

# **A Real-World Roadmap** for Organizational Change

w/ Pete Oliver-Krueger



# Pete OK (Oliver-Krueger)

Agile -> Lean -> Teal Managing Consultant

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- B.S. in Electrical & Computer Engineering from Carnegie Mellon
- Co-designed the first online university
- Entrepreneur & DC Lean Startup Circle
- USA Today, Motley Fool, IRS, TD Ameritrade, InterAct Story Theatre



# The Problem

- **Three-in-one**
  - Profit-Based Business
  - Regulatory Agency
  - Not-for-profit advocacy group
- **Global Organization**
- **Large External Competitors,**  
including \*Google\*
- **Disrupted by Startups**

# Case Study



# Problems

Sound Familiar?

- Different Flavors of Agile, including “Agile doesn’t work here”
- Losing Customers
- Talking about layoffs
- Being disrupted - Startups (plus Google) moving in
- Most releases 6 months or more
- Re-architecting - Going on 2 years
- Little/No metrics
- 2 product lines; 1 API; 7 teams

# Challenges ~~Problems~~

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- ~~2 product lines; 1 API; 7 teams~~
- 7 product lines; 18+ teams

# The Plan

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- 1st Month - Product Line #1
  - Training
  - Coaching
- 2nd Month - Product Line #2
  - Training
  - Coaching Product #1 & Product #2
- 3rd Month - API Team
  - Training
  - Coaching Product #1, Product #2, & Product #3
- 4th Month - Onboard next product lines
  - etc...

# **“How are we doing?” – Executives**

# How are we being measured?



## ScrumMasters & Delivery Team

- Story \*Count\* **Velocity**
- **Predictability** (Actual Velocity vs Planned Velocity)
- Time to Close **Impediments** (lower)
- **Automated Code Coverage** (measured against Acceptance Criteria, not lines of code)

## Product/Strategy Team

- Definition of Ready, approved by delivery team (Y/N)
- 2 sprints worth of stories that meet the Definition of Ready
- $\geq$  3 months Roadmap of new features

# Agile Metrics



*But really...*

**“How are we doing?” – Executives**

*“How do we know we’re getting our money’s worth?”*

# Teal to the Rescue

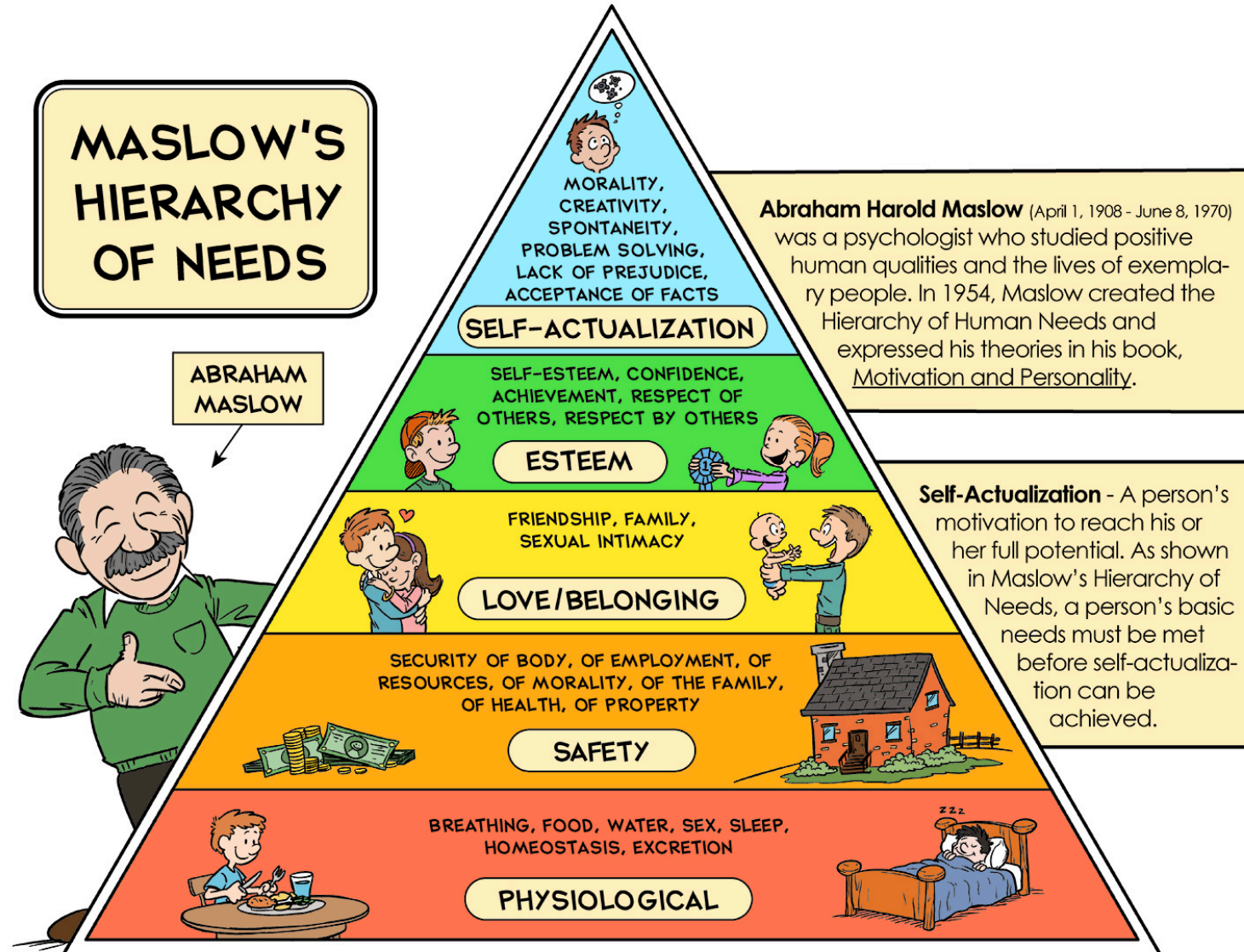
## What is Teal?

# Maslow's Hierarchy of Business Needs

- **Physiological** = Resources (e.g. Computers, tools, website, employees)
- **Safety** = Sales (e.g. consistent sales pipeline that you can rely on)
- **Belonging** = Culture (i.e. psychology)
- **Esteem** = Recognition
- **Self-Actualization** = Self-Management

You must satisfy lower needs before you can satisfy higher needs.

Example: Companies need a consistent pipeline of sales (**Safety**) before they can embrace culture consulting (**Belonging**)

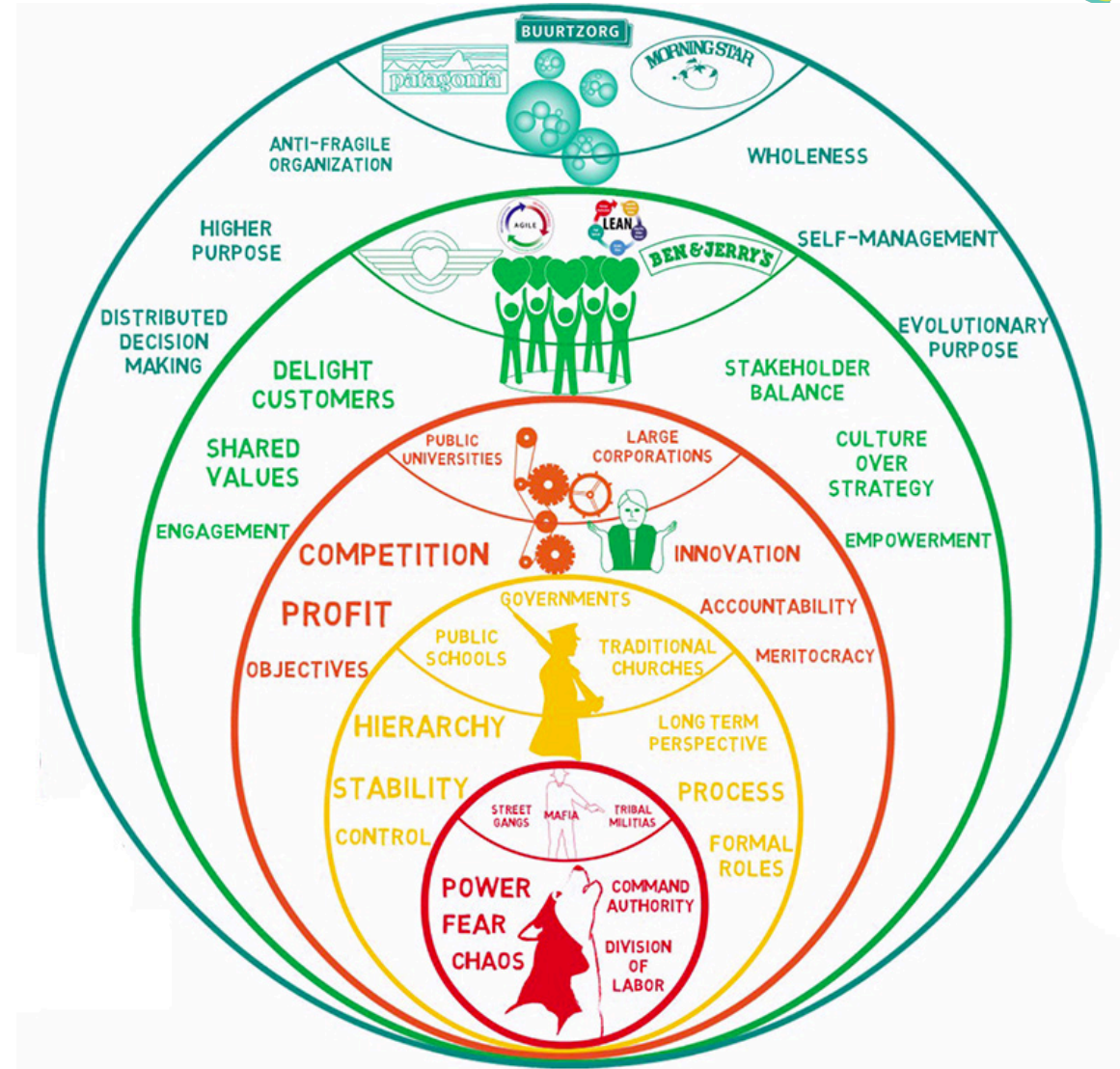






## Frederick Laloux Reinventing Organizations

Illustration by Rod Collins, Director of Innovation at [Optimty Advisor](#) and [published in the Huffington Post](#)



# Exercise: Which Level Is Your Organization?

Teal	Spiral Dynamics	Change appropriate for each individual	“The world is great!” “We embrace our differences!”	Star Trek, Morningstar, Buurtzorg
Green	Conscious Capitalism	Metrics to measure mission impact	“We’re great!” “Does that fit our mission?”	Virgin, Southwest, Patagonia, Zappos
Orange	Entrepreneurial	Follow the Money	“I’m great!” “I deserve this.”	Pixar, Intuit, Tesla, Proctor & Gamble
Amber	Corporate Hierarchy	Highest-Paid Person’s Opinion (HIPPO)	“My life sucks!” “That’s not how we do things.”	Government, Churches, Star Wars
Red	Family Business	The boss said so	“Life sucks!” “Every man for himself.”	Trump Enterprises, Game of Thrones
Purple	Small town family store	Why change?	“Life is a mystery!” “We don’t take kindly to strangers.”	
Level	Management	Affecting Change	You might hear	Examples

# The Agile Maturity Model



Level	Design	Planning	Development	Testing	Operations	People
Green	World Impact Planning, Teal	American Metrics	Reusable Code, Open Source Library Development/Support	World Impact Metrics	Continuous Deployment	Positive Psychology, American Performance System, 20% Time
Orange	Problem Interviews, Wizard of Oz, Frankenstein, Concierge	Pirate Metrics, Theory of Constraints	BDD, APIs, Architectural Stories, Pi Programming Technical Health	Gherkin Syntax, Automated Testing Diamond, DevOps	Automated Deployment	OKRs, American Performance Reviews, Losada Ratio
Amber	Product Managers, Start w/Why, MVPs, eWSJF, Prototypes, Wireframes	PI Planning, Roadmaps, Impact Maps, Burnup Charts	Cross-functional, Pull Model, ATDD, WIP Limits, Repository Branching, Tech Debt	Validation Criteria, Stories Verified In-Sprint, Integration/Regression Testing	Automated setup/builds, Build reports, Rollback	Double Aces, Decision Tree, Awesome Island, 360-Degree Quarterly Reviews
Red	Product Owners, Story Splitting, Backlog Grooming, Spikes, User Stories	ScrumMasters, Burndown Charts, Planning Poker	Daily Standups, Impediment Tracking, Serial Delivery, Repositories	Acceptance Criteria, In-Sprint Manual Testing, Bug tracking	Manual setup & Deployments	Retrospectives, Yearly Performance Reviews



	A	B	C	D	E	F
1	LitheSpeed		Agile Team Roadmap			
2			Level 3 - Data-Driven			
3			Design			
4	Product	Team	Problem Interviews	Experiments	Metrics (e.g. Pirate Metrics)	BDD
5	Product 1	Team 1				
6		Team 2				
7		Team 3				
8						

Level 3

	A	B	C	D	E	F	G	H	I	J	K
1	LitheSpeed		Agile Team Roadmap								
2			Level 2 - Contextual/Goal-Based								
3			Design			Planning			Development		
4	Product	Team	User Interface Prototyping	Data Interface Prototyping	eWSJF	MVPs	Roadmaps	Measurable Customer Impact Tracking	Forecasting (e.g. Burn up Charts)	Cross-Functional	Serial Delivery/WIP Limits
5	Product 1	Team 1									
6		Team 2									
7		Team 3									
8											

Level 2

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1			Agile Team Roadmap (see "Glossary" tab for scoring criteria)													
2			Level 1 - Agile Baseline/Foundational Techniques													
3			Design					Planning		Development	Testing			Operations		
4	Product	Team	Backlog Grooming	User Stories	Spikes	Workflow Maps	Story Splitting	Planning Poker	Burndown Charts	Daily Stand Ups	Acceptance Criteria	In-Sprint Testing	Bug Tracking	"Done Done" Tracking	Test Environment(s)	Retrospective
5	Product 1	Team 1	4	3	5	0	3	2	1	5	?	3	5	2	5	3
6		Team 2		1	3		2			4		3	4	2	5	4
7		Team 3														
8																

Level 1

## Glossary - Agile Team Roadmap

### Level 1 - Agile Baseline/Foundational Techniques

#### Design

##### Backlog Grooming

- Does your team meet regularly, Product Owner, business
- Do you ask the developers if the story is understandable
- Do you have a Definition of Ready, and do all User Stories
- Do you get developer confirmation before you mark a User

##### User Stories

- Do you break your work down into small chunks of user v
- Do they identify:
- the type of customer?
- the task to be performed by the user? (NOT the tasks to
- the goal of the user, i.e. the reason they are performing
- Are User Stories small enough to fit in a single sprint?
- Are they tracked in a central location (Jira) so that everyo

##### Spikes/Enablers

- Do you conduct research and exploratory work to answer
- Do you time-box Spikes with a time-frame for exploration
- Are Spikes and Enablers small enough to fit in a single s

##### Workflow Maps

- Do you create workflow diagrams of the overall logic of a
- Do they contain user interaction points (screens and data
- Do they highlight where the system interacts with databa
- Do they contain if/then/else logic scenarios?
- Do they identify when background processing tasks sho

##### Story Splitting

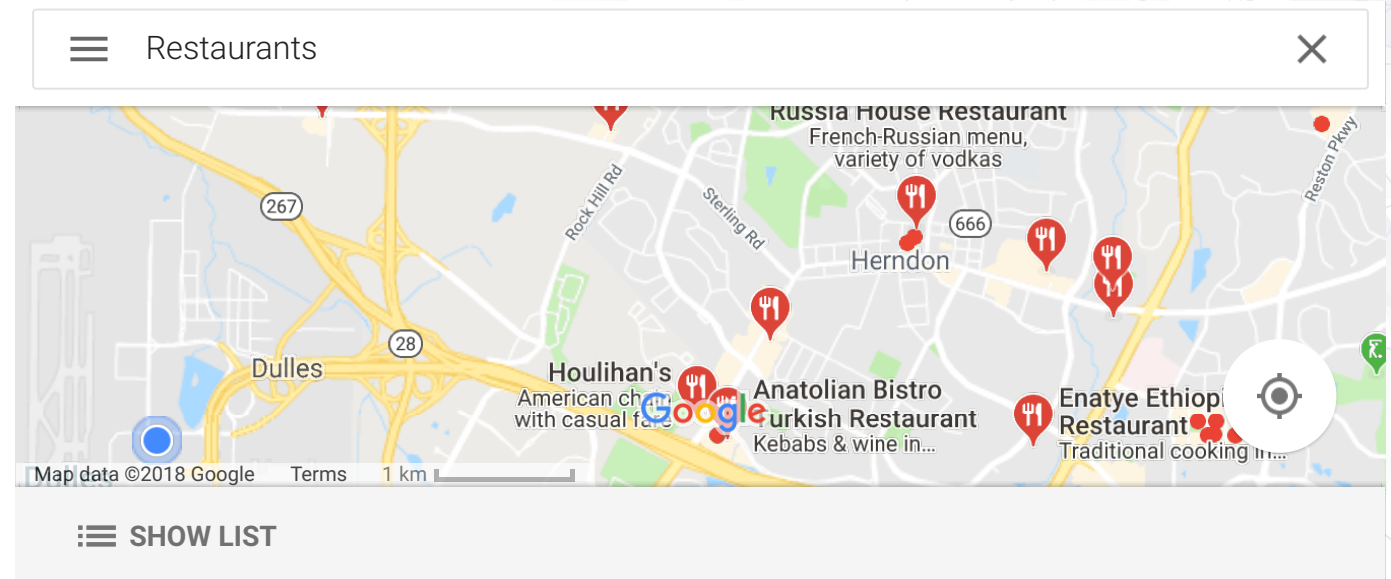
- Do all of your User Stories and Spikes fit within a single v
- Do all of your User Stories have clear inputs and outputs
- Do your User Stories have Spikes/Enablers, when neces
- accomplished within a week?

<https://lithespeed.com/agile-team-roadmap/>

# Agile Team Roadmap

# Welcome! Would you like to join us for lunch?

1. Take them out to eat
2. Show them a map of the area
3. They explore and find new restaurants



## Example: A New Team Member

# Agile Baseline

Level 1 - Agile Baseline/Foundational Techniques										
Design					Planning		Development	Testing		
Backlog Grooming	User Stories	Spikes	Workflow Maps	Story Splitting	Planning Poker	Burndown Charts	Daily Stand Ups	Acceptance Criteria	In-Sprint Testing	Bug Tra
4	3	5	0	3	3	2	5	?	3	
	1	3		2	5	1	4	1	3	

## Features

- Quick Wins
- Large productivity boosts
- Anyone can do them, whether they want to or not
- After you do it, the lightbulb goes on and they understand why.

## How to Measure

- Are they doing it? How often?
- Story Count Velocity
- Predictability (Actual vs Committed)
- Time to Close Impediments

**“Just do it!”**

# Organizational Alignment

## Level 2 - Contextual/Goal-Based

Design				Planning			Development			
User Interface Prototyping	Data Interface Prototyping	eWSJF	MVPs	Roadmaps	Measurable Customer Impact Tracking	Forecasting (e.g. Burn up Charts)	Cross-Functional	Serial Delivery/WIP Limits	ATDD	Tech De

### Features

- Promotes teamwork and Collaboration
- Goal-Oriented instead of Task-Oriented
- Takes a Long View
- Promotes Efficiency

### How to Measure

- Give teams a goal and metrics
- KPIs - Key Performance Indicators
- Don't focus on how.
- If not working, adjust the metrics



# Data-Driven Decision Making

## Level 3 - Data-Driven

Design			Development				Testing		Operations	
Problem Interviews	Experiments	Metrics (e.g. Pirate Metrics)	BDD	API-Based Architecture	Technical Health (vs Tech Debt)	PI Programming	Cross-functional Test Syntax (e.g. Gherkin)	Automated Testing Diamond	DevOps	Automated Deployment
2				4	1		3	2	4	
				1					2	

## Features

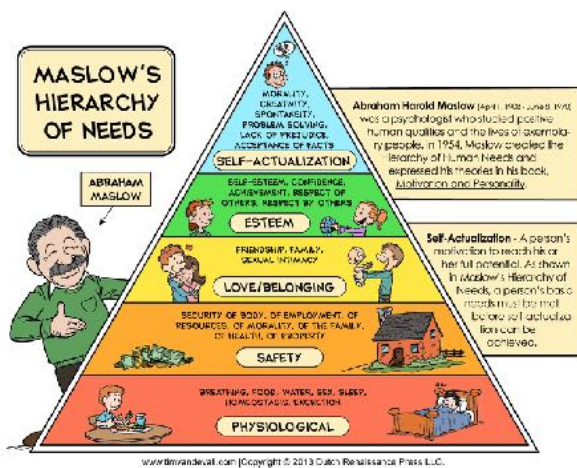
- Promotes direct customer engagement and collaboration
- Leverages the Scientific Method
- Leverages A.I. and automation
- Promotes self-organized teams and mutual respect

## How to Measure

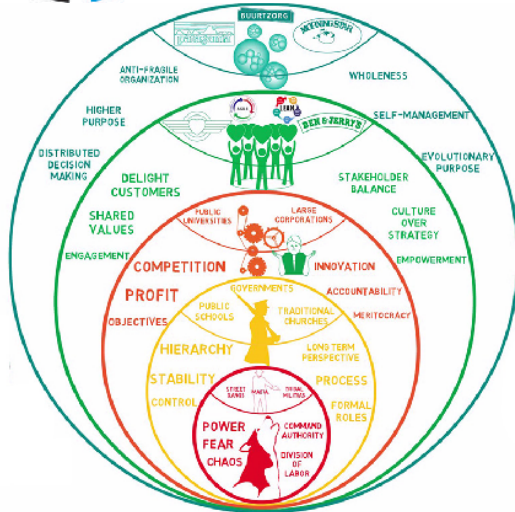
- Teams at this level know how to participate in strategy
- Have teams propose goals and metrics for approval
- Use dashboards to track real-time performance

“In times of change learners inherit the earth; while the learned find themselves beautifully equipped to deal with a world that no longer exists.”





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We can help you with:

- Agile HR “How you introduce something has more impact than what you introduce.”
- Are your Agile & DevOps “Done Done”? Wondering what’s next? Welcome to the Green, and Teal Organizational Levels
- Agile Teams, but Middle Managers or Executives don’t “get it”? Ask us about the Agile Leadership Academy

# The End