

FIELD GUIDE



LEADINGAGILE



A LITTLE ABOUT OUR COMPANY

1.1. WHO IS LEADINGAGILE?

LeadingAgile was formed in 2010 as a company 100% focused on solving the complex problems facing real companies as they transition to agile. Since our formation, LeadingAgile has experienced significant growth and our models continuously evolve as we learn better what it takes to help companies meaningfully shift toward achieving greater business agility.

1.2. WHAT PROBLEMS DO WE SOLVE?

Moving to agile is never about adopting the practices of Scrum or even the values in the Agile Manifesto. Moving to agile is about solving real business problems. While your business problems are almost certainly unique, many companies that we work with are focused on predictability, quality, early return on investment, cost savings, innovation and product fit... just to name a few.

LeadingAgile works with you to solve your most pressing business problems.

1.3. WHAT DO WE BELIEVE?

We believe that an effective agile transformation starts by defining a rational system of delivery that is built around teams, manages the flow of value, and balances capacity against demand. The system results in extreme visibility

around the emerging product that we are producing and attention to the rate at which we are producing that product. All the services that we provide are in the context of this delivery system.

1.4. WHAT MAKES US UNIQUE?

LeadingAgile is a methodology and tool agnostic company. We work with you to understand the nature of your business problem meeting you where you are, assessing where you want to go, and crafting a customized transformation strategy plan designed to get you there in a way that is measurable, sustainable and delivers early results.

1.5. WHAT IS OUR APPROACH?

The outcomes that we are able to achieve can vary given the unique needs and constraints of your company. The path forward is adjusted to meet your unique requirements. What anchors a LeadingAgile engagement is the structure that we bring to solving the problem and the frameworks and patterns that we use to help you craft the solution. Everything hinges on creating a shared vision, getting buy-in, establishing a path forward, and executing with precision in everything we do.





OUR ACCOUNT MANAGEMENT APPROACH

2.1. WHO FROM LEADINGAGILE IS INVOLVED?

Every client engagement will have a Transformation Team consisting of one or more embedded Enterprise Transformation Consultants led by an Account Lead and a LeadingAgile Executive as well as support from any number of specialists and subject matter experts.

Enterprise Transformation Consultants are hands-on, and involved in the day-to-day interactions including training, coaching and workshops.

The Account Lead leverages our engagement model to work with our sponsors, internal management, and the LeadingAgile Executive to align understanding and help remove impediments to ensure the success of the overall engagement. The Account Lead will provide ongoing engagement oversight, guidance for you, support for our team on the ground and will ensure the LeadingAgile delivery framework is followed, all deliverables are completed, and that the deliverables are of sufficient quality.

The LeadingAgile Executive has ultimate responsibility and accountability for the success of the engagement. The LeadingAgile Executive works with your Senior Leadership to cast the larger vision forward, provide guidance around structure, governance, and metrics to ensure alignment with the overall strategy

of the organization.

The Specialists and Subject Matter Experts bring deep knowledge and experience in areas such as technical practices, architecture, product management, innovation, metrics, tooling, talent management, and software capitalization. They are brought in depending on the needs of the organization to help inform the transformation strategy and roadmap.

2.2. WHO FROM YOUR ORGANIZATION IS INVOLVED?

Ultimately, moving to a more agile way of doing business impacts everyone in your organization. So in one sense, everyone is involved on some level. It is critical that we have support from key leaders and team members in your company for the transformation to be a success.

We will work with you at the beginning of the engagement to identify an Executive Steering Committee and a Transformation Leadership Team. The Executive Steering Committee is made up of your most senior people involved in funding and identifying the goals and outcomes of the engagement. The Transformation Leadership Team is made up of senior leadership and any other managers or team members that are necessary to collaborate and support the activities of the LeadingAgile consultants.



Transforming to agile is something that you and your team will do. It is not something that LeadingAgile can do for you. We know what the end state looks like, we know what it takes to get there, we know the way, and we can help you avoid common mistakes that many companies make. In the end, it is up to you and your team to make it happen.

2.3. HOW DO WE RUN THE ENGAGEMENT?

At the beginning of every transformation the LeadingAgile team will meet with your Executives and key stakeholders to craft a set of goals objectives to guide your transformation. We call the first event a Transformation Workshop. Then we will meet with the Transformation Leadership Team to elaborate on the goals, objectives, and define supporting activities to guide your transformation. This meeting happens at the beginning of the engagement and every 90 days thereafter. The purpose of these meetings is to make sure everyone is in close alignment around what we are going to accomplish, who needs to be involved, and what it is going to take to get there. The outcome of the 90-day Planning meeting is an artifact we call the 90-Day plan.

2.4. HOW DO WE PERIODICALLY ASSESS PROGRESS?

Every 30 days the LeadingAgile team will meet with representatives from your Transformation Leadership

Team. We call this meeting the 30-Day Checkpoint. This meeting gives the client's leadership team a regular opportunity to speak with the LeadingAgile team, to evaluate progress, hold each other accountable, and make any course corrections based on what we have learned over the past 30 days.

2.5. HOW DO WE MAKE SURE EVERYONE STAYS INFORMED?

Every week, the Enterprise Transformation Consultant or Account Lead will provide a detailed, written progress report to the LeadingAgile Executive Consultant and your Transformation Leadership Team. The Principal Transformation Consultant will facilitate a review meeting with a designated subset of your Transformation Leadership Team. (We find this is too frequent an interval for executives so we do not ask them to attend.) The progress report helps us know the engagement is running according to plan, and all parties are honoring their commitments to the transformation.

2.6. HOW OFTEN DOES LEADINGAGILE PROVIDE AN INVOICE?

You will receive an invoice from LeadingAgile at the end of every month with any fees and expenses that were incurred during that month. LeadingAgile requires its consultants to track billable days; the dates worked, and



log all expenses. We will have the supporting records available for review should any issue arise on the engagement.

2.7. HOW DOES LEADINGAGILE HANDLE EXPENSES?

LeadingAgile generally seeks to behave in a fair and equitable manner and treat our client's resources as if they were our own. In all things, we defer to what is reasonable and err on the side of caution. If you have an expense policy that needs to be followed, please provide us with a copy and we will certainly comply.

If you have any questions regarding our invoices or expenses, please contact Denise Taylor at denise@leadingagile.com and we will answer your questions as soon as we possibly can.

2.8. HOW DOES LEADINGAGILE HANDLE PRICING AND CONTRACT MANAGEMENT?

We have a simple pricing structure. Our general policy is to craft contracts as a fixed time and fixed cost project where the scope emerges as we learn more about your organization. The total cost of an engagement is billed in equal monthly installments. Additional offerings such as our ScrumMaster certification, specialty training sessions or consulting from one of our specialists can be added and billed at a separate rate if not considered in the original

Statement of Work (SOW). Otherwise, all services related to the transformation would be included in the SOW and would be addressed there.

To maintain this simple pricing structure, we rely on keeping our consultants consistently utilized throughout the year. We view our engagements as an exchange of value and strive to operate in the best interest of our clients. In return, we ask our clients to operate in our best interest by letting us know if they could possibly end their engagement with LeadingAgile prematurely.

Your LeadingAgile Executive will engage your Executive Steering Committee before the end of each SOW period to assess intent to continue, and begin the SOW process for the next contract. This approach allows both you and LeadingAgile the opportunity to periodically reevaluate progress, and decide if it still makes sense to move forward.





ENGAGEMENT STRUCTURE AND DELIVERABLES

3.1. HOW DO WE KNOW WHERE WE ARE GOING?

A big part of working with LeadingAgile is establishing a solid understanding of your goals and objectives and then defining your end state vision and laying out a path for how each group within your organization will get there. At the beginning of every engagement, following the Transformation Workshop, LeadingAgile will work with your organization to define a team based organizational structure, a governance model for each team operating in the new system of delivery, and a set of metrics. Also, an effective tooling strategy must be defined to instrument the process, baseline the data, and provide your company something to show progress against.

3.1.1. WHAT DOES IT MEAN TO DEFINE VISION?

Every organization will have clear understanding of goals and objectives, having explored various methods and approaches as part of the Transformation Workshop. This will help improve your business outcomes, and foster ownership around a vision for the future and a plan to get started.

3.1.2. WHAT DOES IT MEAN TO DEFINE STRUCTURE?

Every engagement will have a clear statement for how we plan to form teams, who will be on the teams, and the function and purpose of the team. Coming out of the Transformation Workshop and then the Discovery and

Transformation Strategy phase, there should be clarity on how the organization plans to move forward. For larger organizations, it is sufficient to define the structure for the pilot while the details around the remainder of the organization continue to emerge.

3.1.3. WHAT DOES IT MEAN TO DEFINE GOVERNANCE?

Every team will have a clearly identified Lean, value-stream based, process map for how work will flow in the organization. We will document what deliverables will be produced, a RACI chart for each of the deliverables, and a RACI chart for any of the stage gates occurring between the different steps in the process. Every team will be assigned a governance flow so there is clarity around how that team will operate relative to the rest of the organization.

3.1.4. WHAT DOES IT MEAN TO DEFINE METRICS & TOOLS?

Metrics are the lifeblood of any agile transformation. After the initial Transformation Workshop and Define the End State discovery, a set of metrics are collaboratively identified and documented. A plan is created for how to baseline the metrics, a cadence agreed upon for how to communicate improvement, and a strategy for how the metrics will be captured and incremental improvement will be measured.



3.2. HOW DO WE DEFINE ROLLOUT PLAN?

LeadingAgile believes in an iterative and incremental approach to agile adoption and transformation. We create a Transformation Roadmap, which divides your organization into operational units and progressively matures the delivery process within each unit over time. We use a metaphor of expeditions, basecamps and treks to explain how the transformation will take place over time.

3.2.1. WHAT IS AN EXPEDITION?

Expedition is the term LeadingAgile uses to describe a group of teams, at all levels of the organization, which are going to make the transition to agile. The pilot organization will have the first expedition to make the journey. All the other teams after the pilot expedition will be organized into subsequent expeditions and scheduled to start the journey themselves.

3.2.2. WHAT IS A BASECAMP?

Basecamps provide a checkpoint to measure against and to assess intermediate progress toward your longer-term agile transformation goals. Basecamps allow us to demonstrate intermediate progress against a known end state, with a known set of performance characteristics, so that we can

articulate progress as the teams are learning the skills necessary to sustain the transformation.

3.2.3. WHAT ARE TREKS?

Treks are simply a collection of basecamps, which define the particular journey a given expedition is traveling on as it makes progress toward its ultimate business objectives. Every expedition can find itself in a different starting place, with a different finish line, and the trek allows the LeadingAgile team to show that not all teams are on the same path with the same goals and objectives.

3.3. HOW DOES LEADINGAGILE MAKE CHANGE STICK?

It is not worth going forward if everything is going to go back to the way things were once the consultants leave. Sustainability is a key factor to ensuring long-term success with your agile transformation. LeadingAgile ensures sustainability by giving you the right tools to maintain the changes that you have implemented after the LeadingAgile team has completed their work.

3.3.1. HOW WILL WE KNOW HOW THE SYSTEM IS PERFORMING?

LeadingAgile performs a sustainability based



competency assessment of each expedition's ability to sustain the progress made at each basecamp. Any given expedition may have the skills and knowledge to sustain the change. However, sometimes people and organizational factors get in the way of being able to continue making progress after the LeadingAgile team has moved on. We will use this data to inform our coaching plans and job aids.

3.3.2. HOW WILL WE INTERNALLY COACH OUR TEAM AS WE RECOGNIZE PERFORMANCE ISSUES?

You will receive targeted coaching plans as a result of the periodic competency assessments. Based on the assessment for any given expedition, the LeadingAgile team will co-create a remediation plan with your Transformation Leadership Team and the expedition involved to tailor the coaching strategy to meet the unique sustainability needs of the given expedition.

3.3.3. WHAT KIND OF SUPPORTING ARTIFACTS WILL I NEED?

Every engagement requires capabilities to support and sustain the transformation. We will help customize job aids, knowledge bases, coaching aids, communities of practice, and tooling, and help with

development of your internal coaches to support the transformation. LeadingAgile will work with you throughout the engagement to tailor these to the specific needs of your organization.

3.4. WHAT IS THE LEADINGAGILE APPROACH TO CHANGE MANAGEMENT?

Intentionally managing change is a key success factor when doing any kind of organization wide transformation work. Our approach centers around working with the Executive Steering Committee and Transformation Leadership Team to manage stakeholder expectations and communicate progress and intent. The Account Lead will facilitate these efforts and is available to support and guide you when things get difficult.

3.4.1. HOW DO WE IDENTIFY KEY STAKEHOLDERS ON THE ACCOUNT?

At the beginning of the engagement, we identify key stakeholders and relationships between stakeholders through stakeholder mapping and business interviews. When we know who our key stakeholders are, we can communicate and manage expectations effectively. We will continue to assess our stakeholders throughout the engagement to understand who is likely to struggle and who is likely to provide internal support. We can then



work with the organization to define activities to ensure that the transformation is a success.

3.4.2. WHAT DOES A COMMUNICATION PLAN LOOK LIKE?

Letting people know what we are going to do, what we are trying to achieve and the plan for achieving it are critical factors for success. Communication Plans can involve publishing marketing materials, facilitating workshops and lunch and learn sessions, presenting in existing management meetings, conducting remote webinars, and crafting other general communication that helps everyone understand what is going on and how it impacts them personally.

3.4.3. HOW WILL LEADINGAGILE PROVIDE SUPPORT AND GUIDANCE ?

Coaching hours are a great tool for providing ad-hoc term transformation plan or have already been transformed and are in need of additional support. Providing extra time for those teams in need can make a big difference in how the transformation work is received.





ENGAGING THE LEADING AGILE TEAM

4.1. WHO IS YOUR LEADINGAGILE TEAM?

Your LeadingAgile Team has a LeadingAgile Executive, an Account Lead and one or more Enterprise Transformation Consultants. We believe that each of these roles plays a critical part in creating a successful engagement. Our consultants bring an average of 20 years' experience in the industry and are thought leaders in agile transformation work. We put them into a delivery model that maximizes everyone's chance for success.

4.2. HOW TO ESCALATE AN ISSUE OR CONCERN?

Occasionally, we may have a consultant assigned to an account who for some reason is not a good fit for your organization. Many times, these situations arise from a misunderstanding or some sort of stylistic difference. Often these issues can be resolved quickly or remediated in a way that does not disrupt the flow of the engagement.

We welcome the opportunity to take care of these issues quickly before they become a significant concern. Sometimes clients are hesitant to escalate a concern for fear of burning a bridge with the consultant or creating disruption on the engagement. In every case, it is better to escalate and take care of the issue and not allow it to get out of control.

4.3. HOW TO REQUEST ADDITIONAL SERVICES?

If you have a need for additional services that are not part of the SOW or part of the current 90-Day Plan, please inform your Account Lead or LeadingAgile Executive. It is of utmost importance that your Enterprise Transformation Consultant stays focused on delivering the activities and outcomes agreed upon by LeadingAgile, your Executive Steering Committee and your Transformation Leadership Team.

We are happy to help with any request and by working with your Account Lead or LeadingAgile Executive, we ensure your Enterprise Transformation Consultants continue to deliver value to you in the current 90-day plan.

4.4. HOW TO END THE ENGAGEMENT?

Occasionally, for any number of reasons, it is necessary for a client to terminate an engagement early. We ask that you notify your LeadingAgile Executive as soon as you suspect any changes to our planned activities together. For the most part, we expect that any changes would come up in either the 90-Day Planning Meeting or 30-Day Checkpoint. Staying in constant communication, as things change day-to-day, is critical.



Every so often, LeadingAgile may determine that for whatever reason the transformation has finished early, is not progressing or we are not getting the necessary support from the organization and we may recommend an early termination of the account. If this ever comes up, we will escalate to your Executive Steering Committee and primary economic buyers and make that recommendation in writing prior to the end of the current SOW.



LEADINGAGILE



WHO IS WHO ON YOUR ACCOUNT



MIKE COTTMAYER

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CHIEF EXECUTIVE OFFICER

LeadingAgile co-founder and CEO, Mike Cottmeyer is passionate about solving the challenges associated with agile in larger, more complex enterprises. To that end, he and his team are dedicated to providing large-scale agile transformation services to help pragmatically, incrementally, and safely introduce agile methods. He spends most of his time leading and growing LeadingAgile, doing sales and business development, developing content, and providing strategic coaching for clients.



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DENNIS STEVENS

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CHIEF METHODOLOGIST

LeadingAgile COO and Co-Founder, Dennis Stevens has been helping organizations solve the challenges associated with product development in larger, more complex enterprises for over 25 years – leading major projects and Agile transformations in many global enterprises. He helped bring Agile to PMI: serving on the steering committee of the PMI Agile Certified Practitioner, as past leader of the PMI Global Community of Practice, and is currently the Vice Chair on the Software Extension to the PMBOK. He has been published in Harvard Business Review on Business Value driven SOA and on an incremental approach to large scale Agile in a Cutter Consortium Executive Report.



LEADINGAGILE



JIM CUNDIFF

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PRESIDENT

LeadingAgile President and Co-Owner, Jim Cundiff, brings over 25 years of executive management experience with public and private sector corporations, nonprofit organizations and private investment funds. His role as President is to help position LeadingAgile to the forefront of the industry. Developing ways to advance our mission and objectives and to promote improved services, profitability and growth.

He has held various positions including: president, executive director, development officer, foundation director, managing director and VP of marketing and development. Jim has spent time as a private consultant to Fortune 500 executives, government officials, board directors and executive teams to create, develop and implement programs designed to build capacity, increase revenue and enhance service offerings.



LEADINGAGILE



RACHEL HOWARD

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CHIEF CULTURAL OFFICER

Rachel has over 20 years of experience helping organizations acquire the right talent to help them achieve their desired business goals. She's passionate about helping individuals develop and grow by enabling them to discover and explore a learning path that's suitable for helping them achieve both their personal and professional goals. As the Chief Cultural Officer at LeadingAgile, Rachel is responsible for crafting cutting-edge talent acquisition and retention strategies, but her mission is to connect our company to the team, and our team to our clients so that, together, we can all achieve a singular, cohesive vision.



LEADINGAGILE



CHRIS BEALE

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CHIEF TECHNOLOGY OFFICER

Chris is a strong Transformational, technology executive who's known for also being a pragmatic innovator. Chris knows how to consistently build and lead world-class organizations that deliver extraordinary business outcomes quickly, efficiently, frequently, and reliably. He's successfully delivered custom software applications, packaged software implementations, Agile Transformations, business intelligence initiatives, project rescues, and legacy application migrations in numerous industries and organizations. Some of Chris' prior roles include Chief Architect for Digital Manufacturing at Dassault Systems, VP of Product Development at Inteplan, VP of Technology at Cengage Learning, and VP of Professional Services at Pillar Technology.



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PAUL ARGIRY

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CHIEF FINANCIAL OFFICER

Paul has over 25 years of financial experience at organizations such as: Red Hat, Jabil Circuit and PwC. As the VP and Treasurer at Red Hat, he headed the Treasury & Risk Management, Finance M&A, Credit & Collections, Payroll, and Global Workplace Solutions. He also presented on their business, financials, and operations to North American, EMEA, and AsiaPac investors. While at Jabil Circuit, Paul built, trained, and developed their global Finance M&A team from the ground up and managed a global foreign currency hedging program that saved the company \$1M annually. Also, at Jabil, Paul led the financial aspects of M&A transactions that provided \$3.3B of revenues and exceeded \$600M in purchase price.



LEADINGAGILE



BRIAN SONDERGAARD

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CHIEF INNOVATION OFFICER

Brian is a seasoned, Senior Executive who's widely recognized an expert in creating and leading Lean organizations that leverage Agile methodologies to improve business outcomes and deliver sustainable growth. Brian is a strategic thinker who has demonstrated more than 30 years of leadership in business Agility, strategic planning, software product development, IT operations, and organizational design and Transformation. Brian is actively involved in the Atlanta IT community where he previously served on the GCLA Advisory Board, and as a member of the Board of Directors for the Technology Association of Georgia. Before LeadingAgile, Brian served as the CIO at Fiserv.



LEADINGAGILE



TIM ZACK

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CHIEF MARKETING OFFICER

Tim Zack is a digital native with over 10 years' experience solving marketing problems with technology. Throughout his agency career he has helped brands drive bottom line results through an approach to marketing that encourages continuous refinement through learning. He has a passion for brands that share his hunger for success, that are full of energy, and have an insatiable need to continually improve. Tim's strengths are in strategic planning, UX, analytics, marketing automation, content and search marketing. Leveraging his experience across multiple industries, Tim drives marketing strategy for LeadingAgile.



LEADINGAGILE



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