such, respond to learning modalities differently depending on their learning preferences. Additionally, individuals are looking for just-in-time learning vs. point-in-time learning.

Convey the importance of providing a variety of learning modalities to address individual learning preferences. Also introduce the shift to self-paced and experiential modalities of learning that allow learners to learn key concepts and skills when and how they need to learn them (70/20/10 made real).

3. TALENT ACQUISITION

3.1. RECRUITING

3.1.1. Innovative Sourcing

It is important to "Think Differently" about how/where you source talent and operate with the mindset that "Everyone Owns Recruiting."

Introduce the potential power of being creative and deliberate in finding people. Explain the value of many types of diversity in organizations and how recruitment can change to bring people with a wide range of different viewpoints and backgrounds into the organization.

3.1.2. Power of the Practical Interview

Most companies do not effectively evaluate talent, and consequently end up making poor hiring decisions. Traditional interviewing techniques are prone to false positives during the interview process. Tests for both skills and fit to company culture and values should be used in screening processes.

Introduce interview methods that can reduce false positives and better evaluate for skills, potential and fit.

3.1.3. Candidate Experience

Agile values help keep user experience at the forefront. Candidates who have better recruitment experiences are more likely to accept employment offers. Most companies do not focus on every detail to ensure the best possible candidate experience.

Understanding what it takes to ensure the candidate experiences the "wow" factor.

3.2. ONBOARDING - THE WELCOME EXPERIENCE

3.2.1. Second Impressions

First impressions were already made during the interview process. Onboarding starts long before day 1 in the office, it starts when the candidate and the organization agree about a collaboration, and is not just for employees - it also applies to consultants, short-term engagements, etc.

Day 1+ is the company's opportunity to ensure there is continuity in overall impression of company (culture, values, experience).

Introduce the participant to concepts that ensure a seamless transition from candidate experience to employee experience.

3.2.2. Culture on Day 1

As your new hire assimilates to the organization, it is important that they have a clear understanding of the company's culture/values and how agile thinking is integral to how the company operates.

Review principles in agile thinking that would be important in creating the desired mindset on Day 1.

3.2.3. Enablement

Companies who assimilate their new hires quickly will see increased productivity and performance.

Introduce the participant to concepts that the company, HR team and manager can follow in order to enable new hires to be productive during the first 90 days.

4. ENABLING EFFECTIVE PERFORMANCE

4.1. PERFORMANCE

4.1.1. Learning Fast and Tolerating Failure

While feedback, learning loops and failure occur naturally in all business environments, complex environments amplify the rate at which failure happens and at which learning must happen for success.

Introduce the participant to the concepts of failure tolerance, the necessity of failing in order to learn and the impact on people's behavior. Learn the concepts of complex adaptive systems, specifically highlighting that failure is likely to happen at higher rates in a complex system.

4.1.2. Individual Performance Support

Agile environments value constant and continual feedback that support performance over formal individual performance evaluations.

Introduce techniques that create a safe environment for providing feedback. Highlight differences between a blame culture and trust culture. Explain the advantages of decoupling financial reward from individual performance.

4.1.3. Team Goals and Performance Support

Focus on achieving team goals increases alignment and reduces competition within teams. In Agile environments teams and value streams (as opposed to individuals) deliver business impact.

Introduce the participant to high-level concepts of systems thinking, the value of alignment and shared ownership within both teams and within a value stream. Differentiate between when individual goals should be utilized versus team goals.

4.1.4. System-Oriented Performance Assessment

The vast majority of performance in a value stream is attributable to the system within which individuals and teams work.

Introduce the participant to Deming's 95% systems thinking rule and the Theory of Constraints as it applies to a system. Define different types of ecosystems in businesses.

4.1.5. Enable Continuous Feedback

Performance is not an activity that you focus on once a year or even quarterly, but continuously.

Introduce techniques and tools for providing fast and continuous feedback at all levels and from multiple pathways (could include 360 Degree feedback).

4.1.6. Ownership-Driven Culture

Performance from a mindset of obligation (or lower) is significantly less than when a person chooses ownership. An ownership-focused culture is one where all individuals take it upon themselves to improve the overall system.

Introduce the differences among responsibility, ownership and accountability. Everyone is accountable for achieving their individual potential.

4.2. ENGAGING INTRINSIC MOTIVATION

4.2.1. Culture Driven by Intrinsic Motivation

There are a wide range of motivators that impact individual and team performance. In innovative organizations, contribution to a compelling vision and mission is often the most motivating factor.

Introduce the participant to the various types of motivators and the science behind why certain motivators (e.g., shared purpose) work better in a knowledge-work environment.

4.2.2. Uncover Motivators and Demotivators

With multiple motivation models available, it is most important to acknowledge individual motivation and its contribution to cultural health and productivity. Conversely, demotivation negatively impacts both the culture and the business.

Introduce the participant to patterns of successful and unsuccessful motivators. These can include behavioral, systems, team and leadership models.

4.2.3. Nurture an Environment of Self-Motivation

Cultures that empower people to know what motivates them and go after those things bring out the best in people.

Introduce tools and techniques that enable people to uncover and express their motivations/needs.

4.3. INCENTIVES ARE NOT ONLY FINANCIAL

4.3.1. Flexible Incentives

A one-size-fits-all approach to incentivizing people does not account for all of the various drivers and motivations they have.

Cover the various options to incentivizing people and teams.

4.3.2. Alternative Methods of Grouping/Categorization as a Step Towards Doing Away with Ranking Systems

Performance of individuals or teams rarely fits in a perfect bell curve; therefore, rigid incentives can cause otherwise high-performing groups to lose motivation.

Introduce alternative methods for categorizing performance and their advantages over stack ranking. Describe when ranking is not needed and how there are alternative methods for implementing incentive programs.

4.3.3. Fair and Meaningful Pay

More open and flexible pay structures and remuneration approaches are more aligned with Agile values.

Introduce options for more liberal remuneration strategies that support the cultural shifts needed to become an Agile organization.

5. THE AGILE MINDSET IN HR

5.1. APPLYING AGILE PRACTICES TO OPERATIONS AND INITIATIVES

5.1.1. Enabling Agility Throughout the Organization

HR should actively support the organization with principles, practices and guidelines that can support the teams to perform and be fulfilled by their work.

Introduce principles derived from the Agile manifesto and other value statements such as the Agile HR manifesto (http://www.agilehrmanifesto.org/) and the principles of business agility (http://theagiledirector.com/article/2017/05/25/domains-of-business-agility-v2/) and how to interpret these for the specific context. Explain tools to facilitate teamwork and performance in an agile context.

5.1.2. Coaching the People Aspects of the Organization

HR needs to inform and guide individuals, teams and managers when they get stuck or have people-related issues in the team.

Introduce topics such as knowing what motivates different people and conflict resolution. Explore why agile values are not "the truth" for everybody and what to do about resistance to agile.

5.1.3. Applying Agile Mindset and Practices to HR Initiatives and Operations

If HR wants to support and enable agility and agile practices throughout organizations, it should start by being an example for other areas of the business by using these ideas within HR.

Explain how an agile mindset is crucial within HR and how agile practices may be tailored for HR activities (be agile in your adoption of agile).

5.2. ENABLING AN AGILE MINDSET IN THE ENTERPRISE

5.2.1. Providing the Balance Between Culture and Structure

Creating a balanced organization is key to avoiding misinterpretations and conflicts between what is said and what is done.

Convey the importance of finding and maintaining the right balance between structure and culture.

Some structures undermine the cultural values of Agile (e.g., reward individual performance despite Agile's focus on team collaboration).

5.2.2. Supporting Transformation From a Mindset Perspective

Transforming an organization's mindset to be more Agile requires knowledge about how change happens and what the organizational values look like.

Explain that transformational change cannot be driven top-down and that the only real change happens when the workers themselves adopt an Agile Mindset. Also, understand why HR's role is so critical to support this transformation.

5.2.3. Creating a Safe Environment

Enabling psychological safety and inclusiveness across the organization is a key responsibility of the HR / talent organization.

Explain the role the talent organization has in ensuring a culture of psychological safety, inclusiveness and leadership that allow for people to feel safe speaking up - especially as we aim to empower teams and provide autonomy.

5.3. CORE FUNCTION

5.3.1. Shifting to People Enablement

In Agile organizations, the HR function shifts from a transactional focus to one of people enablement.

Convey what is expected of HR in an Agile organization in terms of enabling flexibility, collaboration, speed and adaptability rather than delivering programs, policies and strict rules.

5.3.2. Supporting Transformation From a Mindset Perspective

The HR function transitions to become a cross-functional group, integrated with the business and not a separate function. As a result, this breaks silos and HR value delivery becomes more distributed.

Illustrate ways to "slice" HR differently compared to the traditional functional silos and division into specialists and generalists. Instead, Agile organizations focus on T-shaped HR-people and embedding them on to cross-functional teams.