



A G I L E V E L

Dimensional Dynamic's instructions guide

AgiLevel

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If you wish to use AgiLevel's Dimensional Dynamic as a coach or consultant, please check agilevel.com for more details and contact us via admin@scrummanager.net.

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About AgiLevel

AgiLevel Dimensional Dynamic is a tool that helps companies assessing and developing their organizational agility in a prioritised and structured fashion.

By reviewing agile principles and values step by step, it's easy to identify what areas need improvement, which ones will be more resistant to change or require special attention, and what actions will be the most suitable to achieve the desired results.

We have developed this tool basing it on the principles of Scrum Manager® and Scrum Level®, and combining them with the experience of professional consultants and coaches. It is designed to facilitate the team's understanding and involvement in the transformation process. By "team" we refer to the people from the department or area to be assessed. They collaboratively evaluate the status and expected changes from three angles: operational, cultural, and structural. These three dimensions of the company result in a global diagnosis of its agility.

The diagnosis includes partial appraisals of different agile principles and values, and it identifies possible impediments that can hinder the improvement actions. It helps to understand the implications of certain changes, both in the operational dimension of the company and in its governance structure or culture. Some actions might lead to problems rather than solutions, and the dynamic will indicate so with a warning if that's the case.

The final result will be a set of guidelines to design an improvement strategy appropriate to the organisation's characteristics.

Who is this guide for?

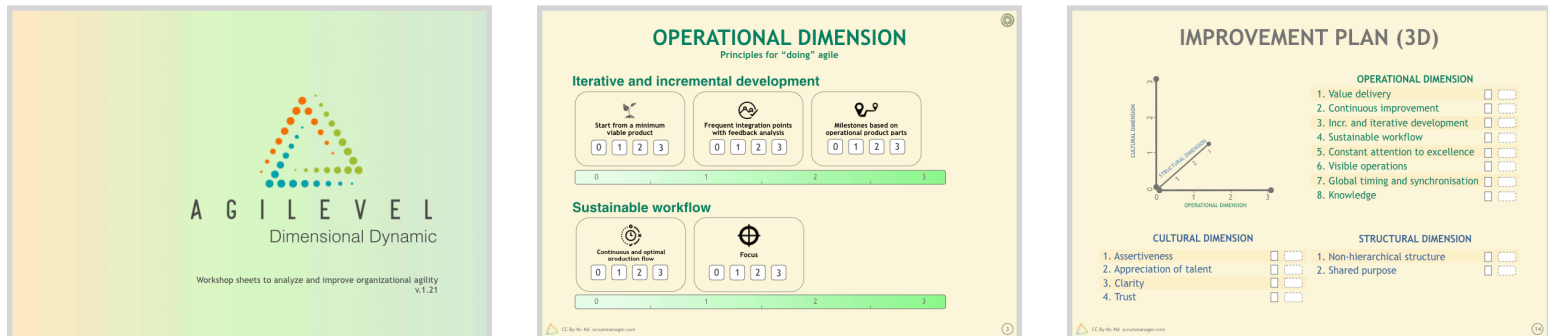
This guide and the materials of the dynamic are free to use for self-training and research purposes. It can also be used, with a license, by professional consultants and coaches as an analysis tools, and by Scrum Level teachers as a workshop activity.

If you wish to use it in your own team or company, you don't need a license, but we'd really appreciate it if you'd share your experience with us at agilevel.com, to help us spread agile knowledge and improve.

Materials¹

Workshop sheets

A set of sheets on which the team can carry out the evaluations, take notes, and keep track of scores and results.



Estimation decks

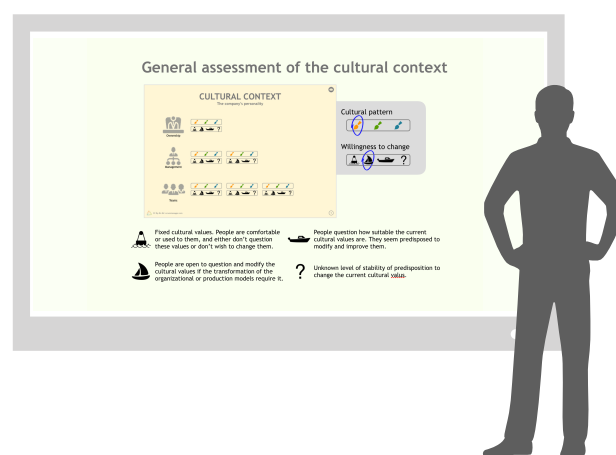
Each member of the team has one deck of cards to use during estimations. There are three types of cards:

1. Colors orange, green, and teal: to represent cultural paradigms.
2. Numbers from 0 to 3: to estimate the likelihood or truthfulness of statements.
3. Buoy, sailboat, jet boat, and interrogation sign: to estimate the willingness to change.



Slideshow

Some visual support to guide the workshop.



¹ You can find the last version of these materials at agilelevel.com.

Instructions

At the beginning of the cycle, note the organization's backlog of improvement actions and prioritize them for a general plan. By the end, the team will be able to compare where they started and where they are, and run a retrospective analysis of the decisions made.

We recommend to conduct the dynamic considering the organization's characteristics. Judging from their own knowledge and expertise, the conductor may decide to make up more or less transversal teams between different departments and levels. They should have sufficient skills to manage group dynamics in a manner consistent with the culture and composition of the teams. For instance: depending on the team's disposition, having managers as part of the activity that analyzes cultural context can be a good or a bad idea.

Roles

Conductor

Person in charge of the activity and, if applicable, responsible of consultancy actions. Ideally, this person should be proficient in agility and mentorship, and have a deep understanding of Scrum Level and this dynamic.

Team

A group of 4 to 6 people from the area of the company that's being analyzed. If the dimensions of the improvement plan require more participants, it's better to divide them into sub-teams of 4 to 6 people who will do the activity separately.

The conductor will average the results of the sub-teams to obtain a global assessment. Please note that making the decisions to ponder the results from several teams requires more experience.

Evaluation team

Members

The team should consist of a relevant sample of the company's area to analyze, including all areas of responsibility within it. The specific individuals will be picked at random or by the conductor if they aren't part of the company; it isn't recommended to let the organization pick the team members.

Preparation

The team members should have some former knowledge about the Scrum Level model, or at least be acquainted with the cultural paradigms, principles, and structures used in it.

The Scrum Level Essentials book is available for free at scrumlevel.com.

Activity: cultural context analysis

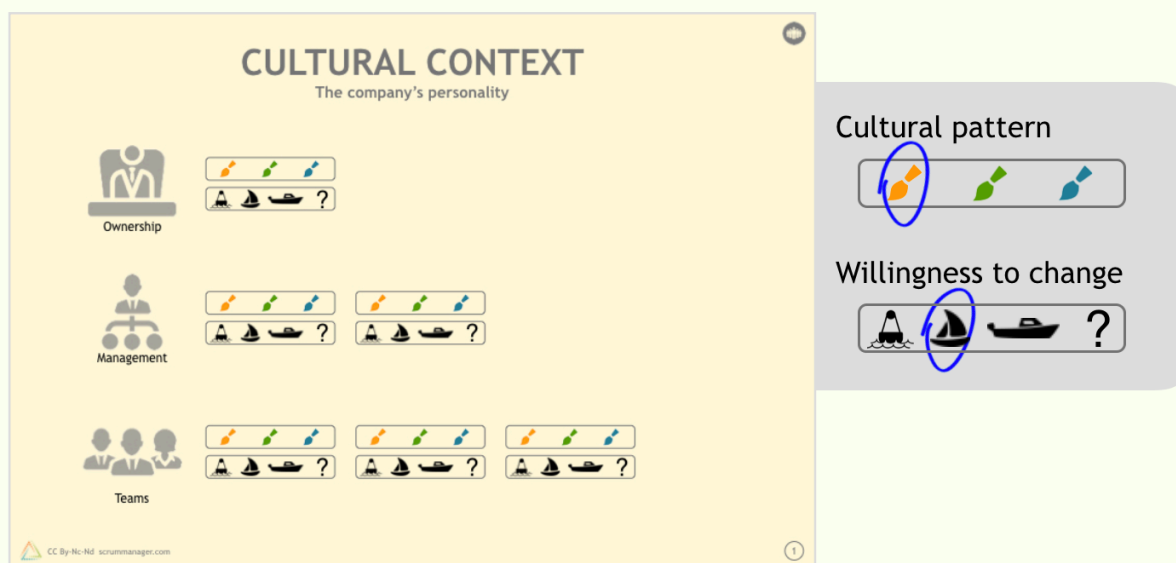
The cultural patterns of the company and the possible gaps between hierarchical levels or areas can be the root of resistance to introducing new principles or values. Especially if you want to increase agility in the organizational dimension (cultural and structural).

This initial activity paints a quick picture of the company's culture for the conductor. It's a crucial piece of information to analyze and design the most sensible strategy for the company's reality.

Materials

- Sheet n.1 on cultural context and corresponding slide.
- Color cards (orange, green, teal).
- Change predisposition cards (buoy, boats, interrogation sign).

General assessment of the cultural context



Background information for the team

A company is a systemic reality made up of three big subsystems: ownership (either an individual, a board of directors, a board of trustees...), executive staff, and work teams.

Each subsystem in turn can include others. Depending on the size of the company, there may be several directors of areas, branches, and departments, and several work teams. So it's possible to find a more or less homogeneity of cultural patterns in each block, and higher or lesser alignment between the blocks. These facts condition the fluidity of relationships and work in the company.

How to conduct the activity

The mechanic is similar to a well-known agile practice called planning poker.

Every team member has a deck of cards. For each subsystem of the company, starting from ownership, each member will draw the card that they think best represents its cultural model, and keep it face down, without showing it to the others. Once everyone has decided, the cards are turned to face upwards, and people discuss their decisions until they agree on one color. This final assessment will be marked on the activity sheet.

If the agility transformation requires cultural modifications, the team will assess the predisposition for change in each subsystem following the same procedure.

Activity: operational dimension analysis

Materials

- Operational dimension sheets and corresponding slides.
- Number cards.
- Change predisposition cards (buoy, boats, interrogation sign).

Step 1: assess each principle's components

The team will rate the components of each agile principle of the operational dimension from 0 to 3 by using the cards just like in the previous activity. Each corresponding provides a statement to guide the assessment of each component, so the team can estimate how true it is. The average score is marked then on the ruler under the principle's components, as depicted in this example:

The slide titled "OPERATIONAL DIMENSION" with the subtitle "Principles for 'doing' agile" shows an assessment interface. It features two main sections: "Value delivery" and "Continuous improvement".

Value delivery section includes three components, each with a 0-3 scale and a red circle around the score 2:

- Shared vision with client**: Score 2
- Team-client collaboration**: Score 1
- Variability**: Score 2

A green ruler at the bottom of this section shows the average score **1.6**. A large red 'X' is placed over the ruler.

Continuous improvement section includes one component with a 0-3 scale and a red circle around the score 2:

- Continuously improved practices**: Score 2

A green ruler at the bottom of this section shows the average score **2**.

At the bottom left, there is a logo and the text "CC By-Nc-Nd scrummanager.com". At the bottom right, there is a small circular icon with the number 2.

After estimating scores for each operational principle, we'll move on to the final analysis sheet and write the averages down on the “current” column. The total average for the operational dimension will be at the bottom.

Next, the team will rate how willing the organization is to make changes for each principle using the corresponding cards (buoy, boats, interrogation sign), and write down the results in the “situation” column. Finally, they’ll use the number cards again to rate how much impact they think an agile transformation in each principle would have on the overall improvement. This will help in prioritizing transformation actions.

Activity: organizational dimension analysis

Materials

- Organizational dimension sheets and corresponding slides.
- Number cards.
- Change predisposition cards (buoy, boats, interrogation sign).

Step 1: assess each principle's components

The team will rate the components of each principle on the corresponding sheet, following the same mechanic as in the operational dimension. Like before, they'll do so by considering how truthful each guiding statement is. Here's the slide to assess the “courage” component for the principle “assertiveness” as an example:

CULTURAL DIMENSION
Values for “being” agile

Assertiveness

Courage
0 1 2 3

Respect
0 1 2 3

Appreciation of talent

Incorporation and development
0 1 2 3

Retention
0 1 2 3

Career development
0 1 2 3

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“People face daily challenges with optimism and a problem-solving attitude. They don’t avoid new solutions, they admit their mistakes and limitations, and they hold each other accountable and share their progress openly.”

0

Never

1

Rarely

2

Often

3

Always

Step 2: assess the dimension as a whole

This dimension can be assessed in two different ways: for a 2 dimensional plan (2D), or for a 3 dimensional plan (3D). The operator is free to decide which approach will best suit the organization or the analysis' purposes.

- 2D: considers all aspects of the organizational dimension together.
- 3D: differentiates between values related to people's fulfillment and development and values related to the governance model of the company.

CULTURAL DIMENSION
2 dimension analysis

	CURRENT	PRIORITY	
		SITUATION	IMPACT
1. Assertiveness	<input type="text"/>	<input type="text"/>	<input type="text"/>
2. Appreciation of talent	<input type="text"/>	<input type="text"/>	<input type="text"/>
3. Clarity	<input type="text"/>	<input type="text"/>	<input type="text"/>
4. Trust	<input type="text"/>	<input type="text"/>	<input type="text"/>
5. Non-hierarchical structure	<input type="text"/>	<input type="text"/>	<input type="text"/>
6. Shared purpose	<input type="text"/>	<input type="text"/>	<input type="text"/>
Average <input type="text"/>			

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CULTURAL DIMENSION
3 dimension analysis

CULTURAL DIMENSION Values	CURRENT	PRIORITY	
		SITUATION	IMPACT
1. Assertiveness	<input type="text"/>	<input type="text"/>	<input type="text"/>
2. Appreciation of talent	<input type="text"/>	<input type="text"/>	<input type="text"/>
3. Clarity	<input type="text"/>	<input type="text"/>	<input type="text"/>
4. Trust	<input type="text"/>	<input type="text"/>	<input type="text"/>
Average <input type="text"/>			
STRUCTURAL DIMENSION Organizational arrangements			
5. Non-hierarchical structure	<input type="text"/>	<input type="text"/>	<input type="text"/>
6. Shared purpose	<input type="text"/>	<input type="text"/>	<input type="text"/>
Average <input type="text"/>			

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Apart from that, the procedure is the same. First, copy the scores from previous sheets to the “current” column. Next, assess the willingness to change for each value, and the impact a transformation would have on the overall improvement.

Activity: assess support for the improvement process

Materials

- Support sheet and corresponding slide.
- Number cards.

Assess each component

As in the previous stages, the team will consider the truthfulness of statements (in the slides) to rate each element.

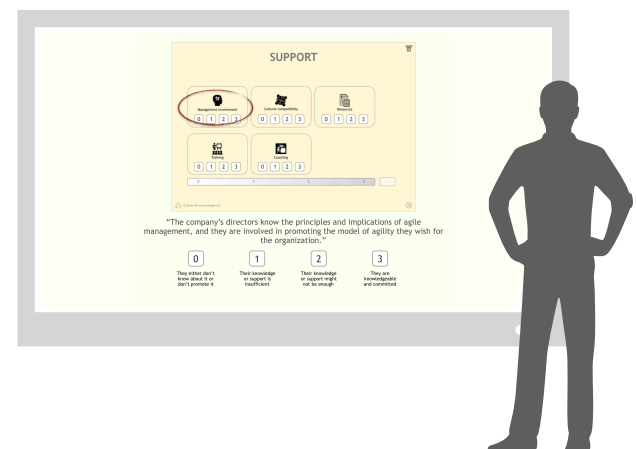
SUPPORT

Management involvement	Cultural compatibility	Resources	Training	Coaching
0 1 2 3	0 1 2 3	0 1 2 3	0 1 2 3	0 1 2 3
1	1	1	2	2

0 1 2 3

1.4

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Activity: design the agile escalation strategy

Materials

- Improvement plan sheet (2D or 3D) and corresponding slide.

The resulting information will now be used to represent the current level of agility in the organization, in order to design a strategy in 2 or 3 dimensions, depending on what the conductor and the team consider to be more appropriate.

How to design the plan:

1. Mark the average of each dimension on the graphic.
2. Decide what principles and values should be the focus of improvement actions, based on the assessments made for “situation” and “impact” in each case.
3. Set the order in which to tackle them.



As a general rule, one should pick those principles and values with high impact and high willingness to change. The higher those are, the higher the priority. However, the team and the conductor should feel free to ponder and reconsider this depending on the company's particular circumstances.

Activity: assess risk and special attention areas

Materials:

- Support analysis sheet and corresponding slide.































There are two main reasons why agility improvement processes fail:

- A lack of adequate support from the company.
- Misalignment with the company's organizational reality.

This final step is meant to identify support actions that may require special attention, based on their current situation and their willingness to change, so the improvement plan may succeed.

When placing marks in the “attention” column, consider that some aspects of the company’s support may have different impacts on the operational and organizational dimensions. The colors of the traffic light icon stand for the risk each aspect presents for the improvement plan, from green (no risk) to red (high risk).

SUPPORT
Analysis

ACTIONS	CURRENT	SITUATION	ATTENTION	
			OPERATIONAL DIMENSION	ORGANIZATIONAL DIMENSION
1. Management involvement	0 X 2 3 1	  ?	 	 
2. Cultural compatibility	0 X 2 3 1	  ?	 	 
3. Resources	0 X 2 3 1	  ?	 	 
4. Training	0 1 X 3 2	  ?	 	 
5. Coaching	0 1 X 3 2	  ?	 	 

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