

# The Importance of Agile in HR

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# The Importance of Agile in HR

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In this article I explore several topics that are critical for human resource (HR) professionals seeking to understand the importance of agile for HR. These topics are:

1. What is Agile?
2. Agile for “HR”
3. Disciplined Agile
4. Disciplined Agile People Management

## 1. What is Agile?

The Agile movement began in 2001 with the publication of the Manifesto for Agile Software Development [1] written by 17 people who came together to capture how to successfully develop software in practice. The key thing to note is that they focused on what works in practice, not what they wished would work in theory. This was a significant departure for the software engineering field at the time.

The manifesto is captured in the form of four value statements. The text of the manifesto is:

We value:

1. *Individuals and interactions* over processes and tools
2. *Working software* over comprehensive documentation
3. *Stakeholder collaboration* over contract negotiation
4. *Responding to change* over following a plan

That is, while there is value in the items on the right, agilists value the items on the left more.

Although the original focus of the agile movement was on software development, it has since expanded in scope to DevOps (the combination of software development/delivery and operations), the information technology (IT) area in general, and now business agility. Aspects of business agility include the application of the agile mindset to finance, control/governance, procurement, marketing, and of course HR. To reflect these extensions, I was involved with the development of the Disciplined Agile Manifesto [2] to support the inclusion of lean strategies to address the realities of modern enterprises.

Modern enterprises, at least the ones that are successful in today’s competitive marketplace, are agile in nature. They are able to adapt quickly to changes in their environment without losing momentum while still delighting their customers. They do this through:

1. **Delegated decision making.** Agile organizations push decision making authority and responsibility into the hands of the people doing the work.
2. **Experimentation.** Agile teams experiment to learn about how to work together better, to discover what their organization’s customers actually need, and to learn about themselves. Very good things happen when you enable people to create and learn without fear of failure.
3. **Flexible work.** People, particularly knowledge workers, require flexible working hours because we don’t always think on a specific schedule and we need to weave other aspects of life into our days. Similarly, we require flexible work locations because sometimes we do our best work in a café, at home, on a beach, or a myriad of other locations. To put things in perspective, I’m writing this very sentence at 8 am on a Saturday morning at 10 KM above Deer Lake Newfoundland on my way home to Toronto after working for a week in Johannesburg. The bottom line is that work is no longer 9-to-5 at a specific location.
4. **Recognizing that teams are the primary organizational building blocks.** Agile explicitly recognizes that teams of people collaborate to get the job done, it’s not just about individuals any more. Nor is it about projects, which can be very disconcerting for the project managers among us.
5. **Embracing being a complex adaptive system (CAS).** Agile organizations are CASs, networks of teams that are constantly learning and evolving while they collaborate with one another. A critical implication of this is that one approach, one process or one procedure, will not work for you.
6. **Aligning their organizational structure and cultural.** Agile organizations will morph their structure to reflect their current culture, a natural side effect of an experimental mindset. And of course your organizational culture and structure both evolve over time, so you will be constantly adjusting your HR strategies to reflect this.

## 2. Agile for “HR”

There are all sorts of great advice out there for how HR professionals can become more agile, and in fact I’ve found that a very good read is Pia-Maria Thoren’s book *Agile People* [3] as are many blog postings on the topic. Here are what I believe to be the critical philosophies that underpin an “Agile HR mindset”:

1. **People aren’t resources.** This was certainly a lament as long ago as the early 1990s and I suspect even earlier than that. Calling someone a resource is insulting at best and agilists simply don’t tolerate it. Step one on your agile journey is to jettison the term resource once and for all, an implication being that “human resources” must be dropped too. I prefer People Management, although others suggest pretty much any combination of

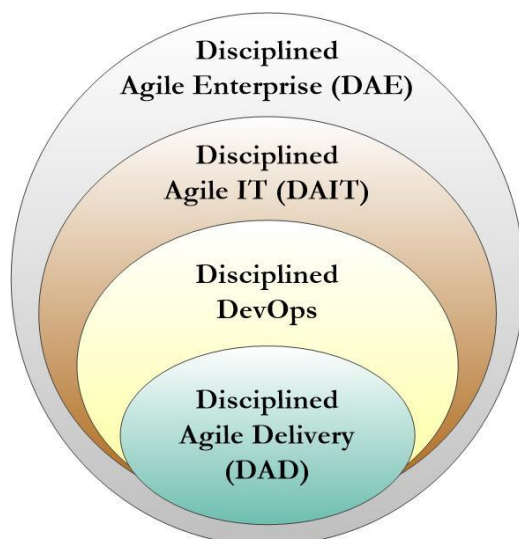
Talent/People/Human and Management/Coordination/Operations. Pick what works best for your organization, but please abandon the term HR. Enough is enough.

2. **Support agile teams.** We need to enable teams to organize themselves, manage their work, and evolve their own process or “way of working.” The concept that a team owns their own process, that it isn’t inflicted upon them by “all seeing management,” is a fundamental of agile. Having said that, in the Disciplined Agile (DA) framework we recognize that teams must still be governed appropriately.
3. **Be flexible.** Our organizations are complex adaptive systems (CASs) where teams will work together in an evolving, context-sensitive manner. One People Management strategy does not fit all, and any strategy we adopt must adapt as the situation evolves.
4. **Energize people.** People who are energized, who are happy, who love their work are far more productive than people who are not [4, 5].
5. **Enable people.** We need to help teams get the funding and time required for training and coaching, to help set up communities of practice (CoPs)/guilds where people can help each other to learn their craft, and to help set up communities of excellence (CoEs) that offer explicit learning support to people. We also need to help leaders to push decision making authority to the people who do the work and help these people to accept this authority and responsibility.
6. **Inspire leadership.** We want to inspire the leadership within our organization to be agile themselves, to move away from command-and-control management and become true leaders who motivate and enable our staff.
7. **Reduce cycle time.** People managers must be able to move fast to support people when they need it, to hire good people when they become available, and to support the evolution of teams and their way of working when required. The implication is that People Management professionals need to perform key activities such as recruitment and supporting learning in a continuous manner, rather than the episodic efforts of traditional HR that are often motivated by the needs of a specific project or budget.
8. **Enable cultural and structural fit.** When culture and structure become misaligned we effectively throw sand into the gears of our organization, reducing our ability to delight our customers. Our People Management efforts must actively strive to monitor this fit and then work with teams to help them become better aligned.
9. **Reward for agile behaviors.** If we want to have an agile organization then we need to reward staff for behaviors that lead to this. The implication is that we need to reward people for delighting customers, for effective teamwork, for collaboration, and for learning. [6]
10. **Govern lightly.** Yes, there are still legal requirements and financial constraints that we must operate under. But, it’s important to recognize that we often have significant leeway in how we choose to respond to those requirements and constraints. So respond lightly. Effective governance is based on educating and motivating people to “do the right thing” and then making it as easy as possible for them to do so. Wording this as an agile value – Motivation and enablement over command and control.
11. **Expect to be disrupted.** Agile People Management isn’t your grandfather’s HR.

## Disciplined Agile

The Disciplined Agile (DA) process decision framework provides lightweight guidance to help organizations streamline their information technology (IT) and business processes in a context-sensitive manner [7]. It does this by showing how the various activities such as solution delivery, operations, enterprise architecture, portfolio management, finance, security,

legal, and many others work together. The framework also describes what these activities should address, provides a range of options for doing so, and describes the tradeoffs associated with each option. In effect, DA provides the process foundation for business agility. As you can see in the following figure, there are four levels to the DA framework:

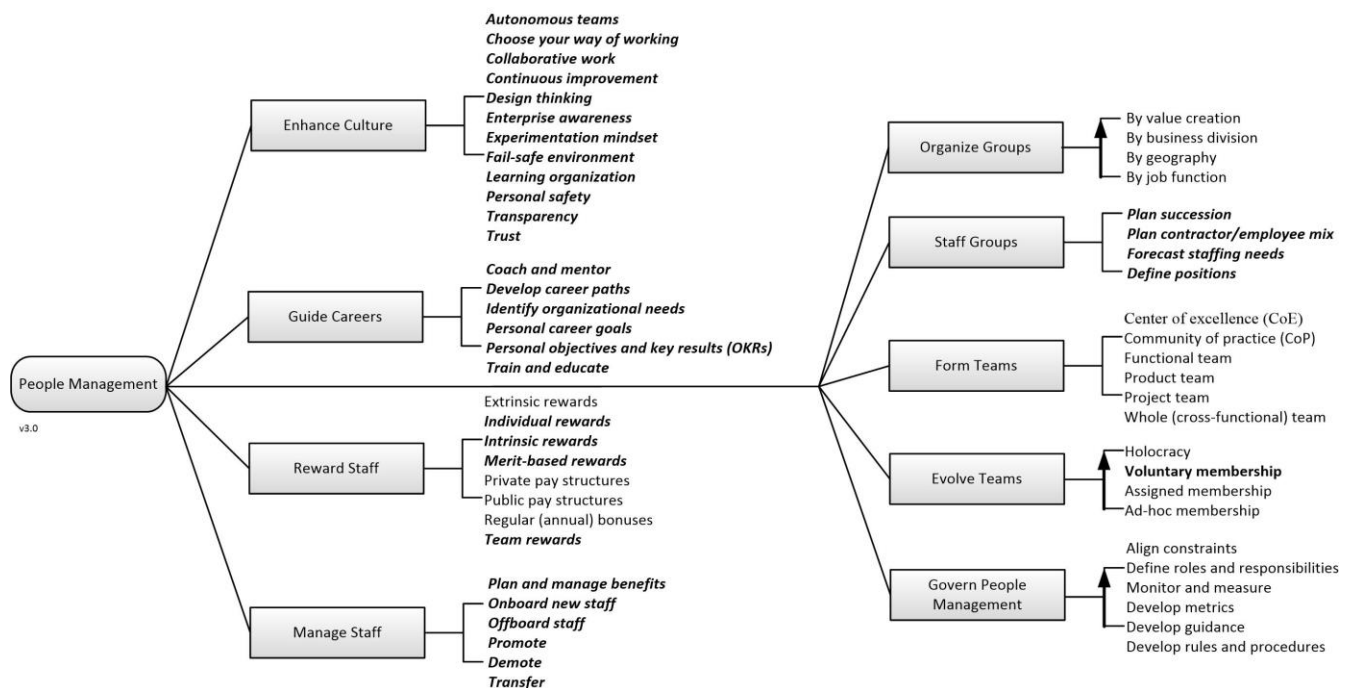


1. **Disciplined Agile Delivery (DAD).** DAD addresses all aspects of solution delivery, from beginning to end, in a streamlined manner. This includes initial modeling and planning, forming the team, securing funding, continuous architecture, continuous testing, continuous development, and governance all the way through the lifecycle. The framework includes support for multiple delivery lifecycles, including but not limited to a basic/agile lifecycle based on Scrum, a lean lifecycle based on Kanban, two modern agile lifecycles for continuous delivery, and an exploratory lifecycle based on Lean Startup. A critical point for People Management professionals is that agile software development teams are whole, which by that we mean they are cross-functional and often made up of cross-functional people, and they work in different ways reflecting the situation that they face.

2. **Disciplined DevOps.** This is the streamlining of IT solution development and IT operations activities, and supporting enterprise-IT activities, to provide more effective outcomes to an organization. The implication for People Management is that DevOps requires flexible, skilled people who are even more cross-functional than what we see at the DAD level.
3. **Disciplined Agile IT (DAIT).** DAIT addresses how to apply agile and lean strategies to all aspects of IT. This includes IT-level activities such as IT operations, support, data management, reuse engineering, and other capabilities. People Management professionals need to realize that the technical nature of IT, the corresponding culture of technical people, and the marketplace for IT talent, requires an approach that reflects the IT context – generic strategies and policies generally do not work well in the IT space.
4. **Disciplined Agile Enterprise (DAE).** A DAE is able to anticipate and respond swiftly to changes in the marketplace. It does this through an organizational culture and structure that facilitates change within the context of the situation that it faces. Such organizations require a learning mindset in the mainstream business and underlying lean and agile processes to drive innovation.

## Disciplined Agile People Management

People management goes by many names, including human resource (HR) management, talent management, human operations, staff management, people operations, and work force management to name a few. The fundamental goal of Disciplined Agile's People Management process blade is to attract and retain great people who work on awesome teams.



The potential activities that are performed by, or at least supported by, a people management team are captured in the People Management process goal diagram. The notation of this diagram is straightforward. The rounded rectangle indicates the process goal/area, in this case People Management. The cornered rectangles represent decision points, in other words issues or things that you need to think about, regarding the process area. These are described below. The lists on the right are potential practices or strategies that you might consider following to address the decision point.

The DA framework doesn't profess to have identified all strategies available to you, but it does claim to have identified a representative number that should be sufficient to make it clear that you have choices. The aim is to help you identify the best approach that your team can currently implement given your skillset, your culture, and the context of the situation that you currently face. When there is an arrow beside the list of options that's an indication that the strategies towards the top of the list are generally more effective than the strategies towards the bottom. So in some ways DA includes aspects of a process maturity model if you're interested in that sort of thing.

As you can see, the process decision points that you need to consider for people management are:

1. **Enhance culture.** An important aim for your people management efforts is to enhance the agile facets of your organizational culture.
2. **Guide careers.** Your organization should support the career aspirations of its staff, providing opportunities to people and supporting their efforts to achieve their goals.

3. **Reward staff.** There are many ways that people and teams can be rewarded, including base pay, bonuses, and non-monetary rewards. For some people in some organizations their pay is publicly known (for example, in Canada public employees who make over a certain amount have their salaries published annually) whereas for most people their remuneration strategy is private.
4. **Manage staff.** Your organization needs to perform basic functions such as hiring (onboarding) staff, letting people go (offboarding), promoting, demoting, transferring them and providing benefits to people.
5. **Organize groups.** What is your strategy for organizing your IT department? Your Marketing department? Your Finance department? For example, for IT do you do it by job function (e.g. have a business analyst group, a project management group, and so on), by geography (e.g. a North American IT department, a European IT department, and so on), by business division (e.g. an IT group to support Retail banking, an IT group to support brokerage, and so on), or by value creation (e.g. an IT group to support a specific product line). Or combinations thereof?
6. **Staff groups.** You need to identify, and plan for, your organization's staffing needs. This includes succession planning for senior people, critical technical positions (yes, that includes all those legacy COBOL programmer positions), and other critical roles such as product owners. This also includes staff capacity planning/forecasting as well as determining your mix of full time employees (FTEs) and contractors.
7. **Form teams.** There are different types of teams that can be formed to address a given function, each of which are (self) organized differently.
8. **Evolve teams.** Team membership and structure evolve over time, and there are several common strategies that enable this. Some teams are ad-hoc, forming when they're needed and disbanding when they're not, with little or no management intervention. Sometimes people are assigned to teams and sometimes people volunteer to be on a team. Some organizations are holacracies where teams are self-organizing and have defined strategies for enabling collaboration and communication between them.
9. **Govern people management.** Your people management activities, just like all other activities, should be governed effectively. An important aspect of people management governance is the definition of roles and responsibilities as is the usual measurement and monitoring activities.

### Concluding Thoughts

Agile is real and it is here to stay. People Management professionals are an integral part of agile organizations, or at least they are when they are agile themselves and are prepared to support and enhance agility throughout the organization. There are no easy solutions to becoming agile other than the willingness to do the hard work required to learn and adopt new ways of working. You can do this.

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