
Agile Leadership Engagement Model

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Table of Contents

- Introduction 3
- The Model 4
- Part One: Creating the Vision 6
 - Make it compelling by answering "why?" 6
 - Welcome partnership. 6
 - Prepare to support planning. 6
 - Promote pull. 7
- Part Two: Building Out the Vision 8
 - Assess high-level feasibility..... 8
 - Invest, sustain, sunset...prioritize. 8
 - Build dedicated teams. 8
 - Hire well. 9
 - Consider operations and infrastructure..... 9
- Part Three: Delivering the Vision 10
 - Remember leaders are humans too. 10
 - Establish an approach to performance feedback. 10
 - Test and experiment with frequent releases..... 11
 - Be transparent. 11
 - Escalate big impediments quickly. 11
- Part Four: Removing Big Impediments 12
 - Handle bad team members. 12
 - Destroy silos. 12
 - Solve large-scale technical issues..... 12
 - Shield the team..... 12
- Part Five: Encouraging the Organization..... 14
 - Be visible. 14
 - But stay out of the way. 14
 - Temper your reaction to "failure." 14



| | |
|---|----|
| Monitor what needs to be monitored. | 14 |
| Make everyone feel bigger and confident. | 15 |
| Part Six: Supporting Team Planning..... | 16 |
| Establish clear boundaries. | 16 |
| Provide clarity of vision. | 16 |
| Assist with prioritization. | 16 |
| Expect hard decisions..... | 16 |
| Part Seven: Preparing to Deliver..... | 18 |
| Establish product syncs. | 18 |
| Build architecture roadmaps. | 18 |
| Find cross-team connection and collaboration points. | 18 |
| Part Eight: Learning About Our Customers..... | 20 |
| Become them. | 20 |
| Let them try things out. | 20 |
| Stay in discovery. | 21 |
| Inform leaders..... | 21 |
| Part Nine: Finding Organizational Flow | 22 |
| Focus outward..... | 22 |
| Learn how to resolve conflict..... | 22 |
| Temper the vision with reality. | 23 |
| Beyond the Blog..... | 24 |



Introduction

The concept for creating an engagement model for leadership started when a leader came up to me a few months into an Agile transformation and asked, “I don’t have any meetings on my calendar anymore, now what do I do?”

As I recall the ensuing dialog, I didn’t have a very good response. I remember saying something about creating self-accountable teams and hiring, developing and supporting direct reports in this brave new world. It was then I realized how easily the role of leadership could be overlooked when undergoing organizational transformation.

To be a nimble, adaptable, and agile organization facing new challenges and complexities, traditionally accepted leadership practices from the past must be radically changed.

This will require much more than obtaining leadership “buy-in” to become more “Agile.” Leaders will need to evolve along with the people participating on the front lines of change. They will need to model the same value-based behavior and activities we will be asking of our teams.

The **Agile Leadership Engagement Model** provides a high-level view of possible behaviors, work products and relationships between senior leadership, mid-level leaders and product teams. It will not however provide all the answers, as every organization and every situation will be different. This will not be the prescription for your organizational dysfunction.

What the model *does* provide is a *simplistic* starting point. A starting point for you or your guiding change coalition to begin including your leadership team into the transformation journey and to start the challenging conversations your organization has previously avoided. Use this model to start asking powerful questions of each other.

Why do we do the things we do? How can we make the conduit between leadership levels and our teams as free flowing and bi-directional as possible? How do we become an organization full of encouragers? What should we stop doing so we can build the features our customers are craving? What can we do to become laser focused on the needs of our customers? How can we create a workplace environment where people love to work?

This list can go on and on. Wherever you are on your organizational change journey I hope this model can trigger the right questions to ask and discover the best answers for your situation.

Feel free to contact me with any questions or comments you may have.

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An Overview of The Model



SENIOR LEADERSHIP/LONG-TERM - Establishing the long –term vision for our organization. For some companies, long-term may be measured in years and for others it may be in months.

MID-LEVEL LEADERS/MID-TERM - Planning our technology and team needs based on the vision. Building and caring for dedicated teams. Asking the question "Are they ready?" to our career managers to prepare for any training necessary for our people. Establishing a technology roadmap to remove complexities in your architecture.

PRODUCT TEAM/SHORT-TERM - Delivering elements of the vision using our Agile framework. Agile teams building and testing things frequently.

MID-LEVEL LEADERS/SHORT-TERM - Removing impediments that cannot be resolved by the team. Many of the blockers at this point are the result of poor planning.

SENIOR LEADERSHIP/SHORT-TERM - Encouraging and cheerleading the teams. Monitoring the progress teams are making relative to the key performance indicators established during the vision creation.

SENIOR LEADERSHIP/MID-TERM - Supporting the oversight planning and product team preparation efforts by providing funding and investment decisions.

PRODUCT TEAM/MID-TERM - Preparing to deliver by creating a road map with cross-team, architectural road map, or technical dependencies identified and accounted for.

PRODUCT TEAM/LONG-TERM - Learning the needs of our customers and how to integrate future technology advancements. Ongoing product team discovery should feed the creation of the organization vision.

MID-LEVEL LEADERS/LONG-TERM - Partnering between Senior Leadership and the Product Teams. Vision sharing and product learning are an important element to this collaboration. You can tell much about the culture of an organization by observing this relationship. Your company culture reveals itself here.



Part One: Creating the Vision



Many books and articles have been written advocating the need for leaders to provide a vision or to be a visionary. While it's easy to read and talk about vision, it can be elusive to create and even harder to effectively communicate.

In our [Agile Leadership Engagement Model](#) it all starts here. Over the long-term, senior leadership must provide the navigational "north star" for their teams to align to. The vision will provide focus for the ambition of our teams and specifically, the product owners. Product owners will rarely lack ideas or suggestions for their product and the organizational vision will be a strong filter as they create their product vision and backlog.

If your organization struggles with prioritizing and budgeting every year there is a good chance you have a vision problem. Without clear vision, everyone wants to do everything so project lists and product backlogs grow without anyone knowing if they are really offering meaningful value.

We know having a vision is crucial so for senior leadership in an Agile organization, here are a few things to consider when working on your vision:

Make it compelling by answering "why?"

I have referenced Simon Sinek's book "[Starting with Why](#)" in the past and if you haven't read it yet, I highly recommend it as a precursor to creating your vision. The temptation will be to jump into tactics and operational goals, but you must be able to effectively answer, "Why does the world need this business?" before going any further.

Welcome partnership.

We are asking our teams to be collaborative and [cross-functional](#) so why not be an example of this at the senior leadership level as well. Vision created in isolation will be harder to communicate and may lack the creativity other perspectives can bring.

Tap into the knowledge of your product teams as they have an intimate understanding of the needs of your customers. Listen to technical leaders and staff as they can deliver useful insights into the future of technological innovation. [The last post in the series](#) will cover how this partnership may evolve but for now, welcome others into the creation of your vision.

Prepare to support planning.

As you will see in the [next post in this series](#), planning to build out vision may need [hard choices and tough decisions](#). Mid-level leaders and managers will be making many of these decisions and they will need your support.



Promote pull.

Becoming an organization that "pulls" from a vision instead of having the vision "pushed" on them will start with the attitude at the senior level. Allow your agile teams to build their own product vision in alignment with the broader vision. Provide latitude for your product owners to "freestyle" on the specifics of their product and adapt based on the changing needs of your customers. As Jeff Bezos from Amazon.com says, "We are stubborn on vision. We are flexible on details." [Here is a great article](#) providing insight into the importance of vision and the mindset at Amazon.

References and Sources of Inspiration:

strategy + business (free subscription) [The Thought Leader Interview: Cynthia Montgomery](#).

Harvard Business Review (free subscription) [Strategic Intent](#).



Part Two: Building Out the Vision



If you are a director, senior manager or manager in an Agile organization, this post is for you. [With an organizational vision in place](#), you will be expected to plan and build the teams, processes and systems necessary to [deliver on that vision](#). You are the conduit between vision and implementation...never an easy task!

The challenge at this level of leadership is to balance the expectations of senior leadership with the qualities of team self-organization, self-responsibility and autonomy. Some days it will feel as if you are in the middle of a hurricane with senior leaders swirling above you and fast-moving agile teams below, all of this in addition to your responsibilities of career and performance management for your people.

There are many topics to be covered within this area of leadership, far more than can be covered in a blog post. I'll hit just a few themes I find are important in bringing some clarity to your leadership journey and beginning to align your leadership approach with agile values and principles.

Assess high-level feasibility.

Leaders at this level begin to make decisions on what will be needed to build out the vision. Do we have the necessary people and skills? Do we have the technical capabilities to bring the vision to life? Can our existing architecture support this vision? It's important to know what you are capable of today and what will be necessary for the future. These answers will be beneficial when we discuss partnering between senior leadership and product teams in [part nine of this series](#).

Invest, sustain, sunset...prioritize.

If you have a finite budget to work with (as most do), some tough choices will need to be made. [Marty Cagan calls this "portfolio grooming."](#) You will need to decide if any of your existing products should remain in a state of investment (new features are being introduced), sustain (only maintenance and upgrades), or sunset (product will be shut down).

If your company is currently organized around projects instead of products, the same concept will hold true. It is tempting to keep a long list of active projects but don't allow the appearance of busyness to replace delivering frequent value. Tough but necessary decisions must be made.

Build dedicated teams.

When designing your agile teams resist the urge to assign people to multiple teams. I have written about this in the past and call it the ["Curse of Allocation."](#) In my experience, teams with passion and strength are composed of [people dedicated to their team and product](#).

Hire well.

Bringing the right people to a team is the most important aspect of your job. The [cost of hiring people is expensive](#) and that price is magnified over and over when you hire the wrong person. [It only takes one toxic team member](#) to cripple what would be an otherwise incredible team. [Hire based on the values](#) required to be on a collaborative agile team.

Consider operations and infrastructure.

With multiple agile teams flying around proper consideration must be made for the people who support these teams. Gone are the days of lengthy project plans with plenty of time for operations and infrastructure to prepare for a release. Things will begin to move pretty fast so the ratio of teams to support people should be in alignment.



Part Three: Delivering the Vision



A [compelling vision is in place](#), [agile teams have been established](#) and hopefully filled with [amazing](#) and [fully dedicated agile teammates](#). Using a lightweight methodology, the teams begin to build product roadmaps and backlogs geared towards delivering on the organizational vision and meeting customer needs.

All sounds perfect...or is it? Often missing in a transformation to Agile is the interaction between managers and the newly formed agile teams.

From my experience, the relationship between agile teams and leaders (both senior and mid-level) often start from a tenuous position. The agile teams are trying something new, cool, and exciting. They are building strong relationships within their team and will often become self-healing through retrospectives and continuous improvement. We often bring in Agile coaches to guide them on their transformation journey.

Have we given the same attention to our managers and leaders? Many times the answer is no.

Our teams have been supplied a flashy new methodology but we have not provided our leaders and managers an approach to contribute and support this new agile environment. We expect managers to continue to use existing HR processes, goal setting templates, and performance management practices - most of which do not feel very agile.

How do we begin to harmonize the relationship between leaders/managers and agile teams? Here are a few topics to start the conversation:

Remember leaders are humans too.

People are often thought of and treated differently when they are in a leadership position. I have experienced this in the past. As hard as this may seem, learn how to interact with your leaders at a personal level. I realize this may be a touchy subject but I have covered this in a post called "[How to Interact with Leaders](#)."

Establish an approach to performance feedback.

Managers are typically expected to [perform semi-annual performance reviews](#) for their direct reports but their people are now working in a cross-functional and highly collaborative environment. This often occurs without manager close enough to observe and gather performance information themselves.



Further complicating things, it is often hard for team members on an agile team to [openly share feedback](#) to a manager when someone on the team is under-performing.

My suggestion would be to establish a performance feedback approach soon after a team has been created and do this collaboratively with the entire team. Will everyone give 360-degree feedback on the other members of the team? Should Scrum Masters give feedback on underperforming team mates? Who will supply feedback on the quality of the code being developed? Testers? Other developers? Answering these types of questions early should make the performance management process a little more tolerable and transparent.

Test and experiment with frequent releases.

Many leaders will need to adapt to "failure is an option" and "we need to test this theory" thinking. This will require a significant amount of trust between leaders and the product owner and team. Share ["The Lean Startup" by Eric Ries](#) with your organization if some are struggling with this concept.

Be transparent.

Establish team spaces as an open house and invite anyone and everyone to see the team in action. Leaders often come to expect status reports but start setting a "pull" mentality so progress and team health are visible at a glance with minimal effort.

Escalate big impediments quickly.

In the next post, we will address how leaders should remove big impediments from a team. Ideally, a Scrum Master will be able to shepherd team impediments to resolution but every so often, a big impediment will emerge. When this happens, bring the impediment to your leaders quickly.



Part Four: Removing Big Impediments



Our first three posts in this series established the foundation for leadership engagement in an agile organization: senior leaders [create the long-term vision](#), mid-level leaders [build the implementation plan and establish agile teams](#), and the product owners and

teams [deliver the vision](#) using agile [discovery](#) and delivery techniques.

As the product teams are building momentum through sprint delivery cycles, the most beneficial activity for mid-level leaders would be to remove big impediments.

Many big impediments are the result of incomplete or poor planning during the [Building Out the Vision](#) activities mentioned in Part 2 of this series. This would include incorrect [team composition, size and dedication](#), enterprise-level technical feasibility has not been validated, or a lack of prioritization.

As a mid-level manager or leader in an agile organization, here are just a few of many possible ways to remove the big impediments keeping your team from amazing things:

Handle bad team members.

As a leader and manager, the most important impediment you can remove will be relieving the team from a toxic team member. We hope this rarely happens but it does. We give everyone a chance to be a contributor and partner with the team but sometimes the connection just isn't there. [It takes just one person](#) to derail a team so act quickly when necessary.

Destroy silos.

Some of the hardest and most damaging impediments to tear down are those relating to departmental silos. Be a connector within your organization by removing process and sign-offs between groups. Think about ways your teams can co-create with others departments in your organization instead of passing around paper and email.

Solve large-scale technical issues.

Like many organizations, including the ones I have been associated with, you probably have lingering technical skeletons in your closet. Your product teams and support groups have established workarounds and kept things running with [duct tape](#) and [baling wire](#). Leveraging continuous integration and delivery will be challenging without resolving some of these technical constraints.

Shield the team.

This is a tricky one to handle but there may be leaders (especially the senior type) who would like to continue to interact with product development on a daily basis. This puts the product owner in a tough situation as the product roadmap becomes littered with features they may not truly believe in. The



product backlog begins to align with leader needs and does not align with customer needs. Become a filter for the requests and ideas of leadership before they affect the team. Just how the interaction between leadership and product team could happen will be covered [in the last post of this series](#).

Part Five: Encouraging the Organization

ENCOURAGE & MONITOR

While the product teams deliver the vision and mid-level leaders are removing big impediments for them, now is the opportunity for senior leaders to show [transformational leadership](#).

Transformational leaders have shifted from day-to-day command and control tactics to a focus on aspirational and directional vision. They set up networks and connect the organization in ways never thought possible. Most importantly, they are building people up and are concerned about the overall health of the people in the company.

To be the transformational senior leader your agile organization needs every day, here are a few tips to try:

Be visible.

[Tom Peters](#) calls this [MBWA - Manage by Wandering Around](#). As Mr. Peters states "this is a metaphor for being in touch, a metaphor for not losing touch with your employees, your vendors, your customers." Use your wandering time to continue to communicate and promote the vision but primarily to build relationships.

But stay out of the way.

While wandering, don't use this time to get too involved with the details of the products, as tempting as it will be. Use this time to get a pulse of the organization. This is your chance to show trust and begin to learn about people and how they do their job everyday. Ask powerful questions and build empathy for what the people of your company do to bring the vision to reality.

Temper your reaction to "failure."

The heartbeat of a team will be influenced by the reaction of its leaders, every time. Over-reaction will cause the team to lose faith and courage. This may be a good opportunity to coach and mentor a product owner but you must be able to trust them completely. Also, your mid-level leaders are watching so provide a good example for them.

Monitor what needs to be monitored.

And nothing more. Focus on key performance indicators for the features the teams are developing and other meaningful organizational metrics. It's easy to bog a team down with status reports and data requests but try to keep this to a minimum.



Make everyone feel bigger and confident.

Be a [genuine, full-force encourager](#). When you encourage someone you give them heart, you give them strength, you give them energy, you give them courage. The [origin of the word encourage](#) is actually "to make or put in courage." How much courage have you put in to someone today?

Imagine a fully encouraged and engaged workforce, aligned to a shared vision, working collaboratively and without fear. I believe it is possible but it will start with small changes and daily decisions.



Part Six: Supporting Team Planning



While mid-level leaders are planning how to build out the vision ([part two of the series](#)) and when the product owner and teams are creating product roadmaps ([covered in the next post](#)), senior leaders should play a supporting role.

Depending on the size of your organization, the planning (or portfolio management) for your product teams and subsequent product roadmap creation may become quite complex as aligning priorities and dependencies is often challenging. Senior leaders can help.

Here are a few things senior leaders can use to make this process easier and support their mid-level leaders and agile teams while they are planning and coordinating:

Establish clear boundaries.

Communicate any organizational constraints mid-level leaders and teams should be aware of prior to planning and roadmap creation. This would primarily be budgetary or technical (from a CIO or similar) but there may be others depending on your situation.

Provide clarity of vision.

Questions may emerge from your leaders or teams on aspects of the vision. Be available to assist them and be able to paint a vivid picture for where the organization or product suite is heading.

Assist with prioritization.

Many opportunities, features, technical advancements, and areas for innovation and improvement will be competing for the attention of mid-level leaders and product owners as they build product teams and product backlogs are established. Be available to assist in prioritization discussions if requested.

Expect hard decisions.

With prioritization come decisions. Often times these decisions will be hard as it is not easy to say no. The temptation may be to delay making some of these decisions as it's not popular to tell people their project or request will not be happening when they would like. [Constraints](#) will require choices so expect your leaders to make them.

We have now covered the three areas of focus for senior leadership in our Agile Leadership Engagement Model: [creating the vision](#), supporting planning activities, and [encouraging the organization](#).

Obviously, there will always be more responsibilities than those represented in this model but by focusing on these specific areas during an Agile transformation, senior leadership will understand where

they are most needed by agile teams, when their support is required, and when their effort should be concentrated on relationship building and encouragement.

Part Seven: Preparing to Deliver



One of the most challenging situations an Agile organization will encounter will be the coordination of dependencies and releases across product teams, operational or support groups, and areas of the company not using an iterative or lightweight

methodology.

With the [organizational vision in place](#) and agile teams established, product owners will begin to determine the features to be added to their product. The features are usually captured as part of the product vision, [which we'll cover in the next post](#).

These features are laid out over time in a product roadmap and expresses, in broad strokes, planned future releases. The challenge typically comes when synchronizing individual roadmaps and releases with others in a portfolio of products. Leadership involvement in the product roadmap creation should be through [continuing support](#) at the senior level and [planning coordination](#) across the organization by mid-level leaders.

To start preparing the way for effective delivery of the vision and ease some of the complexities of cross-team planning, here are a couple of thoughts to consider:

Establish product syncs.

Setup a frequent cadence for product owners to share their product vision and roadmaps with each other. This is especially useful for product teams with shared code, components, or technical infrastructure. This opens up the possibility of product owners "trading" features with another product owner who will be delivering a similar feature or touching the same code.

Build architecture roadmaps.

Another useful work product would be to create an architecture roadmap for each product. Similar in format to the product roadmap, the architecture roadmap would layout key architecture decisions, implementations, or upgrades affecting product delivery.

The architecture roadmap would be created by the architect or technical lead on the product team and would always be at least three to six months ahead of the. The architecture roadmap would also pull from enterprise architecture to align all products and systems with the enterprise technology vision. In the same way as with product syncs, technical leads from each team would sync with each other to coordinate their roadmaps.

Find cross-team connection and collaboration points.

Johanna Rothman has written extensively on this subject and I would recommend [reading her blog posts](#). Johanna recommends Communities of Practice for cross-team coordination and I agree. If you are



interested in getting Communities of Practices, [here is a post with an approach to get them started](#). If your Scrum teams are integrating with traditional waterfall projects, include them in your network of connections and use those dependencies to make your roadmap decisions.

Part Eight: Learning About Our Customers

Learn

product.

If a product has been flagged as "invest" [during planning](#), the product owner and team should be in a continuous flow of discovering valuable features to deliver for that product. They should be learning everything about who is (or could be) using their

The output of learning and discovering our users is captured in a product vision. The product vision should simply be identifying who they are, what needs they have, and what features should be created to satisfy those needs. The features generated with the product vision will feed the product backlog created in [Part 7 of this series](#).

Product discovery should not be done in a vacuum and ideally, not be done in isolation by only the product owner.

An [earlier post of mine](#) discussed this concept of performing user discovery as a partnership between the roles of product owner, architect, and user experience designer. Each role brings a unique perspective to the vast array of possible features and provides a balance and filter for the product owner. If possible, [I would leverage this approach](#).

Creating a product vision is not easy and will take a considerable amount of time and energy and should be constantly evolving. I would not consider myself an expert in product visioning but there are awesome resources available from real thought-leaders in this space such as [Mind the Product](#) and [Marty Cagan](#) to help.

I have however, interacted with many product owners and coached product teams through product discovery activities. From what I have seen and experienced, here are a couple of simple tips to remember:

Become them.

This is nothing new to most of you but the use of [personas](#) and [customer immersion](#) techniques are useful in discovery. Depending on your product, you may also need to get out of the office to hear what your users are saying. Whatever techniques you use, it's crucial to have real customers speak to you and for you to listen.

Let them try things out.

There are times in discovery when you may develop theories about how a product or feature would meet needs the user or customer. In this case, use small experiments to confirm your theories. Obtaining answers in discovery is cheaper than in delivery.



Stay in discovery.

As much as realistically possible, product owners should spend most of their time in discovery. There is a temptation for product owners to get heavily involved with the delivery cycles of the team. While we love to see product owners being interactive with their team, solving day-to-day impediments someone else should be solving detracts from valuable time with our customers. [Scrum Masters play a key role here.](#)

Inform leaders.

When you learn new things about the customer, let your leaders know. Share your theories on user behavior with them as your discovery should continuously feed into the evolution of the overall organizational vision. We'll cover this in our last post in the series called Building Partnership.

Note: I know there is debate to whether one should use "user" or "customer" when referring to the people interacting with our products. [I fall under this camp.](#)



Part Nine: Finding Organizational Flow



Becoming an organization with agility at its core will require a natural pull and flow between leadership and product teams. Especially as companies grow larger, this conduit between the [organizational vision](#) created by senior leadership, [strategic planning](#) by mid-level leaders, and the [product vision created by the product owner](#) has a tendency to become smaller and smaller, slower and slower, or doesn't exist at all any more to the point of varying degrees of organizational dysfunction.

[With the last post of the series](#), I'll share a few thoughts on how we can begin to build a free-flowing partnership between leadership layers and product teams.

The communication conduit often clogs at mid-level leaders. The [strategic vision](#) does not reach the teams and if it does, the vision has been filtered to a point where it no longer resonates or inspires. Insight into user needs and potential product

features found during discovery from the product teams only reaches so far into the visioning exercise or doesn't happen at all.

To function with business agility we will need to see an unwavering level of responsiveness to changing business and market conditions. It will also require a resilient level of trust and respect to attempt new things and build on ideas from every corner of the company.

To ultimately make the level of nimbleness and adaptability necessary to be competitive I believe, [as others do](#), organizations of the future will need to be less hierarchical than they are today. But until that day arrives, here are a few starting points to consider:

Focus outward.

Redirecting our energy towards our customers will require a bit of selflessness. It will mean being generous with each other, primarily through learning how to really listen to one another. Instead of being the hoarder of information, our first response when new data, theories, and ideas arrive should be "who should know this?" Become a radiator of information to all.

Learn how to resolve conflict.

As we all know, there will be different opinions and beliefs on what features will best meet our customer's needs. All one needs to know about how innovative an organization will be can be gauged by how they work through these conflicts. From the [Denma Translation of the Art of War](#), "This is not

simply about bringing the other person over to your side but bringing him or her to something larger than either side." This is where real innovation and collaboration lives.

Temper the vision with reality.

As Thomas Edison said, "Vision without execution is hallucination." If the vision calls for revolutionary innovation, more investment may be required or serious prioritization must occur during planning. Bring organizational feasibility into the vision by co-creating with mid-level leaders and product owners.

Beyond the Blog

The post that I hope has the most impact is [Part 1, “Creating the Vision.”](#) The message I am consistently hearing from people is they don’t know where their company, department, or product is heading (or where it should be heading). There is a real craving out there for visionary leaders, through the inclusion of all perspectives, to begin developing and communicating aspirational and directional vision.

I often hear, “Our leaders are getting involved with things they shouldn’t be getting involved in!” The foundation of the entire series of posts is to begin laying out a simple model to give leaders the time and space to focus on what they should be focusing on.

The conversation with leadership about disconnecting from day-to-day activities becomes easier when you have well-running Agile teams with the ability to deliver and test assumptions frequently. [Part 3, “Delivering the Vision,”](#) stresses four key points regarding the relationship between agile teams and leadership: transparency (sharing progress and results), escalation (allowing leaders to clear the path), inclusion (connecting with each other as humans), and evaluation (testing our theories and adjusting the vision and roadmap accordingly).

Part 4, [“Removing Big Impediments”](#) was the most fun to sketch, as this was the first tractor I had drawn in a long, long time. Seriously though, mid-level leaders can make a difference by putting energy towards handling bad team members and clearing the organizational path for their teams.

Of all the posts in the series [Part 5, “Encouraging the Organization”](#), is my favorite. The opportunity leaders have to flood their workforce with waves of encouragement will have an exponential impact.

And it really doesn’t take much; subtle gestures and a few words are all it takes. Just walk up to someone today and say “Thank you!” or “I’m proud of you!” Watch people walk with a little more spring in their step. The cost of encouragement is cheap but the benefits will leave a lasting legacy. When people know they are wanted and are contributing to something,

Hopefully, [Part 9, “Finding Organizational Flow”](#) begins to paint a picture of how the relationship and interaction between leaders teams can develop over time. For organizations to be a part of an increasingly competitive future, things will need to be dramatically different.

Bureaucracies and politics must be vigorously removed. Any obstacle to free-flowing information between leaders and departments and teams must be destroyed. Obsolete policies must be refined or removed. If senior and mid-level leadership did nothing more than focus on these things, can you imagine the workplace you would have? Culture change ignites here.

Hope you have enjoyed the series as much as I enjoyed writing it. Again, feel free to contact me if you have any questions – len@illustratedagile.com.

