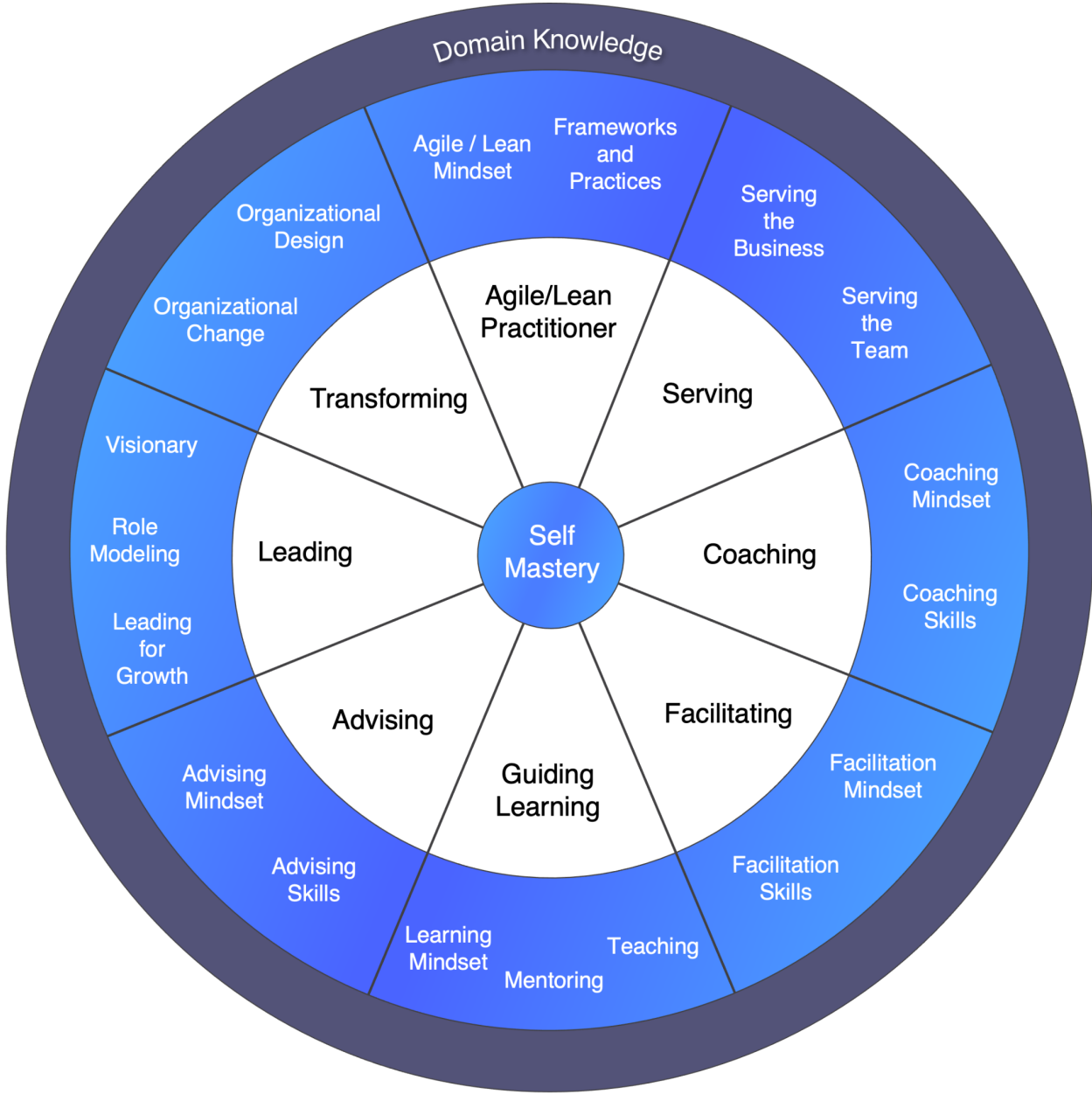


# Edition Version 3.2

## The Agile Coaching Growth Wheel



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# Introduction

*Agile coaching is an evolving profession encompassing many disciplines, including individual, team, and systemic coaching, facilitating, teaching, and mentoring, all applied with an open and deliberate bias towards using agile approaches to help address the client's needs.*

- [Agile Alliance Coaching Code of Ethics](#)

Agile coaching helps people who work in rapidly evolving situations become more effective and successful.

When we use the term “agile” in this document, we are referring to philosophies, frameworks, processes, and techniques that help improve outcomes in evolving contexts, so “agile” includes Lean Manufacturing, Lean Startup, Scrum, Extreme Programming, etc.

## What is the Agile Coaching Growth Wheel?

### The Growth Wheel

The Agile Coaching Growth Wheel is a tool for Agile Coaches, Scrum Masters, Leaders, and anyone who wants to get better at helping teams and organizations grow and deliver sustainable value using Agile / Lean principles and practices. This tool is also best used with another coach to help support them.

The wheel has eight segments or spokes, representing eight competency skills areas built around a hub of self-mastery. The tread around the outside of the wheel represents your domain knowledge. These are knowledge areas that in turn support the skills of the main competency areas.

### Why create this wheel?

At the 2018 Agile Coaching Retreat in London, a collection of coaches came together in an effort to tackle the question “what are the skills needed to successfully coach teams and organizations in Agile?”.

As the use of Agile has become more and more mainstream the foundational definition of good Agile coaching skills has remained loosely defined and this lack of definition has resulted in unqualified people presenting themselves as Agile Coaches with little experience and low competence. This creates something of a lottery for organizations choosing the right people with the right skills for their needs.

The London retreat created the first generation of the Agile Coaching Growth Wheel, as an effort to address these questions and challenges.

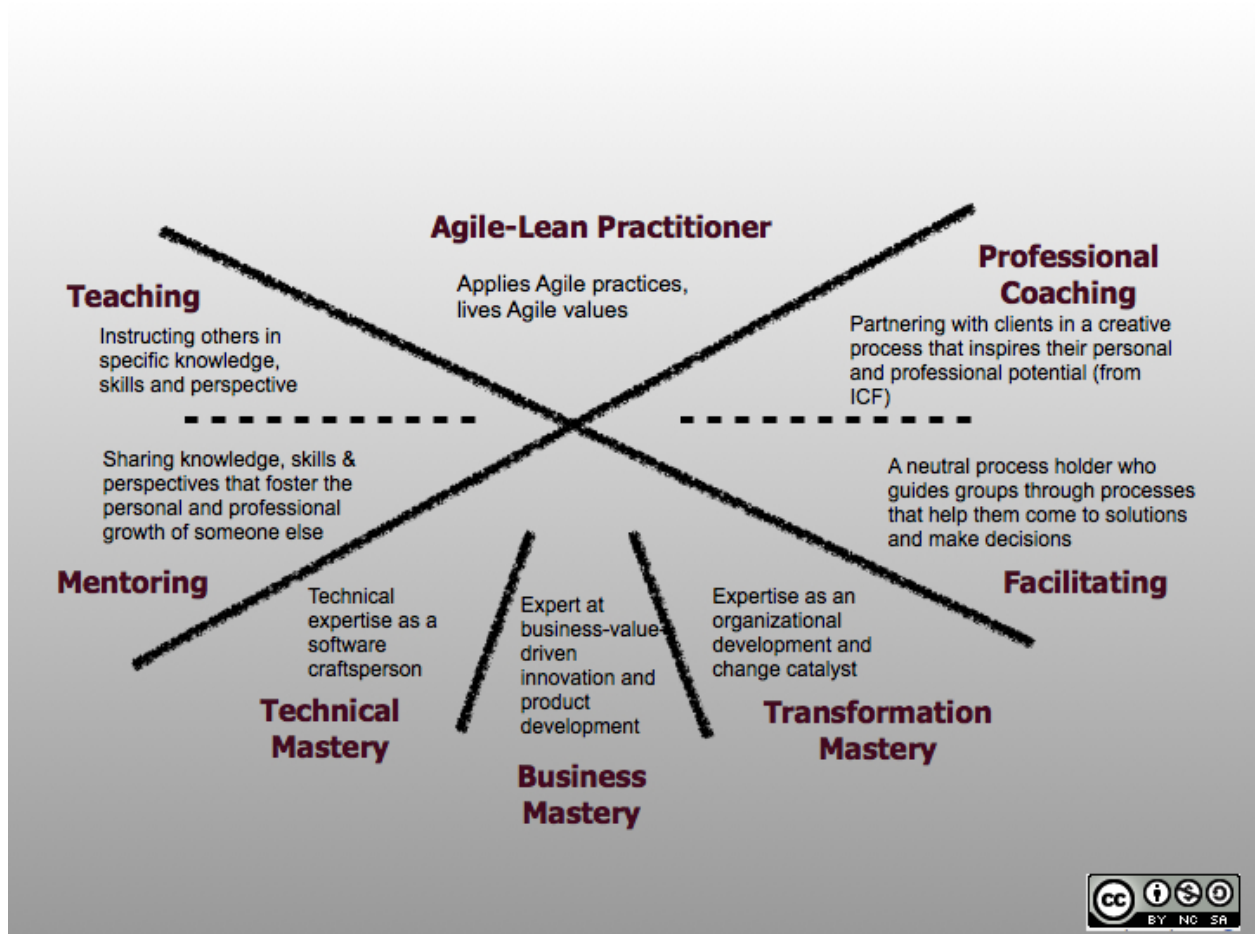
In 2020 Bob Galen wrote [Agile Coaches Need More Than Coaching Skills](#), which sparked a renewed conversation around what skills are essential to the craft of Agile Coaching. His blog was an implicit challenge to everyone in the Agile Coaching community to think about how we were presenting ourselves, growing ourselves, and helping the next generation of Agilist to be the best they could be.

Partly in response to Bob's article, in the Spring of 2021 the Scrum Alliance hosted an Open Space with the question of "what competencies are needed for a successful Agile Coach." The outcome of the Open Space was the formation of a working group whose goal was to "Professionalize the world of Agile Coaching."

Using the 2018 Agile Coaching Growth Wheel as a start they refined it to what you see today. Our goal is that the Agile Coaching growth wheel lays down the core competencies that allow practitioners to go from good to great through a reflective process with clear guidance to assess their progress.

### **Where We Came From, On the Shoulders of Giants**

In 2011 Lyssa Adkins and Michael Spayd created a competency framework for Agile Coaches. Intentionally this was not a competency model, as it did not define specific behaviors, skills, knowledge, or proficiency levels. The "X-Wing" model, as it is commonly known, is built around the idea of Mastery Areas and a personal coaching stance to act as a guiding star when choosing which of four skills to use: coaching mentoring facilitating and teaching.



For over a decade the Adkins/Spayd model has been the gold standard for defining the skills and competencies of Scrum Masters and Agile Coaches. It was the logical place to start from when the 2018 London coaches sought to take it to the next level.

We can't thank Lyssa or Michael enough for the work they have done to professionalize the world of Agile Coaching. They have been a constant source of inspiration to all of the volunteers that have worked on this project.

Recognizing this solid foundation, the contributors of this work believe that more definition is required to further professionalize the world of Agile Coaching and the result is the Agile Coaching Growth Wheel initiative.

### Where are we going?

Defining the Agile Coaching journey will allow educators, coaches, and leaders to better support the growth of Agile Coaching competencies in individuals by developing learning and development programs and aligning competencies to the formal Agile Coaching certifications that already exist. It will also build confidence in the industry

around the future profession of any job roles that involve the use of Agile Coaching skills. We are making it easier for an Agile organization to select the right person for the right job with confidence.

The next step is to complete the Agile Growth Wheel with all nine competencies fully defined and aligned to the skill progression path. Once this is complete the intent is to build out resources that will guide a learner to developing specific competencies to the level they need or desire.

The Scrum Alliance has committed to using the final Growth Wheel as a foundation for updating its coaching certifications and it is hoped that other Agile and Scrum bodies will recognize the Wheel as a new standard in Agile Coaching and the entire community can step towards professionalizing the world of Agile Coaching.

## How to use the wheel and guidance?

The purpose of this wheel is to help you self-reflect or reflect with a coach, mentor, or colleague. The objective here is to help you understand where you are so that you can explore and develop further.

### **Step 1: Identify an area of improvement**

Walk through each of the competency areas (the 8 spokes and the self-mastery hub), use the guidance below to make sure you have a high-level understanding of each area. You can't improve everything at once, so select an initial area of focus to work on.

### **Step 2: Reflect on a competency area**

For each competency within the competency area, go through the guidance and assess your competence against the 5 levels of assessment. Use the definitions and challenge yourself on your competence levels. The goal is not to get to level 5, the goal is to know where you are and where you want to go next in your journey.

### **Step 3: Brainstorm options and generate actions.**

Use the insight generated in the reflection to brainstorm options for growth and then formulate a plan of action. This part works best working with a coach, mentor, or colleague.

### **Step 4: Inspect, Adapt, Repeat**

The rest of the guidance is just that: guidance. The detail against each level for a specific competence is meant as reflection, not as a checklist. There may be guidance at the practitioner level that you cannot fulfill 100%, perhaps they are not vital to you or your context. As you explore the guidance, you might find a better fit for yourself.

## The Nine Core Skill Competencies

**Self Mastery:** At the heart of great agile coaching is the need to invest in yourself through learning and reflection and take care of your wellbeing. Self-mastery starts with a focus on yourself, having the emotional, social, and relationship intelligence to choose how you show up in any given context.

**Agile/Lean Practitioner:** an Agile/Lean practitioner has a deep and tacit understanding of the principles behind Agile and Lean and has experience in working with frameworks and practices of Agile and Lean.

**Serving:** serving is about being concerned with the needs of the team or business over your own agenda. They do this from the stance of Servant Leadership which focuses primarily on the growth and well-being of the team or business and the communities to which they belong.

**Coaching:** coaching is partnering with a person, team, or organization (client) in a creative process to help the client to reach their goals by unlocking their own potential and understanding. A coach is able to accept the client as a whole and capable, and serve their agenda ethically.

**Facilitating:** facilitating increases the effectiveness of a group of people to align in a collaborative way, to interpret their context, and mutually identify the most valuable outcomes desired. A facilitator has the skills to create a neutral environment of openness, safety, and innovation in a group setting.

**Guide Learning:** guide learning is about effectively growing an individual, a group, or a team's skills and enabling them to be competent and resourceful. With this competency, you choose the most effective learning method to help the learner achieve their learning objectives and inspire future learning.

**Advising:** advising is the ability to bring your experience, insights, and observations to guide the client towards a shared understanding of the value that can help them to achieve sustainable success, even after you have moved on. As a trusted adviser, you are invested in the success of the client, creating a long-term and sustaining relationship with the client.

**Leading:** leading is about being the change you want to see to make the world a better place. As a leader, you are capable of catalyzing growth and inspiring others to realize the shared vision.

**Transforming:** transforming is guiding sustainable change that will allow the individual teams and the organization to be more effective and learn how to change for themselves through leading, facilitation, coaching, facilitating learning, and advising.

## Measuring Your Competency

Skill in a competency area is not a simple binary. Skill mastery is a progression from no knowledge to unconscious mastery. The Agile Coaching Growth Wheel has five growth levels based on the [Dreyfus Model of Skill Acquisition](#).

### Skill Level Definitions

Stage	Description
<b>Beginner</b>	<p>A beginner in the use of Agile Coaching practices has only textbook knowledge with no practical experience. The beginner will typically adhere closely to defined rules or plans and work closely with a more experienced individual. An individual who focuses on learning and is given a chance to practice will generally advance to higher levels of competency in a short period of time.</p> <p>A beginner typically begins to develop the competency by working with a single team and with the support of a more experienced coach or mentor (especially if the single team is part of a larger whole). A beginner with Agile Coaching practices moves to the Advanced Beginner level by showing comprehension of the competencies in the Agile Coaching Growth Wheel, trying to work on their own, taking on a larger task, repeating results, and showing the desire to learn more context.</p>
<b>Advanced Beginner</b>	<p>An advanced beginner, in Agile Coaching practices, has practical experience in the application of the Agile Coaching Growth Wheel competencies. At this level, an individual will be able to interpret and apply straightforward techniques with minimal support from a more experienced coach or mentor and be able to pair to undertake more complex tasks.</p> <p>While an advanced beginner will be capable of identifying complex issues, they will generally only have a limited ability to resolve them. At this level, someone using Agile Coaching practice will typically have difficulty determining which aspects are of greatest importance in a particular situation.</p>

<b>Practitioner</b>	A practitioner can demonstrate working knowledge of all aspects of the Agile Coaching Growth Wheel. An Agile Coaching practitioner will be able to analyze and differentiate various solutions to apply in their work without close supervision and possess the planning skills required to enable them to deal with complex issues or resolve conflicting priorities. At this level, the practitioner should be capable of using repeatable procedures to produce acceptable results and be able to plan towards longer-term goals.
<b>Guide</b>	At the guide level, the individual has in-depth knowledge of the Agile Coaching Growth Wheel competencies. They will be able to synthesize coaching solutions from the existing bodies of knowledge within Agile/Lean and beyond, and tailor them to specific instances in all save the most complex or exceptional of situations and can effectively guide the work of others.  An Agile Coaching Guide will usually be able to intuitively assess the best course of action to take in a given situation and understand how and when to apply guidelines.
<b>Catalyst</b>	A Catalyst has a deep tacit understanding of the Agile Growth Wheel competencies. This individual will be able to modify or alter standards and develop new and innovative approaches to deal with unusual situations. A Catalyst will be able to produce high-quality results and be able to develop a vision of what is possible.

## The Competency Areas

As Agile Coaching professionals we start with a core of self-mastery and then draw on each of the eight competency areas to enhance our practices. It should be noted that none of these competency areas exist in a vacuum and they are expected to all work in conjunction. It is also expected that learning is continuous and ongoing. While there are only five levels of competency progression, there is no upper boundary to the learning possible.

*“I only know that I know nothing. Every time you think you have learned something, you can let go of it to continue learning.” Socrates*



## Start with Ethics

As an agile coaching practitioner ethics are central to your practice when using any of the core skills. This is important for your own personal growth, the good of our clients and the integrity of the profession. You may base your ethical approach on such sources as:

- Agile Alliance: Code of Ethical Conduct for Agile Coaching  
<https://www.agilealliance.org/agilecoachingethics/>
- ICF: code of ethics <https://coachingfederation.org/ethics/code-of-ethics>
- IAF: code of ethics  
<https://www.iaf-world.org/site/pages/statement-values-code-ethics>

Self-mastery and ethics intermingle, the more Self-mastery you have the more you will be in touch with your abilities to uphold your ethical code of conduct, to understand when you have transgressed and to be able to repair the harm.

## Self Mastery

Self-mastery practices involve investing in yourself through reflection, learning, and caring for your well-being. Self-mastery starts with your emotionally intelligent relationship with yourself and others. You understand how Emotional Intelligence supports Relationship Intelligence, Social Intelligence, and the systems you interact with.

A core of Self-Mastery creates the platform for the effective use of all the other Agile Coaching Growth wheel competencies. The level of your self-mastery will influence your potential in the other competencies. To achieve self-mastery, you must focus on:

### Emotional Intelligence

When we grow our Emotional Intelligence, we have access to improved mental health, greater job performance and more effective leadership skills.

- **Self-Awareness** - Know yourself; know your impact. Gaining a fundamental understanding of yourself, your personal cultural beliefs and biases, your strengths and weaknesses, your skills and knowledge, and your values. These are a prerequisite for knowing the impact you have in any situation.
- **Self-Regulation** - You can regulate your emotions and your energetic field consciously. This allows you to choose how you show up, shift in the moment when necessary, and hold appropriate boundaries.

- **Systems impact** - You can understand your impact, determine if it differs from your intention, and fluidly change how you show up to achieve the desired impact. Understanding when you have transgressed a boundary and the skill to repair the relationship.

**Competency Level Definitions:**

Level	Reflection
<p><b>1</b> <b>Beginner</b></p>	<p><b>Self-Awareness</b></p> <ul style="list-style-type: none"> <li>• <b>Identify</b> major emotions, such as joy, sadness, anger and fear in self and others.</li> <li>• <b>Aware</b> that people have their values and belief systems.</li> <li>• <b>Understand</b> the importance of being open to different experiences and new ideas.</li> </ul> <p><b>Self-Regulation</b></p> <ul style="list-style-type: none"> <li>• <b>Understand</b> that self-regulation is valuable in some circumstances.</li> </ul> <p><b>Systems Impact</b></p> <ul style="list-style-type: none"> <li>• <b>Aware</b> of the concept of systems. Individuals are part of a system, and teams exist in a larger system.</li> </ul>
<p><b>2</b> <b>Advanced Beginner</b></p>	<p><b>Self-Awareness</b></p> <ul style="list-style-type: none"> <li>• <b>Recognize</b> a larger set of more nuanced emotional states.</li> <li>• <b>Aware</b> of some of your values and beliefs.</li> <li>• <b>Identify</b> some of your personal strengths and limitations.</li> </ul> <p><b>Self-Regulation</b></p> <ul style="list-style-type: none"> <li>• <b>Demonstrate</b> an understanding when self-regulation is not happening.</li> <li>• <b>Control</b> your emotions and behavior to achieve a specific impact.</li> <li>• <b>Describe</b> some self-regulation techniques that can lead to more successful outcomes.</li> </ul> <p><b>Systems Impact</b></p> <ul style="list-style-type: none"> <li>• <b>Understand</b> common systems that exist in organizational structures.</li> </ul>

	<ul style="list-style-type: none"> <li>● <b>Identify</b> positive and negative impacts that may occur when the systems interact.</li> <li>● <b>Recognize</b> when a system is out of alignment, and know that the system may need assistance in resolution.</li> </ul>
<p><b>3 Practitioner</b></p>	<p><b>Self-Awareness</b></p> <ul style="list-style-type: none"> <li>● <b>Recognize</b> and name your emotional state.</li> <li>● <b>Recognize</b> that you have blind spots and begin to identify them.</li> <li>● <b>Identify</b> most of your values and beliefs.</li> </ul> <p><b>Self-Regulation</b></p> <ul style="list-style-type: none"> <li>● <b>Choose</b> your response in most situations.</li> <li>● <b>Able</b> to match your emotional state to the energetic field sometimes.</li> <li>● <b>Plan</b> in advance for some complex scenarios.</li> </ul> <p><b>Systems Impact</b></p> <ul style="list-style-type: none"> <li>● <b>Understand</b> systemic values and the impact of your values on the system.</li> <li>● <b>Recognize</b> complex issues within single systems, and work to resolve some</li> <li>● <b>Recognize</b> the impact of systems within systems (i.e. teams within a department) and can work to align those healthily.</li> </ul>
<p><b>4 Guide</b></p>	<p><b>Self-Awareness</b></p> <ul style="list-style-type: none"> <li>● <b>Understand</b> and anticipate your triggers.</li> <li>● <b>Understand</b> your own values system and be aware that it is a choice about whether to live by them.</li> <li>● <b>Evaluate</b> learning from your experiences and social interaction.</li> </ul> <p><b>Self-Regulation</b></p> <ul style="list-style-type: none"> <li>● <b>Regulate</b> your emotions and energetic field in a conscious way when appropriate.</li> <li>● <b>Choose</b> how you show up, shift in the moment when necessary, and hold appropriate boundaries.</li> <li>● <b>Understand</b> constant self-regulation can impact your mental health and have strategies to help mitigate this.</li> </ul> <p><b>Systems Impact</b></p>

	<ul style="list-style-type: none"> <li>● <b>Assess</b> systems intuitively and know what the best course of action is to take in any given situation.</li> <li>● <b>Understand</b> clearly the difference between your intention and impact, and know when they differ.</li> </ul>
<b>5 Catalyst</b>	<p><b>Self-Awareness</b></p> <ul style="list-style-type: none"> <li>● <b>Know</b> yourself deeply and your emotional state at any given moment.</li> <li>● <b>Choose</b> intentionally whether or not to live your values and beliefs.</li> </ul> <p><b>Self-Regulation</b></p> <ul style="list-style-type: none"> <li>● <b>Shift</b> your emotional state at will.</li> <li>● <b>Choose</b> how to respond in any given situation.</li> </ul> <p><b>Systems Impact</b></p> <ul style="list-style-type: none"> <li>● <b>Understand</b> the breadth of ways to lead and choose the appropriate stance in the moment.</li> <li>● <b>Work</b> with systems to help them evolve.</li> </ul>

## Balance

Taking time for yourself and seeking balance, learning how to integrate all parts of your life healthfully. It's also important to be aware when you are out of balance and be able to re-balance when needed. Balance encompasses understanding your physical, mental, and spiritual well-being. It also incorporates the intersection of work and play, and the cultivation of supportive structures, communities, and interests in your life.

### Competency Level Definitions:

Level	Reflection
<b>1 Beginner</b>	<ul style="list-style-type: none"> <li>● <b>Recognize</b> the various aspects of your life that require energy and attention.</li> <li>● <b>Understand</b> that sometimes you may be out of balance but not know how to achieve balance.</li> <li>● <b>Contrast</b> dysfunctional behaviors versus healthy behaviors.</li> </ul>
<b>2</b>	<ul style="list-style-type: none"> <li>● <b>Create</b> some healthy boundaries.</li> <li>● <b>Build</b> close personal, supportive structures.</li> </ul>

<b>Advanced Beginner</b>	<ul style="list-style-type: none"> <li>● <b>Recognize</b> the importance of balance in your mental health.</li> </ul>
<b>3 Practitioner</b>	<ul style="list-style-type: none"> <li>● <b>Understand</b> the intersection between work and play and how to move between them.</li> <li>● <b>Recognize</b> when you are out of balance quickly and regain balance.</li> <li>● <b>Build</b> a wider support system, including professionals or organizations and personal support.</li> <li>● <b>Understand</b> when you have transgressed a boundary and can make the repair with the other party.</li> </ul>
<b>4 Guide</b>	<ul style="list-style-type: none"> <li>● <b>Balance</b> all areas of life consistently, including work, play, family and community, physical health, and spiritual or emotional work.</li> <li>● <b>Recognize</b> immediately when you are out of balance and can recover on your own or with the help of support systems.</li> <li>● <b>Hold</b> professional and personal boundaries appropriately and in congruence with all professional ethical guidelines.</li> </ul>
<b>5 Catalyst</b>	<ul style="list-style-type: none"> <li>● <b>Encourage</b> others to consider the importance of balance</li> <li>● <b>Create</b> a tool or technique that helps provide balance to your life and others.</li> </ul>

### Personal Transformation

Be the change you want to see by modeling the transformation you want others to experience. Valuing and investing in your personal growth through reflection, seeking, learning, and integrating all you have learned. You also work with peers, mentors, or coaching supervisors to accelerate your skills and mastery. You understand that your transformational journey is never complete.

#### Competency Level Definitions:

Level	Reflection
<b>1 Beginner</b>	<ul style="list-style-type: none"> <li>● <b>Recognize</b> that you may benefit from learning new skills and growing your competencies.</li> </ul>

	<ul style="list-style-type: none"> <li>● <b>Create</b> a clear understanding of where you have growth opportunities.</li> </ul>
<b>2 Advanced Beginner</b>	<ul style="list-style-type: none"> <li>● <b>Learn</b> from others who have skills or abilities that you desire for yourself.</li> <li>● <b>Invest</b> in personal growth through education, mentorship, introspection, etc.</li> </ul>
<b>3 Practitioner</b>	<ul style="list-style-type: none"> <li>● <b>Recognize</b> that personal transformation is an ongoing activity without end.</li> <li>● <b>Engage</b> a mentor/coach.</li> <li>● <b>Aware</b> of your growth opportunities.</li> <li>● <b>Aware</b> that transformation impacts not just what you know but also who you are.</li> </ul>
<b>4 Guide</b>	<ul style="list-style-type: none"> <li>● <b>Weave</b> personal growth and transformation into your daily life.</li> <li>● <b>Assist</b> others on their transformation journeys through mentoring and coaching.</li> </ul>
<b>5 Catalyst</b>	<ul style="list-style-type: none"> <li>● <b>Analyze</b> your transformational journey and share it with others.</li> <li>● <b>Impact</b> others through your transformational journey.</li> <li>● <b>Develop</b> practices that help others on their personal transformation journey.</li> </ul>

## Agile and Lean Practitioner

As an Agile and Lean Practitioner, you deeply understand Agile and Lean frameworks and principles. This includes the practices, underlying principles, and values (mindset). Knowledge and mindset are not enough to be an Agile Leader. You must also be able to apply this knowledge and mindset and apply it with real teams, in real organizations, innovating practices consistent with the underlying principles and values, and apply it appropriately with the goal of helping organizations to deliver continuous and sustainable value to their customers.

Agile was originally coined as part of the Manifesto for Agile Software Development and defined by 4 values and 12 guiding principles. The idea of agility has transcended the Manifesto and evolved beyond software to meet a wider organizational context. It still retains a core philosophy seen clearly in that Manifesto.

Lean originates from Lean Manufacturing and Lean Product Development, although the word Lean has been subsequently used in many contexts. Many ideas aligned with Agile and Lean concepts can be seen in many modern Frameworks, Methods and Practices for delivering value.

## **Agile and Lean Mindset**

Being an Agile and Lean practitioner, you start with a deep understanding of its values and principles. This allows us to apply frameworks, methods and practices in the way they were intended and then to experiment with empirical evidence, to meet an ever-changing world. Remaining true to the underlying paradigm allows us to create a shared system where individuals, teams, and organizations can grow and flourish as self-managed entities. This allows for the continuous delivery of sustainable value to the customer.

The Agile and Lean values and principles guide our thinking and actions when working to solve complex or complicated situations and even to move from chaos to complex. The foundations of Agile and Lean are found in the Manifesto for Agile Software Development, Lean Manufacturing (including the Toyota Production System), Lean Product Development and other parallel practices and concepts of the late 20th century (see the resources section for specific references).

We broadly classify these many values and principles into the three categories listed below.

- **Customer Satisfaction**

Some examples are:

- Delighting customers by collaborating to deliver tangible value regularly.
- Build products that can adapt to the needs of the customer.
- Delivering high-quality products that improve the lives of the customer.

- **Collaborative Interactions**

Some examples of this are:

- Trusting and supporting people to work together in small self-managing teams.
- Everyone involved in the delivery of value working together daily.
- Fostering environments of mutual respect, openness and accountability.

- **Continuous Improvement**

Some examples of this are:

- Continuously improve the way we work.
- Optimizing our organizations for flow by eliminating waste.

- Challenging each other to grow through continuous learning.

These broad categories help to understand how your overall Agile and Lean mindset can be used to approach the Frameworks and Practices. You need a balance of values from all these categories to be a successful Agile leader.

**Competency Level Definitions:**

Level	Reflection
<b>1</b> <b>Beginner</b>	<ul style="list-style-type: none"> <li>● <b>Describe</b> the Agile Manifesto and its principles.</li> <li>● <b>Aware</b> of Lean Thinking and its origins.</li> <li>● <b>Explain</b> the core values and principles of at least one execution framework.</li> </ul>
<b>2</b> <b>Advanced Beginner</b>	<ul style="list-style-type: none"> <li>● <b>Discuss</b> how your behaviors relate to Agile principles.</li> <li>● <b>Explain</b> how the values and principles of the Agile Manifesto are present in how your team works.</li> <li>● <b>Recognize</b> when decisions help or hinder the adoption of agile principles.</li> <li>● <b>Explain</b> the core concepts of Lean Thinking and how they can be applied.</li> <li>● <b>Associate</b> Lean principles and Agile approaches with each other.</li> <li>● <b>Demonstrate</b> knowledge of how the principles of at least one execution framework are aligned with the values and principles of Agile and Lean.</li> </ul>
<b>3</b> <b>Practitioner</b>	<ul style="list-style-type: none"> <li>● <b>Contrast</b> two examples where you applied an empirical mindset.</li> <li>● <b>Apply</b> at least 3 lean principles, <b>adapt</b> them to a given context and <b>describe</b> the lasting benefit to the client.</li> <li>● <b>Contrast</b> Lean Production/Process and Lean Thinking.</li> <li>● <b>Analyze</b> your fulfilment of the Agile and Lean mindset and identify how you can improve.</li> <li>● <b>Illustrate</b> at least two examples of how you have actively applied Agile and Lean Mindsets in your work.</li> <li>● <b>Create</b> clear and simple explanations for how Agile and Lean principles can help your teams and organizations to continuously deliver sustainable value.</li> </ul>



<p><b>4</b> <b>Guide</b></p>	<ul style="list-style-type: none"> <li>● <b>Describe</b> an experience in which there is no obvious resolution to an impediment, requiring you to leverage an Agile and Lean mindset to help a team or organization select possible solutions.</li> <li>● <b>Appraise</b> practices adopted at a team and organization level and analyze how they do or do not support the continuous delivery of sustainable value.</li> <li>● <b>Apply</b> at least two ways to provide growth to self, other coaches and practitioners in the Agile community.</li> <li>● <b>Apply</b> at least 3 lean principles, <b>adapt</b> them to a given context and <b>describe</b> the lasting benefit to the client.</li> </ul>
<p><b>5</b> <b>Catalyst</b></p>	<ul style="list-style-type: none"> <li>● <b>Assess</b> new principles related to the continuous delivery of sustainable value and evaluate how they might or might not fit within the current umbrella of Agile and Lean values and principles.</li> <li>● <b>Create</b> and contribute new thinking to the community relating to the spirit and mindset of Agile and Lean.</li> <li>● Sought out to <b>speak</b> at conferences and other community events on Agile and Lean related topics.</li> <li>● Seen as a <b>leader</b> in the Agile and Lean community and beyond.</li> </ul>

## Frameworks and Practices

Being an Agile and Lean Practitioner, you will have a deep understanding of many frameworks, methods and practices that support teams and the wider organization in the continuous delivery of value. Using these Frameworks and Practices creates healthy habits that lead to changes in behavior and eventually to a change in mindset and culture. These changes benefit the individual, the team, the organization, and even the world.

- **Frameworks, Methods, and Approaches** provide a minimal set of boundaries that allow a team and/or organization to learn to be Agile and sustainably deliver tangible value. Below is an example list of frameworks and methods you could use in your work with individuals, teams, and organizations.  
*Note: this is not a definitive list, and as you gain experience, you will experiment with many others and even adapt approaches from outside of the Agile and Lean family.*

- Scrum, Kanban, Feature Driven Development, DevOps, eXtreme Programming, Lean Start-up, Lean Product Development, Theory of Constraints, Systems and Complexity thinking provide some of the core frameworks for execution.
  - LeSS, Nexus, SAFe, and Scrum@Scale are some examples of scaling/descaling frameworks.
  - Holacracy, Humanocracy, Sociocracy 3.0, and other approaches, are social structures that organizations can use to experiment with patterns that help engage individuals, teams and organizations with a goal of creating a diverse and inclusive collaborative environment.
  - Business Model Canvas, Value Proposition Canvas, Lean Canvas, and Profit Streams™ Canvas are examples of system modeling frameworks that enable creation of holistic solutions.
  - Innovation Games and Gamestorming are examples of decision-making frameworks that allow groups to advance concretely to the next decision.
- **Practices** - Provide techniques and tools that enhance the use of Frameworks and Methods. There are many practices that support Agile and Lean ways of working. Depending on context and team maturity, the practices used will change over time. Some examples of common practices are:
    - User Stories, User Story, Impact, and Empathy Mapping, Product Vision Generation, Collaborative Roadmapping
    - Estimation, Agile and Lean Metrics, Information radiators
    - Value stream mapping, Causal Loop Diagrams
    - Kaizen events, Large-scale retrospectives
    - Test-Driven Development, Pairing, Refactoring, Automation
    - Communities of Practice, Learning Dojo's

Your challenge is to discover and create new practices and to have fun experimenting with them.

**Competency Level Definitions:**

Level	Reflection
<b>1 Beginner</b>	<p><b>Frameworks/Methods and Approaches</b></p> <ul style="list-style-type: none"> <li>● <b>Describe</b> at least one Agile approach and how it relates to the Agile Manifesto.</li> <li>● <b>Outline</b> the historical development of Agile.</li> </ul> <p><b>Practices</b></p>

	<ul style="list-style-type: none"> <li>● <b>Explain</b> at least three Agile practices commonly used by Agile teams.</li> <li>● <b>List</b> one or two Lean practices that are helpful for individual Agile teams.</li> </ul>
<p><b>2</b> <b>Advanced Beginner</b></p>	<p><b>Frameworks/Methods and Approaches</b></p> <ul style="list-style-type: none"> <li>● <b>Identify</b> the knowledge and skills to maintain the distinctions between Agile and "alternative" ways of working.</li> <li>● <b>Apply</b> an Agile or Lean framework or method, using all of its elements through a complete cycle.</li> <li>● <b>Describe</b> at least three Lean/Agile development frameworks/methods and explain their value.</li> </ul> <p><b>Practices</b></p> <ul style="list-style-type: none"> <li>● <b>Explain</b> how at least three practices are aligned (or not) with the values and principles of the Agile Manifesto.</li> <li>● <b>Demonstrate</b> how an Agile practice could improve a current way of working for a team.</li> <li>● <b>Explain</b> how you have helped a team increase the quality of delivery by continually improving its practices.</li> </ul>
<p><b>3</b> <b>Practitioner</b></p>	<p><b>Frameworks/Methods</b></p> <ul style="list-style-type: none"> <li>● <b>Demonstrate</b> how you have guided a team to an Agile or Lean Framework.</li> <li>● <b>Apply</b> at least two frameworks or methods in multiple situations.</li> <li>● <b>Differentiate</b> the various scaling frameworks and how they may or may not work in a given situation.</li> </ul> <p><b>Practices</b></p> <ul style="list-style-type: none"> <li>● <b>Analyze</b> new Agile or Lean practices methods and assess how they could or could not be applied within current frameworks.</li> <li>● <b>Integrate</b> at least three Agile development practices with Lean practices.</li> <li>● <b>Apply</b> Agile or Lean practices beyond the team (e.g. multi-team scaling, organizational design, etc.).</li> </ul>

<p><b>4</b> <b>Guide</b></p>	<p><b>Frameworks/Methods</b></p> <ul style="list-style-type: none"> <li>• Helps the team <b>evaluate</b> the process that is most suitable for them.</li> <li>• <b>Appraise</b> a real situation in which they have advised a client to apply XP, Lean, or a non-Agile approach instead of Scrum. Can <b>describe</b> the reasoning behind their advice.</li> <li>• Able to <b>apply</b> many frameworks and able to <b>adapt</b> to different situations.</li> </ul> <p><b>Practices</b></p> <ul style="list-style-type: none"> <li>• <b>Evaluate</b> different practices and evolve them to meet the organizational need and still be aligned with Agile and Lean values and principles.</li> <li>• <b>Facilitate</b> experimentation and learning with practices across multiple systems.</li> <li>• <b>Design</b> framework(s) that can help teams or organizations to resolve impediments in which there are no obvious solutions</li> </ul>
<p><b>5</b> <b>Catalyst</b></p>	<ul style="list-style-type: none"> <li>• <b>Creates</b> and shares new approaches to the continuous delivery of sustainable value, that maintain the spirit of Agile / Lean values and principles.</li> <li>• <b>Assess</b> and communicate emerging practices and frameworks for how they might contribute to organizations ability to deliver sustainable value.</li> <li>• Sought out to <b>speak</b> at conferences and other community events on Agile and Lean related topics.</li> <li>• Seen as a <b>leader</b> in the Agile and Lean community and beyond.</li> </ul>

## Serving

While servant leadership is a timeless concept, the phrase “servant leadership” was coined by Robert K. Greenleaf in *The Servant as Leader*, an essay that he first published in 1970. In that essay, Greenleaf said:

“The servant-leader is a servant first... It begins with the natural feeling that one wants to serve, to serve first. Then conscious choice brings one to aspire to lead. That person is sharply different from one who is a leader first, perhaps because of the need to assuage an unusual power drive or to acquire material possessions... The leader-first and the servant-first are two extreme types. Between them, there are shadings and blends that are part of the infinite variety of human nature.

“The difference manifests itself in the care taken by the servant first to make sure that other people’s highest priority needs are being served. The best test, and difficult to administer, is: Do those served grow as persons? Do they, while being served, become healthier, wiser, freer, more autonomous, more likely themselves to become servants? And, what is the effect on the least privileged in society? Will they benefit or at least not be further deprived?”.

A servant-leader focuses primarily on the growth and well-being of people and the communities to which they belong. While traditional leadership generally involves the accumulation and exercise of power by one at the “top of the pyramid,” servant leadership is different. The servant-leader shares power and puts the needs of others first, and helps people develop and perform as highly as possible.

Being a servant-leader is the very essence of agile coaching.

### **Serving the Business**

Serving the business is about helping that business to focus on outcomes over output, product over project, with a constant eye on the creation of an indefinitely sustainable business.

You help businesses towards sustainable profit by creating outcomes that delight and provide value to their customers by focusing on customer needs and leveraging Agile/Lean practices to accelerate learning and value delivery. They have the knowledge and skills that serve the business in several ways, including their ability to facilitate, teach, advise and support:

- **Understanding Customers** - Customer Research and Product Discovery.

- **Purpose & Strategy** - developing practical product strategies, product planning, forecasting, and product economics.
- **Product Backlog Effectiveness:** - creating a Product Backlog that focuses on what is needed to improve the product through valuable outcomes. Ensuring that there is organizational alignment from concept to execution which clearly defines the value and order of the work to be done.
- **Supporting Business Stakeholders** - supports the learning and growth of the Product Owner and other business stakeholders.

**Competency Level Definitions:**

Level	Reflection
<p><b>1</b> <b>Beginner</b></p>	<p><b>Understanding Customers</b></p> <ul style="list-style-type: none"> <li>● <b>Describe</b> at least one technique to prioritize conflicting customer (or user) needs.</li> <li>● <b>Describe</b> at least three aspects of product discovery and identify how each contributes to successful product outcomes.</li> <li>● <b>List</b> at least three approaches to connect the team directly to customers and users.</li> </ul> <p><b>Purpose &amp; Strategy</b></p> <ul style="list-style-type: none"> <li>● <b>Outline</b> an approach for creating a product vision.</li> <li>● <b>List</b> at least three approaches to communicating progress with stakeholders.</li> <li>● <b>Describe</b> the relationship between outcome and output.</li> </ul> <p><b>Product Backlog Effectiveness</b></p> <ul style="list-style-type: none"> <li>● <b>Explain</b> at least two approaches to identify small, valuable slices of work to maximize outcomes.</li> <li>● <b>Describe</b> at least one approach to making sure work has clear outcomes.</li> <li>● <b>Describe</b> at least 4 properties of a well-structured Product Backlog.</li> </ul> <p><b>Supporting Business Stakeholders</b></p> <ul style="list-style-type: none"> <li>● <b>Describe</b> at least two stakeholder behaviors that support the team’s success and at least two behaviors that do not support the team’s success.</li> </ul>

**2**  
**Advanced**  
**Beginner**

### **Understanding Customers**

- **Practice** at least one technique to support teams learning by connecting them directly to customers and users.
- **Examine** the impact of product work on customers, stakeholders, and/or the organization.
- **Compare** at least two approaches to validating assumptions to inspect and adapt.

### **Purpose & Strategy**

- **Discuss** a real-world example of how product strategy is operationalized and evolves in an Agile organization.
- **Practice** at least one technique to visualize and communicate product strategy, product ideas, features, and/or assumptions.
- **Facilitate** the creation (or refinement) of the product vision between stakeholders, the Product Owner, and the team.

### **Product Backlog Effectiveness**

- **Apply** at least one technique to assist the Product Owner in creating a smooth flow of work, ensuring that enough Product Backlog items of the right type are “ready” for the upcoming period of work.
- **Facilitate** at least two techniques for moving from a product vision to a Product Backlog. Show how these can be organized, ordered, and filtered within a Product Backlog to link to product goals or strategies.
- **Apply** at least two techniques to model value and at least two techniques to measure value.

### **Supporting Business Stakeholders**

- **Explain** agile to business stakeholders.
- **Build** a coaching relationship with at least one business stakeholder and help them become more effective.
- **Teach** business stakeholders different practices for making decisions aligned with product strategy.

<p><b>3</b> <b>Practitioner</b></p>	<p><b>Understanding Customers</b></p> <ul style="list-style-type: none"> <li>● <b>Mentor</b> business stakeholders in integrating product discovery into development.</li> <li>● <b>Facilitate</b> at least three techniques for customer research or product discovery.</li> <li>● <b>Facilitate</b> the selection of an appropriate experiment to test a hypothesis and evaluate the results.</li> </ul> <p><b>Purpose &amp; Strategy</b></p> <ul style="list-style-type: none"> <li>● <b>Facilitate</b> the development of a business model and competitive analysis for a product idea.</li> <li>● <b>Apply</b> at least two methods to calculate a product's expected outcome or economic results.</li> <li>● <b>Explain</b> an iterative and incremental investment model for product development.</li> </ul> <p><b>Product Backlog Effectiveness</b></p> <ul style="list-style-type: none"> <li>● <b>Assess and recommend</b> improvements for how teams and/or organizations emphasize outcomes over output and how this is reflected in a Product Backlog.</li> <li>● <b>Support</b> the Product Owner in selecting an appropriate value-creation strategy, using product data to make an informed decision on what to build next.</li> <li>● <b>Apply</b> techniques to structure and order single-team and multi-team product backlogs to create transparency and understanding.</li> </ul> <p><b>Supporting Business Stakeholders</b></p> <ul style="list-style-type: none"> <li>● <b>Facilitate</b> Lean experiments.</li> <li>● <b>Build</b> a coaching relationship with multiple Product Owners and business stakeholders to help them become more effective.</li> </ul>
<p><b>4</b> <b>Guide</b></p>	<p><b>Understanding Customers</b></p> <ul style="list-style-type: none"> <li>● <b>Advise</b> the business on market segmentation.</li> <li>● <b>Guide</b> the business to identify market opportunities.</li> <li>● <b>Assess</b> at least two approaches for validating assumptions and guide the client in using them appropriately.</li> </ul> <p><b>Purpose &amp; Strategy</b></p> <ul style="list-style-type: none"> <li>● <b>Facilitate</b> product kickoffs in almost any situation, engaging multiple customers, stakeholders, leadership, and team members.</li> </ul>



	<ul style="list-style-type: none"> <li>● <b>Advise</b> an organization on developing a business vision and strategy.</li> <li>● <b>Guide</b> the business to decide which initiatives to invest in to create a shared understanding of value creation across the organization.</li> </ul> <p><b>Product Backlog Effectiveness</b></p> <ul style="list-style-type: none"> <li>● <b>Advise</b> the organization on prioritising demand across the business.</li> <li>● <b>Facilitate</b> an initiative from concept through to value recognition.</li> <li>● <b>Change</b> the focus on initial success to be outcome-focused (economic, social, and environmental value).</li> </ul> <p><b>Supporting Business Stakeholders</b></p> <ul style="list-style-type: none"> <li>● <b>Respect</b> any previous coaching done with business stakeholders and use this to continually improve how to serve others.</li> <li>● <b>Guide</b> a product community in their growth.</li> <li>● <b>Teach</b> business stakeholders Agile and Lean concepts so they can bring the right products to the market at the right time.</li> </ul>
<p><b>5 Catalyst</b></p>	<ul style="list-style-type: none"> <li>● <b>Seen</b> as a Leader in the community on topics such as <ul style="list-style-type: none"> <li>○ Understanding Customers</li> <li>○ Purpose &amp; Strategy</li> <li>○ Managing the Backlog</li> <li>○ Coaching Business Stakeholders</li> </ul> </li> <li>● <b>Contribute</b> new thinking to the community relating to product and business matters.</li> <li>● <b>Inspire</b> others on the need for organizations to exist beyond traditional economic value and to consider the wider ethical, environmental and social implications of product development and strategy.</li> </ul>

**Serving the Team**

A team is more than a collection of individuals, it is a human system with its own characteristics, needs and growth potential. Moments of conflict or collaboration difficulty should be seen as human systems dynamics, rather than solely personal to the individuals involved.

You help teams become the best self-managed entities they can be by leveraging the interlinked competencies of the Agile Coaching Growth Wheel.

A team has the knowledge and skills to complete all aspects of creating usable value in short and frequent empirical feedback loops. If they do not have these skills, as an Agile leader, you need to foster the environment for the team to learn or acquire the knowledge and skills.

This section covers a more focused view of specifically serving the team through a journey to high performance. This is done with knowledge, skills, and experiences that serve the team, including things such as:

- **Team effectiveness** - Is the capacity of a team to accomplish its shared outcome-based goals and objectives.
- **Team dynamics** - The behavioral relationships of conscious and unconscious forces that influence the direction of a team. This includes how the team communicates, their capacity for self-management, accountability, transparency, conflict navigation, emotions and how they embrace diversity.
- **Team Formation and Sustainability** - Studies show (Hackman, 2011) that 90% of the variation in team effectiveness is due to team design (60%) and team launch (30%), so the start (or restart) is really important. This should include elements such as helping the team establish their purpose, create a culture, align on vision, set up their work environment and establish team agreements and/or ground rules.

**Competency Level Definitions:**

Level	Reflection
<p><b>1</b> <b>Beginner</b></p>	<p><b>Team Effectiveness</b></p> <ul style="list-style-type: none"> <li>● <b>List</b> at least three attributes of effective teams</li> <li>● <b>Describe</b> three challenges facing a self-managing team.</li> <li>● <b>Describe</b> the importance of creating a continuous learning culture in a team.</li> </ul> <p><b>Team Dynamics</b></p> <ul style="list-style-type: none"> <li>● <b>Identify</b> the advantages of diversity within the team</li> <li>● <b>Understand</b> the importance of conflict in a team.</li> </ul> <p><b>Launching Teams</b></p>

	<ul style="list-style-type: none"> <li>● <b>Understand</b> how starting an agile team differs from kicking off a traditional project.</li> <li>● <b>Identify</b> characteristics of a successful team launch.</li> </ul>
<p><b>2</b> <b>Advanced</b> <b>Beginner</b></p>	<p><b>Team Effectiveness</b></p> <ul style="list-style-type: none"> <li>● <b>Discuss</b> three ways the organization (culture, leadership, policies, structures etc.) can impact team effectiveness.</li> <li>● <b>Describe</b> at least three characteristics of a high-performing team and how those characteristics relate to an agile mindset.</li> <li>● <b>Discuss</b> at least three typical impediments for a team and describe at least one way to address them.</li> </ul> <p><b>Team Dynamics</b></p> <ul style="list-style-type: none"> <li>● <b>Describe</b> when a constructive interaction moves to destructive conflict.</li> <li>● <b>Apply</b> at least two techniques to foster greater self-management within teams.</li> <li>● <b>Explain</b> at least one multi-stage model for team formation and development. Illustrates what is important for a new team.</li> </ul> <p><b>Launch a Team</b></p> <ul style="list-style-type: none"> <li>● <b>Facilitate</b> the creation of team purpose, roles, agreements and alignment during the start-up of a team.</li> </ul>

<p><b>3</b> <b>Practitioner</b></p>	<p><b>Team Effectiveness</b></p> <ul style="list-style-type: none"> <li>● <b>Describe</b> how you can help a team overcome at least three challenges to be more effective.</li> <li>● <b>Analyze</b> at least two ways you have evolved a team's culture.</li> <li>● <b>Appraise</b> at least two models or techniques for developing and improving team effectiveness.</li> </ul> <p><b>Team Dynamics</b></p> <ul style="list-style-type: none"> <li>● <b>Surface</b> conflict positively to improve the team's competency in dealing with conflict.</li> <li>● <b>Apply</b> at least three techniques for addressing team dysfunctions in different teams.</li> <li>● <b>Describe</b> how teams are unique and will require different approaches to how they work and will need to be coached differently.</li> </ul> <p><b>Launching a Team</b></p> <ul style="list-style-type: none"> <li>● <b>Assess</b> and then <b>address</b> missing skills or capabilities within a team that will take it towards high performance.</li> <li>● <b>Integrate</b> learnings from other teams and take a whole system approach to the launch of a new Agile team, starting with 'good enough for now'.</li> <li>● <b>Facilitate</b> the launch of a new Agile team and explain the learnings from experience.</li> </ul>
<p><b>4</b> <b>Guide</b></p>	<p><b>Team Effectiveness</b></p> <ul style="list-style-type: none"> <li>● <b>Integrate</b> different team models and demonstrate how you have used these to increase the team's outcomes.</li> <li>● <b>Contrast</b> different techniques used to increase team effectiveness across multiple teams with who you have worked and evaluate the effects on team results.</li> <li>● <b>Teach</b> teams how to self-adapt without the need for a coach.</li> </ul> <p><b>Team Dynamics</b></p> <ul style="list-style-type: none"> <li>● <b>Contrast</b> the relationships across teams with whom you have worked, and integrate learning into your coaching interventions.</li> </ul> <p><b>Launching a Team</b></p> <ul style="list-style-type: none"> <li>● <b>Apply</b> a coaching approach to the formation and development of teams and the challenges commonly encountered while introducing Agile.</li> </ul>

	<ul style="list-style-type: none"> <li>● <b>Guide</b> an organization in changing the environment to provide the best possible start to a team.</li> <li>● <b>Support</b> an organization in articulating a clear vision and goals that can support teams.</li> </ul>
<p><b>5 Catalyst</b></p>	<ul style="list-style-type: none"> <li>● <b>Recognized</b> as a Leader in the community on topics such as <ul style="list-style-type: none"> <li>○ Team Effectiveness</li> <li>○ Team Dynamics</li> <li>○ Launching Teams</li> </ul> </li> <li>● <b>Respected</b> author and authority in Servant Leadership.</li> <li>● <b>Write</b> about your analysis of research into team effectiveness.</li> </ul>

## Coaching

Coaching is partnering with a person, team, or organization (client) in a creative process to help the client reach their goals by unlocking their potential and understanding. A coach can accept the client as a whole, creative and competent person, and serve their agenda ethically.

Coaching has many different definitions; for example, Whitmore, J. (1992) simply states: “Coaching is unlocking a person’s potential to maximize their own performance. It is helping them to learn rather than teaching them.” When working with an individual or system, we are helping them move forward in some way, helping them grow. Coaching people and systems are professions in their own right, and we encourage you to dig deeper into coaching as a profession using the links provided in the resource section. Professional bodies, such as the International Coaching Federation (ICF) and the European Mentoring and Coaching Council (EMCC), support the overall principles of professional coaching.

Someone using Agile Coaching practices needs a strong foundation in coaching as the coachee often needs someone to create a constructive space to broaden and deepen their thinking to where they need to go. An essential aspect of using coaching practices is understanding when/when not to use a coaching approach.

Ethics are paramount to coaching. As an Agile Coach, you often provide an agenda for the client. The coach will always need to be aware of the type of coaching stance they are in to be within the guidelines of the different ethical standards.

### Coaching Mindset

Being a Coach, you will have the beliefs, values and attitudes to take a coaching stance and work effectively with individuals and systems. It can be difficult for beginners to enter a coaching stance as you must often let go of skills and behaviors that have made you an expert. Below is a list of some attitudes and beliefs that a great coach will hold when taking a coaching stance:

- **Coaching Ethics** - Able to root your coaching mindset in ethics. Ethics are always in play when you are in your coaching stance.
  - **Individual Coaching Ethics** - These ethics speak to what ethics are in play for individual coaching.
  - **System/Agile Coaching Ethics** - These ethics speak to what ethics are in play in System/Team and Agile Coaching.

- **Growth Mindset** - Develop an authentic, open, curious, flexible mindset and honoring the client's agenda.
  - **Authenticity** - You behave ethically and have a strong belief and values system that holds the client in a non-judgemental and safe space.
  - **Learning** - You recognize that a learning mindset is important to both the coach's growth and the client's growth
  - **Creating** the right container to help unlock the coachee's potential
  
- **Belief in the Coachee** - that the client is capable and whole and growth is possible. Clients can achieve their own goals and do not need “fixing”.
  - **Neutrality** - You respect the client's perspective and needs without judgment. You do not influence and, instead, hold the client's agenda. You reduce client dependence and work to enable the client to move forward independently.
  - **Adaptability** - You are willing to let go of judgment and adapt to what the client needs in the moment.
  - **Coachee Focus** - You believe that others learn best for themselves. People are naturally resourceful and whole with unlimited potential. They come to work to do the best they can and do not need rescuing from the decisions they make.

**Competency Level Definitions:**

Level	Reflection
<b>1</b> <b>Beginner</b>	<p><b>Coaching Ethics</b></p> <ul style="list-style-type: none"> <li>● <b>Summarize</b> the different types and levels of coaching ethics and can speak to them.</li> <li>● <b>Demonstrate</b> honesty and integrity in all interactions.</li> <li>● <b>Use</b> language appropriate and respectful to clients.</li> </ul> <p><b>Growth Mindset</b></p> <ul style="list-style-type: none"> <li>● <b>Explain</b> what psychological safety is and why it is important.</li> <li>● <b>Recognize</b> the power of coaching and the impact of coaching for themselves.</li> <li>● <b>Define</b> what coaching is and what it may accomplish.</li> </ul> <p><b>Belief in the Coachee</b></p> <ul style="list-style-type: none"> <li>● <b>Recognize</b> that growth is possible for the client.</li> <li>● <b>Understand</b> the importance of the client leading the direction of the conversation.</li> </ul>

<p><b>2</b> <b>Advanced Beginner</b></p>	<p><b>Coaching Ethics</b></p> <ul style="list-style-type: none"> <li>● <b>Understand</b> where to apply ethics when coaching in some scenarios.</li> <li>● <b>Maintain</b> the distinctions between coaching, consulting, psychotherapy and other support professions.</li> <li>● <b>Understand</b> that they may not have all the required skills and will refer coachees to other professionals as needed.</li> </ul> <p><b>Growth Mindset</b></p> <ul style="list-style-type: none"> <li>● <b>Demonstrate</b> the power of coaching by having regular coaching yourself.</li> <li>● <b>Able</b> to stay in the coaching mindset most of the time.</li> <li>● <b>Understand</b> that their clients are naturally creative, resourceful, whole and have unlimited potential. Therefore, they have the means to solve their challenges.</li> </ul> <p><b>Belief in the Coachee</b></p> <ul style="list-style-type: none"> <li>● <b>Able</b> to tease out the client's agenda and focus the session by keeping the client on track to their agenda.</li> <li>● <b>Recognize</b> that a coaching conversation is to help a client deepen/broaden their thinking and enable growth.</li> <li>● <b>Challenge</b> the client to take steps to promote their learning and growth.</li> </ul>
<p><b>3</b> <b>Practitioner</b></p>	<p><b>Coaching Ethics</b></p> <ul style="list-style-type: none"> <li>● <b>Able</b> to recognize when ethics are not met and takes corrective actions to repair.</li> <li>● <b>Understand</b> where to apply ethics in most scenarios.</li> <li>● <b>Refer</b> clients to other kinds of support professionals, as appropriate.</li> </ul> <p><b>Growth Mindset</b></p> <ul style="list-style-type: none"> <li>● <b>Demonstrate</b> the power of coaching by doing regular reflective practices and regular coaching supervision or peer support.</li> <li>● <b>Engage</b> in ongoing training and learning as a coach.</li> <li>● <b>Describe</b> the differences between coaching an individual or a system.</li> <li>● <b>Exhibit</b> curiosity and stays out of the judgment mindset.</li> </ul>



	<p><b>Belief in the Coachee</b></p> <ul style="list-style-type: none"> <li>● <b>Practice</b> providing acknowledgements of positive changes.</li> <li>● <b>Able</b> to enable the client to move forward independently.</li> <li>● <b>Demonstrate</b> self-awareness and intuition to help move the client forward.</li> </ul>
<p><b>4 Guide</b></p>	<p><b>Coaching Ethics</b></p> <ul style="list-style-type: none"> <li>● <b>Mentor</b> others about ethics and when and where to apply them.</li> <li>● <b>Able</b> to resolve ethical dilemmas.</li> </ul> <p><b>Growth Mindset</b></p> <ul style="list-style-type: none"> <li>● <b>Foster</b> a growth mindset in others.</li> <li>● <b>Create</b> a safe space for failure in learning about the coach's growth mindset.</li> </ul> <p><b>Belief in the Coachee</b></p> <ul style="list-style-type: none"> <li>● <b>Maintain</b> an objective, non-defensive, non-judgmental stance.</li> <li>● <b>Modify</b> personal behavior and style to reflect the coachee's needs.</li> </ul>
<p><b>5 Catalyst</b></p>	<p><b>Coaching Ethics</b></p> <ul style="list-style-type: none"> <li>● <b>Engage</b> with the community about evolving ethics in coaching.</li> </ul> <p><b>Growth Mindset</b></p> <ul style="list-style-type: none"> <li>● <b>Model</b> a growth mindset in nearly all situations.</li> <li>● <b>Work</b> with large-scale systems and communities to create awareness for the coaching mindset.</li> <li>● <b>Create</b> opportunities for the world to experience a growth mindset.</li> </ul> <p><b>Belief in the Coachee</b></p> <ul style="list-style-type: none"> <li>● <b>Model</b> a behavior of neutrality which feels natural.</li> <li>● <b>Model</b> the coachee's beliefs by being a mirror back to them.</li> </ul>

**Coaching Skills**

To be a successful coach is more than just adopting the right mindset. Coaching models leverage specific skills and capabilities that allow the coach to help the client deepen

their thinking to where they need to go. Coaching skills are foundational techniques that you, as a Coach, can apply regardless of if you are working with an individual, a team, or an organization.

There are several approaches to one-on-one coaching, each of which may contain different models, practices, and tools that can help a coach given different contexts. Whichever tools a coach uses, they must co-create an effective relationship with the client and leverage their communication skills to cultivate learning and growth.

Coaching Systems looks at skills associated with coaching beyond individuals working with groups and relationships. There are many different approaches to coaching systems, each of which may contain different models, practices, and tools that can help a coach in the context of a system.

Both are included in the following areas:

- **Coaching Environment**

- Contracting - Understanding of the context for a specific coaching engagement and co-creating the agreement with the client to guide the coaching process and relationship.
- Presence - You are fully conscious and present with the client, employing an open, flexible, grounded and confident style. You can self-manage to stay fully present with the client, control your emotions and reactions, and stay out of judgment and in curiosity.
- Active Listening - You focus on what the client/system is and is not saying to understand what is being communicated.
- Building Rapport and Safety - You partner with the client (individual or system) to create a safe, supportive, confidential environment that allows the client to share freely. You maintain a relationship of mutual respect and trust.

- **Coaching Process**

- Coaching Conversations - Understands the coaching arc and can navigate across the different stages, including designing the alliance, identifying the agenda and the “real issue to be explored”, exploring the issue, and creating a commitment to action.
- Building Insights - You facilitate client insight and learning by using tools and techniques such as powerful questioning, silence, or metaphor
  - Powerful Questions
  - Metaphor/analogy

- Reflection
- Bottomlining
- Clean language

- **Forwarding the Action**

- Exploring Actions - Ability to co-create with the coachee opportunities for ongoing learning, during coaching and in work/life situations, and for taking new actions that will most effectively lead to agreed-upon coaching results.
- Accountability - Hold attention on what is important for the coachee while leaving the responsibility with the coachee to take action.

**Competency Level Definitions:**

Level	Reflection
<b>1</b> <b>Beginner</b>	<p><b>Coaching Environment</b></p> <ul style="list-style-type: none"> <li>● <b>Understand</b> the importance of a coaching contract and what it should contain. (e.g. the role of the coach, duration, expectations, feedback, responsibilities).</li> <li>● <b>Explain</b> how coaching a team differs from coaching an individual.</li> <li>● <b>Recognize</b> confidentiality as a basis for the coaching conversation.</li> <li>● <b>Describe</b> notable aspects of a coaching environment.</li> </ul> <p><b>Coaching Process</b></p> <ul style="list-style-type: none"> <li>● <b>Explain</b> the different levels of listening.</li> <li>● <b>Explain</b> the shape of a coaching conversation.</li> <li>● <b>Describe</b> powerful questions.</li> </ul> <p><b>Forwarding the Action</b></p> <ul style="list-style-type: none"> <li>● <b>Summarize</b> an observed coaching conversation.</li> </ul>
<b>2</b> <b>Advanced Beginner</b>	<p><b>Coaching Environment</b></p> <ul style="list-style-type: none"> <li>● <b>Identify</b> the coachee's agenda.</li> <li>● <b>Apply</b> a basic coaching agreement and contract.</li> <li>● <b>Discuss</b> how to coach the Team and Systems as a single entity.</li> </ul> <p><b>Coaching Process</b></p> <ul style="list-style-type: none"> <li>● <b>Summarize</b> the coachee's assumptions, behaviors, and mindset.</li> </ul>

	<ul style="list-style-type: none"> <li>● <b>Recognize</b> when they are no longer actively listening and are listening to respond.</li> <li>● <b>Ask</b> powerful questions that evoke discovery and insight, challenge assumptions, are open-ended, forward-looking and pre-supposing success.</li> </ul> <p><b>Forwarding the Action</b></p> <ul style="list-style-type: none"> <li>● <b>Articulate</b> the coachee's needs.</li> <li>● <b>Create</b> an accountability plan with the coachee.</li> </ul>
<p><b>3 Practitioner</b></p>	<p><b>Coaching Environment</b></p> <ul style="list-style-type: none"> <li>● <b>Contrast</b> different methods to develop, maintain, and reflect on agreements and goals with individuals and (the) system(s).</li> <li>● <b>Practice</b> encouraging individuals and system members to pause and reflect on their interactions and behavior in the coaching sessions.</li> <li>● <b>Understand</b> the unique needs of individuals and systems based on the stage of development.</li> </ul> <p><b>Coaching Process</b></p> <ul style="list-style-type: none"> <li>● <b>Identify</b> the coaching tools needed to help the coachee reach their goals.</li> <li>● <b>Able</b> to reorient and refocus the coaching conversation in service of the coachee's agenda.</li> <li>● <b>Reflect</b> on body language, words, tone and energy through active listening in service of the coachee.</li> <li>● <b>Illustrate</b> how to coach teams and Systems as a single entity.</li> </ul> <p><b>Forwarding the Action</b></p> <ul style="list-style-type: none"> <li>● <b>Understand</b> the client's insights and guide them to further their agenda.</li> <li>● <b>Create</b> an accountability plan where the coachee drives the actions.</li> </ul>
<p><b>4 Guide</b></p>	<p><b>Coaching Environment</b></p> <ul style="list-style-type: none"> <li>● <b>Build</b> and maintain a resilient learning environment.</li> <li>● <b>Create</b> opportunities for individuals and systems to reflect and grow coaching skills.</li> <li>● <b>Adapt</b> coaching environment based on individuals or systems stage of development.</li> </ul> <p><b>Coaching Process</b></p>

	<ul style="list-style-type: none"> <li>● <b>Demonstrate</b> how to challenge the individuals' and systems' assumptions, behaviors, and mindset to enhance their collective awareness and insight.</li> <li>● <b>Able</b> to focus on what the client is/is not saying to understand the meaning of what is said, e.g. client's agenda, concerns, values, beliefs, summarize and mirror back without judgment.</li> <li>● <b>Appraise</b> how the perspectives shared by individuals within the system relate to others' views and dialogues.</li> </ul> <p><b>Forwarding the Action</b></p> <ul style="list-style-type: none"> <li>● <b>Drive</b> the coachee to explore previously unseen areas and build new insights.</li> <li>● <b>Choose</b> to let go of the actions and accountability and enable the coachee to own them fully.</li> </ul>
<p><b>5 Catalyst</b></p>	<p><b>Coaching Environment</b></p> <ul style="list-style-type: none"> <li>● <b>Build</b> new approaches to create and maintain a safe space for open and honest interactions to help create a high-performing environment.</li> </ul> <p><b>Coaching Process</b></p> <ul style="list-style-type: none"> <li>● <b>Reflect</b> the hidden qualities and undercurrents to the individual or system to generate deep insights.</li> <li>● <b>Invent</b> and modifies practices to match the context and publish the result.</li> </ul> <p><b>Forwarding the Action</b></p> <ul style="list-style-type: none"> <li>● <b>Naturally</b> challenge the coachee to draw on wisdom for action from within through collaboration, experimentation, and their wider system.</li> </ul>

## Facilitating

Facilitating a group increases the effectiveness of people to align in a collaborative way, interpret their context, and mutually identify the most valuable outcomes desired. A facilitator has the skills to create a neutral environment of openness, safety, and innovation in a group setting.

*“Facilitation is the practical neutral craft (an informed blend of techniques and insights) of creating environments of openness, safety and innovation” (Turner, 2012).*

“A facilitator is an individual who uses self-awareness, self-management, group awareness, and group process to enable teams to access their collective intelligence in order to achieve their desired outcomes” (Acker, 2020). In other words, self-mastery is as important, if not more so, than the tools and techniques.

Someone using Agile Coaching practices needs a strong foundation in Facilitation as the client often needs someone to create a constructive space in which they can broaden and deepen their thinking to where they need to go.

## Facilitation Mindset

Being a Facilitator you maintain neutrality of the content being discussed, create a collaborative space, and encourage full participation of all members of the group.

- **Internal Focus** - Develop and maintain an open, reflective, positive and flexible mindset, allowing you to honour the group while remaining true to who you are.
  - **Integrity** - You behave in an ethical way that is in congruence with your personality, values, and spirit.
  - **Learning** - You recognise that learning is important to becoming a better facilitator for the clients you serve.
  - **Positivity** - Your positivity and resourcefulness, even in adversity, help a group find the motivation to move forward.
  
- **Belief in the group** - The group is creative, resourceful and whole and, with the right focus, has the answers to meet the outcome for themselves without external support.
  - **Neutrality** - You respect the perspective of each person in the group and their needs without judgement.
  - **Curiosity** - You are curious about the group's needs and adapt accordingly. By maintaining an open and flexible mind, you can maximise group learning.
  - **Honour the wisdom of the group** - The group is naturally resourceful and whole with unlimited potential. The group learns from its mistakes and becomes stronger. Demonstrate a belief in the group and its possibilities.

### Competency Level Definitions:

Level	Reflection
<b>1 Beginner</b>	<b>Internal Focus</b> <ul style="list-style-type: none"> <li>● <b>List</b> your values and their potential impact on work with clients.</li> </ul>

	<ul style="list-style-type: none"> <li>● <b>Recognise</b> situations when a facilitation stance is appropriate.</li> <li>● <b>Describe</b> how a positive attitude benefits the group.</li> </ul> <p><b>Belief in the Group</b></p> <ul style="list-style-type: none"> <li>● <b>Explain</b> why remaining neutral is important.</li> <li>● <b>Describe</b> the importance of maintaining respect for people's opinions.</li> <li>● <b>Describe</b> the importance of being open to the group's needs.</li> <li>● <b>Recognise</b> and welcome diverse opinions.</li> </ul>
<p><b>2</b> <b>Advanced</b> <b>Beginner</b></p>	<p><b>Internal Focus</b></p> <ul style="list-style-type: none"> <li>● <b>Describe</b> how you remain ethical when facilitating.</li> <li>● <b>Reflect</b> as a facilitator and describe your impact on the group.</li> <li>● <b>Express</b> your strengths and how they will allow you to be resourceful and positive.</li> </ul> <p><b>Belief in the Group</b></p> <ul style="list-style-type: none"> <li>● <b>Demonstrate</b> the ability to hold the group's agenda while minimizing your influence on group outcomes and the content of the discussions.</li> <li>● <b>Recognise</b> the evolving needs of the group.</li> <li>● <b>Describe</b> why we don't set the outcome of a session we are facilitating.</li> <li>● <b>Explain</b> the importance of the statement, <i>"The group is naturally creative, resourceful, and whole, and therefore, they have the means to solve their own challenges and do not need to be fixed in any way."</i></li> </ul>
<p><b>3</b> <b>Practitioner</b></p>	<p><b>Internal Focus</b></p> <ul style="list-style-type: none"> <li>● <b>Maintain</b> congruence between actions and personal and professional values.</li> <li>● <b>Demonstrate</b> your plan to improve your facilitation skills over the near future.</li> <li>● <b>Analyze</b> a session you facilitated and reflect on what went well and what would have worked better.</li> <li>● <b>Demonstrate</b> the ability to be positive and resourceful in stressful situations.</li> </ul> <p><b>Belief in the Group</b></p> <ul style="list-style-type: none"> <li>● <b>Practice</b> unconditional positive regard and always assume positive intent.</li> <li>● <b>Demonstrate</b> the ability to adapt based on the group's needs.</li> </ul>

	<ul style="list-style-type: none"> <li>● <b>Demonstrate</b> the ability to help groups believe in their potential and ability to change.</li> </ul>
<b>4 Guide</b>	<p><b>Internal Focus</b></p> <ul style="list-style-type: none"> <li>● <b>Guide</b> others in growing their internal focus through facilitation boundaries and ethics.</li> <li>● <b>Develop</b> your mental model for facilitation.</li> <li>● <b>Develop</b> multiple strategies for dealing with stress to bring your whole self to any moment.</li> </ul> <p><b>Belief in the Group</b></p> <ul style="list-style-type: none"> <li>● <b>Maintain</b> an objective, non-defensive, non-judgmental stance.</li> <li>● <b>Modify</b> personal behavior and style to reflect the group's needs.</li> <li>● <b>Evaluate</b> situations from a systems perspective.</li> </ul>
<b>5 Catalyst</b>	<p><b>Internal Focus</b></p> <ul style="list-style-type: none"> <li>● <b>Challenge</b> ethical and professional boundaries based on a deep understanding of yourself and your practice.</li> <li>● <b>Evolve</b> beyond your models, live facilitation in the moment, and adapt continuously.</li> <li>● <b>Reflect</b> positive energy through your facilitation that gives motivation to others.</li> </ul> <p><b>Belief in the Group</b></p> <ul style="list-style-type: none"> <li>● <b>Model</b> a behavior of neutrality which feels natural.</li> <li>● <b>Hold</b> a commitment to curiosity over being right.</li> <li>● <b>Model</b> the group's beliefs by being a mirror back to the system.</li> </ul>

**Facilitation Skills**

Being a Facilitator, design and deliver sessions that focus on what is essential for the group. You help the group be accountable for what they say they will do and their plan, and leave responsibility with them for action. You will be skilled in working through several different group situations.

- **Planning and Design**
  - **Develop Working Partnerships** - You partner with the client to agree on mutual commitment and develop an approach to meet the client's needs.



- **Design Sessions** - You co-create with the client to discover needs, establish roles, and create designs to achieve intended outcomes over one or multiple sessions.
- **Guiding the Process**
  - **Support Process** - You create an appropriate environment, atmosphere and logistics to support the purpose of the session(s).
  - **Deepen Awareness** - You set the stage to achieve outcomes. You evoke insights from the group, explore underlying issues and assist in reflection. You navigate conflict by explaining its value, bringing awareness and exploring assumptions.
  - **Focus on Outcomes** - You achieve group consensus with the ability to adapt according to the group's needs to meet the agreed outcome.
- **Participatory Environment**
  - **Inclusive Approach** - You use various techniques that foster open participation considering client culture, diversity and participants who have different approaches to learning and ways of processing information.
  - **Inspire Group Creativity** - You draw out participants with various approaches to learning and ways of processing information. Encourage creative thinking and stimulate group energy.
  - **Participatory Communication** - You use skills such as building rapport, listening, reflecting, questioning, observing and giving feedback.

**Competency Level Definitions:**

Level	Reflection
<p><b>1</b> <b>Beginner</b></p>	<p><b>Planning and Design</b></p> <ul style="list-style-type: none"> <li>● <b>Identify</b> that managing multi-stakeholders relationships are more complicated than one-to-one interactions.</li> <li>● <b>Understand</b> the need to design and customize the facilitation sessions for each group.</li> </ul> <p><b>Guiding the Process</b></p> <ul style="list-style-type: none"> <li>● <b>List</b> attributes of a group environment that will enable active participation.</li> <li>● <b>Describe</b> a basic facilitation arc.</li> <li>● <b>Explain</b> the need to achieve group consensus and adapt to the group's needs.</li> <li>● <b>Identify</b> the outcome of a session.</li> </ul> <p><b>Participatory Environment</b></p>

	<ul style="list-style-type: none"> <li>● <b>List</b> a variety of tools and techniques that foster open participation.</li> <li>● <b>Describe</b> how a Facilitator maintains psychological safety, trust, transparency, and clarity throughout the engagement with the group.</li> <li>● <b>List</b> various tools and techniques that encourage creative thinking and stimulate group energy.</li> <li>● <b>Explain</b> the importance of active listening in group facilitation.</li> </ul>
<p><b>2</b> <b>Advanced</b> <b>Beginner</b></p>	<p><b>Planning and Design</b></p> <ul style="list-style-type: none"> <li>● <b>Apply</b> a facilitation agreement with a stakeholder.</li> <li>● <b>Design</b> a basic facilitation plan that ensures engagement for all participants.</li> </ul> <p><b>Guiding the Process</b></p> <ul style="list-style-type: none"> <li>● <b>Demonstrate</b> the ability to facilitate a session with active yet balanced participation for all group members.</li> <li>● <b>Demonstrate</b> the ability to follow a basic facilitation arc.</li> <li>● <b>Demonstrate</b> facilitating a group to consensus.</li> <li>● <b>Facilitate</b> a group to an agreed outcome.</li> </ul> <p><b>Participatory Environment</b></p> <ul style="list-style-type: none"> <li>● <b>Demonstrate</b> the use of various tools and techniques that foster open participation.</li> <li>● <b>Demonstrate</b> various tools and techniques that encourage creative thinking and stimulate group energy.</li> <li>● <b>Demonstrate</b> skills such as building rapport, listening, reflecting, questioning, observing and giving feedback.</li> </ul>

<p><b>3</b> <b>Practitioner</b></p>	<p><b>Planning and Design</b></p> <ul style="list-style-type: none"> <li>● <b>Develop</b> consensus with stakeholders on tasks, deliverables, roles &amp; responsibilities.</li> <li>● <b>Diagnose</b> the client's needs.</li> <li>● <b>Design</b> sessions that consider group energy, participation and the agreed outcome.</li> </ul> <p><b>Guiding the Process</b></p> <ul style="list-style-type: none"> <li>● <b>Demonstrate</b> competency in adapting in the moment to challenges and opportunities that arise.</li> <li>● <b>Demonstrate</b> the ability to facilitate conflict.</li> <li>● <b>Construct</b> multiple linked sessions to meet an outcome.</li> <li>● <b>Bring clarity</b> to a group's agenda and outcome and ensure everyone understands the resulting outcome and responsibilities.</li> </ul> <p><b>Participatory Environment</b></p> <ul style="list-style-type: none"> <li>● <b>Demonstrate</b> the ability to use multiple facilitation frameworks depending on the context of the session.</li> <li>● <b>Integrate</b> multiple tools and techniques that encourage creative thinking and stimulate group energy.</li> <li>● <b>Analyze</b> why you used a specific tool in any session and its impact on the group.</li> </ul>
<p><b>4</b> <b>Guide</b></p>	<p><b>Planning and Design</b></p> <ul style="list-style-type: none"> <li>● <b>Evaluate</b> your client and stakeholder relationships and adapt as needed.</li> <li>● <b>Build</b> rapport with your stakeholders naturally.</li> <li>● <b>Assess</b> a facilitation plan and its likelihood of engaging participants in pursuing their outcome.</li> <li>● <b>Analyze</b> organizational and systemic constraints that might impact facilitated sessions.</li> </ul> <p><b>Guiding the Process</b></p> <ul style="list-style-type: none"> <li>● <b>Recognize</b> tangents and redirect to the task.</li> <li>● <b>Demonstrate</b> the ability to separate yourself from the process.</li> <li>● <b>Develop</b> a group understanding of the value of different perspectives.</li> </ul> <p><b>Participatory Environment</b></p> <ul style="list-style-type: none"> <li>● <b>Create</b> containers that foster trust, connection and inclusiveness.</li> </ul>

	<ul style="list-style-type: none"> <li>● <b>Design</b> group processes that engage the whole group.</li> <li>● <b>Listen</b> for the 2% common ground to help build a shared understanding.</li> </ul>
<b>5 Catalyst</b>	<p><b>Planning and Design</b></p> <ul style="list-style-type: none"> <li>● <b>Evolve</b> the design of the session in the moment based on feedback.</li> </ul> <p><b>Guiding the Process</b></p> <ul style="list-style-type: none"> <li>● <b>Create</b> new ways to guide the process and share them with the community.</li> </ul> <p><b>Participatory Environment</b></p> <ul style="list-style-type: none"> <li>● <b>Appraise</b> a situation in the moment for signs of psychological safety.</li> <li>● <b>Create</b> and teach new facilitation skills and techniques.</li> </ul>

## Guiding Learning

Guiding learning is about effectively growing an individual, a group, or a team's skills and enabling them to be competent and resourceful. With this competency, you choose the most effective learning method to help learners achieve their learning outcomes and inspire future learning.

Agile is all about learning; you must guide the learning of other people around you, helping them learn new skills and gain knowledge.

### Learning Mindset

Being a guide, you believe in the power of continuous learning and people's unbounded potential to change and grow. There are certain attitudes and beliefs that you hold that underpin both your mentoring and training approach.

- **Growth**
  - Believe that everyone can learn and grow and that learning is a lifelong journey.
  - See the learner as creative, resourceful and whole, not needing to be fixed.
  - Express curiosity: Be open to feedback and focus on continuous learning.
- **Environment**
  - Identify culture and adapt to meet the individuals and the organization *where they are*.

- Cultivate an environment of trust, respect and safety - partner with the learners to create a psychologically safe and supportive environment that enables learning and encourages collaboration.
- Create a learning environment that allows experimentation and supports the learner's reflection.
- **Guiding**
  - Share experiences and knowledge with the intent of helping learners be the best they can be.
  - Maintain awareness of self, and listen to the learner's needs.
  - Develop learner-driven content that is interactive and engaging, enabling a concrete connection to the concepts.
  - Validate learners' understanding of concepts and skills.

**Competency Level Definitions:**

Level	Reflection
<b>1 Beginner</b>	<p><b>Growth</b></p> <ul style="list-style-type: none"> <li>● <b>Explain</b> how learning is a lifelong journey.</li> <li>● <b>Discuss</b> the importance of feedback.</li> </ul> <p><b>Environment</b></p> <ul style="list-style-type: none"> <li>● <b>Describe</b> how to cultivate an environment of trust, respect and safety.</li> </ul> <p><b>Guiding</b></p> <ul style="list-style-type: none"> <li>● <b>Discuss</b> how you can validate a learner's understanding of concepts and skills.</li> </ul>
<b>2 Advanced Beginner</b>	<p><b>Growth</b></p> <ul style="list-style-type: none"> <li>● <b>Show</b> how feedback given well can be transformative.</li> <li>● <b>Apply</b> feedback received to improve your guiding skills.</li> </ul> <p><b>Environment</b></p> <ul style="list-style-type: none"> <li>● <b>Assess</b> the impact you are having on the learners.</li> <li>● <b>Create</b> a supportive environment for your learners.</li> </ul> <p><b>Guiding</b></p> <ul style="list-style-type: none"> <li>● <b>Develop</b> a workshop based on learner-driven content.</li> </ul>
<b>3 Practitioner</b>	<p><b>Growth</b></p> <ul style="list-style-type: none"> <li>● <b>Design</b> an activity to help your learner distil their learning so they know what they have learned.</li> </ul>

	<ul style="list-style-type: none"> <li>● <b>Analyze</b> three ways to help your learners grow professionally.</li> <li>● <b>Demonstrate</b> at least three methods to give and receive feedback with curiosity to drive continuous learning.</li> </ul> <p><b>Environment</b></p> <ul style="list-style-type: none"> <li>● <b>Create</b> a partnership with learners to create a psychologically safe environment to enable learning and encourage collaboration.</li> <li>● <b>Integrate</b> experimentation and reflection into your learning environment.</li> <li>● <b>Modify</b> the environment based on organizational culture to meet your learners where they are.</li> </ul> <p><b>Guiding</b></p> <ul style="list-style-type: none"> <li>● <b>Believe</b> in a learner's potential unconditionally.</li> <li>● <b>Create</b> and foster a learner-and-guide relationship based on mutual trust, respect and commitment.</li> <li>● <b>Explain</b> why entering a learning relationship requires compatibility with the learner to be successful.</li> </ul>
<p><b>4 Guide</b></p>	<p><b>Growth</b></p> <ul style="list-style-type: none"> <li>● <b>Exhibit</b> a deep understanding of what makes a learning mindset, and instinctively use that to guide growth in the client.</li> <li>● Instinctively <b>appraise</b> the learner's mindset and assess what they need to move forward.</li> <li>● <b>Reflect</b> and <b>demonstrate</b> the impact of a learning mindset on the individual mentee.</li> </ul> <p><b>Environment</b></p> <ul style="list-style-type: none"> <li>● <b>Construct</b> a learning environment where learners can successfully seek learning and growth opportunities.</li> <li>● <b>Appraise</b> how a cultural adoption of a learning mindset reflects positively on the organization.</li> <li>● <b>Foster</b> an environment where experimentation is encouraged and promoted as the key learning method.</li> </ul> <p><b>Guiding</b></p> <ul style="list-style-type: none"> <li>● <b>Create</b> and <b>support</b> multiple learning groups and relationships based on trust, respect and commitment.</li> </ul>

	<ul style="list-style-type: none"> <li>● <b>Explain</b> and <b>articulate</b> with stakeholders their role in shaping a psychologically safe environment to unlock learning.</li> </ul>
<b>5 Catalyst</b>	<ul style="list-style-type: none"> <li>● <b>Design</b> and <b>promote</b> new methods and techniques for guided learning.</li> <li>● <b>Recognised</b> as a leading authority in guided learning experimentation.</li> <li>● Is sought after by organizations to <b>shape</b> their approach to active learning.</li> <li>● Regularly <b>speak</b> at conferences and seminars about Learning.</li> </ul>

## Mentoring

Mentoring is the creation of a “learning relationship between two (or more) individuals who share mutual responsibility and accountability for helping a mentee towards a clear and mutually defined learning goal. Learning is the fundamental process, purpose and product of mentoring”. (Zachary, 2005).

In a mentoring relationship, the mentor has experience in the area of growth, although both the mentor and mentee may learn from the interaction. Mentoring involves sharing with the mentee different approaches and acting as a guide down pathways commonly taken.

- **Mentee Focus** - Mentoring is a two-way relationship where those involved make agreements to learn together.
  - Balancing between coaching and advising.
  - Exercises non-judgmental appraisal towards the mentee's goal
  - Helps the mentee identify the next thing to learn
- **Sharing Expertise** - Mentoring is both generative and directive. The mentee has a choice as to whether to adopt a mentor's suggestions at a given time; however, the mentor ensures that learning happens regardless of the mentee's choice. The Mentor...
  - Shares subject matter expertise in the areas of need to the mentee
  - Understands the boundaries of own expertise and when to seek other experts for the mentee
  - Shares experience by showing examples, storytelling, roleplay, giving feedback, and sharing resources/connections.
  - Checks resonance with the mentee.

**Competency Level Definitions:**

Level	Reflection
<b>1 Beginner</b>	<b>Mentee Focus</b> <ul style="list-style-type: none"><li>● <b>Describe</b> the opportunity for learning for both you, the mentor and the mentee.</li><li>● <b>Describe</b> the impact of clear goals on a mentoring relationship.</li></ul> <b>Sharing Expertise</b> <ul style="list-style-type: none"><li>● <b>Identify</b> if you are compatible with a mentor or mentee.</li><li>● <b>List</b> several ways you might share expertise with a mentee.</li></ul>
<b>2 Advanced Beginner</b>	<b>Mentee Focus</b> <ul style="list-style-type: none"><li>● <b>Describe</b> three techniques to help individuals recognize areas of weakness and create positive change for themselves.</li><li>● <b>Demonstrate</b> giving feedback in a way that encourages growth.</li><li>● <b>Create</b> a mentee relationship that connects your experience to the mentee's needs.</li></ul> <b>Sharing Expertise</b> <ul style="list-style-type: none"><li>● <b>Demonstrate</b> your ability to mentor a person or team.</li><li>● <b>Support</b> your recommendation to the mentee using your expertise.</li><li>● <b>Explain</b> how the scenario(s) you share relate to the problem for which the mentee is seeking guidance.</li></ul>



Level	Reflection
<p><b>3</b> <b>Practitioner</b></p>	<p><b>Mentee Focus</b></p> <ul style="list-style-type: none"> <li>● <b>Identify</b> the mentee's needs and adapt your approach appropriately, e.g. 1-1, peer, group, flash.</li> <li>● <b>Evaluate</b> at least three factors that may contribute to your decision to stop mentoring.</li> <li>● <b>Co-create</b> goals and create a shared purpose to guide your relationship.</li> </ul> <p><b>Sharing Expertise</b></p> <ul style="list-style-type: none"> <li>● <b>Illustrate</b> - through storytelling, examples and roleplay - the means to tackle similar problems.</li> <li>● <b>Appraise</b> the mentee's desire to make use of such information. If so, expound on any scenarios deemed valuable by the mentee.</li> <li>● <b>Modify</b> your approach to mentoring based on feedback and changes in the mentee's needs.</li> </ul>
<p><b>4</b> <b>Guide</b></p>	<p><b>Mentee Focus</b></p> <ul style="list-style-type: none"> <li>● <b>Evaluate</b> how your mentoring is helping the mentee to experiment and learn and that the mentee is now 'self-propelling', at least in part, towards their goals.</li> <li>● <b>Demonstrate</b> the self-mastery of mentoring to adapt your approach to help the mentee achieve their goals.</li> <li>● <b>Describe</b> how your mentoring approach can have a positive, lasting impact on the mentee beyond the contract.</li> </ul> <p><b>Sharing Expertise</b></p> <ul style="list-style-type: none"> <li>● <b>Design</b> a mentorship programme that caters to the needs of the mentees and the broader organization.</li> <li>● <b>Create</b> an environment where mentees demonstrate their learning and learned ability to learn.</li> </ul>
<p><b>5</b> <b>Catalyst</b></p>	<ul style="list-style-type: none"> <li>● <b>Design</b> new methods and techniques for mentoring.</li> <li>● <b>Reflect</b> on the impact of effective mentoring and leverage observations to continuously improve.</li> <li>● <b>Recognised</b> as an authority in mentoring individuals and organizations.</li> <li>● Actively <b>contribute</b> to the community's growth.</li> </ul>

## Teaching

Being a Teacher, you will engage with learners to catalyze their understanding and application of knowledge, competence and skills. It could include logistics, design, content selection, delivery, assessment and reflection.

- **Learning Design**
  - Understands different learning styles and creates experiences so that the knowledge, competence and skills can be applied by all.
  - Designs a meaningful learning experience.
  - Develops learning journeys that focus on the learner.
  
- **Delivery**
  - Adapts in the moment and fluidly shifts learning frames toward the learner's needs.
  - Shares expertise and experiences through examples, storytelling, roleplay, giving feedback, and sharing resources/connections.
  - Validate learning of concepts and application of skills beyond the course.

### Competency Level Definitions:

Level	Reflection
<b>1</b> <b>Beginner</b>	<b>Learning Design</b> <ul style="list-style-type: none"> <li>● <b>Describe</b> training and approaches to human learning.</li> <li>● <b>Evaluate</b> the learning needs of an individual or team.</li> </ul> <b>Delivery</b> <ul style="list-style-type: none"> <li>● <b>Explain</b> two or more ways to share knowledge with a group.</li> </ul>
<b>2</b> <b>Advanced Beginner</b>	<b>Learning Design</b> <ul style="list-style-type: none"> <li>● <b>Design</b> a learning experience using an appropriate training style.</li> <li>● <b>Modify</b> delivery and content based on cultural and social context.</li> <li>● <b>Develop</b> clear learning objectives to create and execute training.</li> </ul> <b>Delivery</b> <ul style="list-style-type: none"> <li>● <b>Demonstrate</b> proficiency in delivering a half-day training workshop on any Agile topic.</li> <li>● <b>Revise</b> your approach to training based on feedback.</li> </ul>

	<ul style="list-style-type: none"> <li>● <b>Integrate</b> learning materials to meet the needs and objectives of at least one training event.</li> </ul>
<p><b>3 Practitioner</b></p>	<p><b>Learning Design</b></p> <ul style="list-style-type: none"> <li>● <b>Create</b> a suitable learning environment in either the physical or virtual space.</li> <li>● <b>Design</b> a safe learning environment where students can engage and learn from each other.</li> <li>● <b>Develop</b> learning opportunities that engage participants with different learning approaches and ways of processing information.</li> </ul> <p><b>Delivery</b></p> <ul style="list-style-type: none"> <li>● <b>Demonstrate</b> proficiency in delivering training using at least one of the teaching philosophies such as Alchemy, TBR (Training from the Back of the Room), Deep Learning, etc.</li> <li>● <b>Integrate</b> effective storytelling into training to convey key concepts.</li> <li>● <b>Demonstrate</b> the ability to deal with disruptive situations in training workshops.</li> </ul>
<p><b>4 Guide</b></p>	<p><b>Learning Design</b></p> <ul style="list-style-type: none"> <li>● <b>Design</b> learning journeys that seamlessly encompass multiple learning techniques.</li> <li>● <b>Demonstrate</b> the ability to craft learning environments using elements of physical, virtual and hybrid spaces.</li> <li>● <b>Appraise</b> how the broader ecosystem can affect and shape learning programmes and approaches to teaching.</li> </ul> <p><b>Delivery</b></p> <ul style="list-style-type: none"> <li>● Regularly <b>experiment</b> with new emerging techniques for facilitating learning experiences.</li> <li>● <b>Demonstrate</b> the ability to <i>read the room</i> and to <b>adapt</b> delivery style and approach on the fly.</li> <li>● <b>Create</b> training workshops which include positive disruption, and out-of-the-box thinking that is intentional and encouraged.</li> </ul>

<p><b>5</b> <b>Catalyst</b></p>	<p><b>Learning Design</b></p> <ul style="list-style-type: none"> <li>● <b>Design</b> new teaching techniques based on feedback and experience on the field.</li> <li>● Regularly <b>reflect</b> and distill systemic and environmental challenges to formulate new learning experiments.</li> <li>● Actively <b>contributes</b> to the growth of the teaching community.</li> </ul> <p><b>Delivery</b></p> <ul style="list-style-type: none"> <li>● <b>Invent</b> and tailor activities during the session to meet the emerging needs of learners.</li> </ul>
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## Advising

Advising is the ability to bring your knowledge, experience, insights, and observations to guide the client and move them forward. As a *trusted adviser*, you are invested in the success of the client and will necessarily create a long-term relationship.

As a trusted advisor you:

- Are a truth teller, challenging false assumptions and correcting misunderstandings in gentle, effective ways.
- Provide context, options, reasoning and space to think about the things of greatest importance to the client while always giving choice.
- Share advice as required, when both relevant and helpful to the client in service of their goals.

The advising stance is important at all levels of an organization, not merely at the enterprise or leadership levels. You may be called upon to advise teams and stakeholders as well as leaders.

As a trusted advisor, remember that the company's people understand their goals, needs, culture, and work processes best. Your role is to bridge the gap between identifying the client's objectives and proposing specific actions. Empower clients to control their agenda and choose their direction, even if it deviates from your suggestions.

Keep in mind, being a trusted advisor doesn't always mean being an external consultant.

## Advising Mindset

As a trusted advisor, your mindset must include the behaviors and actions that have the greatest likelihood of helping your client meet their goals through increasing the organization's agility.

You must...

- Be a trusted partner whereupon you will create trust and build an ongoing relationship by establishing rapport and by being empathic; by instilling confidence; and by understanding both the business and personal client context.
- Empathize with the client's intellectual, emotional, and financial needs.
- Foster an environment in which feedback is sought and given.
- Be confident, establishing gravitas, presence and persona.
- Think and operate collaboratively, co-creating outcomes while deepening your relationship with the client.
- View the system using a holistic outside-in perspective.
- Be curious, allowing no important questions to remain unasked. "What is possible in this situation?"
- Be carefully critical, challenging assertions and assumptions.
- Be aware of your own biases.

### Competency Level Definitions:

Level	Reflection
<b>1 Beginner</b>	<ul style="list-style-type: none"> <li>● <b>Demonstrate</b> empathy as a first step toward becoming a trusted partner.</li> <li>● <b>Understand</b> the need to be reliable and do what you say you will do.</li> <li>● <b>Understand</b> that your success in other contexts, will not be directly applicable by the client, but may still be useful.</li> <li>● <b>Identify</b> the importance of keeping an open mind.</li> </ul>
<b>2 Advanced Beginner</b>	<ul style="list-style-type: none"> <li>● <b>Recognize</b> the importance of co-creating goals and agreements with your client.</li> <li>● <b>Understand</b> your responsibility as a trusted advisor to challenge your client's limiting beliefs and inertia.</li> </ul>

	<ul style="list-style-type: none"> <li>● <b>Identify</b> your biases and acknowledge the need to be aware of them.</li> <li>● <b>Demonstrate</b> flexibility, effective communication, and empathy when working with clients and colleagues.</li> </ul>
<b>3 Practitioner</b>	<ul style="list-style-type: none"> <li>● <b>Foster</b> an environment that embraces a growth mindset.</li> <li>● <b>Examine</b> the impact of your actions and decisions on your agility, and identify areas for improvement.</li> <li>● <b>Assess</b> the quality of your collaborative efforts and the relevance of your proposed solutions in addressing client needs.</li> <li>● <b>Build</b> trust and establish a long-term relationship with your client.</li> </ul>
<b>4 Guide</b>	<ul style="list-style-type: none"> <li>● <b>Provide</b> context, options, reasoning, and space for your client to think about things of greatest importance to them.</li> <li>● <b>Demonstrate</b> the ability to challenge assertions and assumptions in a careful but critical manner.</li> <li>● <b>Develop</b> strategies to continuously refine an agile mindset, incorporating feedback, building resiliency and embracing growth opportunities.</li> </ul>
<b>5 Catalyst</b>	<ul style="list-style-type: none"> <li>● <b>Design</b> customized advising strategies for your client based on their specific needs and goals.</li> <li>● <b>Innovate</b> and <b>contribute</b> to the evolution of the agile coaching profession by sharing your knowledge and insights with the community.</li> <li>● <b>Act</b> as a thought leader in the agile coaching field, with a deep understanding of the intellectual, emotional, and financial needs of clients.</li> </ul>

**Advising Skills**

As an agile coach who provides advice to your client, your responsibility includes sharing ideas, patterns, stories and examples of successful agile transformations and solutions that are relevant to your client’s particular circumstances.

As a trusted advisor, you must...

- Continuously build trust to help deepen your relationship with the client.
- Be an active listener so as to understand the client's goals and constraints.
- Be able to recite what the client says they want to get out of the relationship.
- Set boundaries.
- Have the ability to read and understand emotions in others. (emotional intelligence)
- Navigate social situations effectively by understanding and managing interpersonal dynamics and emotions. (social intelligence)
- Have the courage to say the things that must be said.
- Speak plainly but with kindness and respect.
- Establish the practice of providing and requesting feedback, and evaluate that feedback as an ongoing part of the relationship.
- Have a breadth of knowledge over many domains AND a depth of knowledge sufficient to provide value in your client's industry.
- Assess, document, and communicate assumptions behind recommendations.
- Tell them what to do on occasions when they do not have the language, the skill or the understanding to construct a path to their stated goals.

Competency Level Definitions:

Level	Reflection
<b>1 Beginner</b>	<ul style="list-style-type: none"> <li>● <b>Highlight</b> the key skills and behaviors of a trusted advisor, such as building trust, listening actively, and setting boundaries.</li> <li>● <b>Summarize</b> the value of emotional and social intelligence.</li> <li>● <b>Express</b> the importance of having a broad knowledge base to support clients effectively.</li> </ul>
<b>2 Advanced Beginner</b>	<ul style="list-style-type: none"> <li>● <b>Practice</b> asking open-ended questions to understand your client's goals and constraints.</li> <li>● <b>Co-create</b> clear goals and agreements with the client.</li> <li>● <b>Apply</b> effective feedback techniques by actively seeking input, listening attentively, and responding with appreciation and actionable steps.</li> </ul>
<b>3 Practitioner</b>	<ul style="list-style-type: none"> <li>● <b>Align</b> on goals with your client.</li> <li>● <b>Apply</b> emotional and social intelligence to communicate clearly with kindness even when delivering difficult messages to your client.</li> </ul>

	<ul style="list-style-type: none"> <li>● <b>Demonstrate</b> the ability to communicate clearly and respectfully, assess assumptions, and offer guidance when clients lack direction.</li> </ul>
<b>4 Guide</b>	<ul style="list-style-type: none"> <li>● <b>Share</b> ideas, patterns, stories, and examples of successful agile transformations and solutions that are relevant to your client's particular circumstances.</li> <li>● <b>Assess</b> and improve the effectiveness of your recommendations, feedback, and communication in achieving clients' goals and addressing their constraints.</li> <li>● <b>Develop</b> strategies to continuously refine your skills as a trusted advisor, incorporating feedback, deepening knowledge, and strengthening relationships.</li> </ul>
<b>5 Catalyst</b>	<ul style="list-style-type: none"> <li>● <b>Design</b> customized advising strategies for your client based on their specific needs and goals.</li> <li>● <b>Innovate</b> and <b>contribute</b> to the evolution of advisory by sharing experience, knowledge, and insights with the community.</li> <li>● <b>Develop</b> effective, empathic feedback systems and foster their use at all holons.</li> <li>● <b>Act</b> as a thought leader, with a deep understanding of the intellectual, emotional, and financial needs of clients.</li> </ul>

## Leading

Leading is about being the change you want to see to make the world a better place. As a leader, you can catalyze growth and inspire others to realize a shared vision.

Leadership skills are required to help grow teams and organizations using Agile principles and practices. The central notion is shared responsibility in leading and partnering with other leaders towards a goal.

As a successful leader, you must move between many stances supporting these concepts. You may lead from the front as a visionary or let your inner purpose inspire others. At other times you will be asked to subsume yourself for the betterment of others, adopting a servant leadership stance. A successful leader can “dance in the moment”, knowing when and how to move between these various stances.



## Leading and Self-Mastery

There is a strong connection between leading and self-mastery. You model behavior, principles, values, and practices in your daily leadership, extending into solid leadership behaviors when nobody is around to observe them—modeling from the inside out.

## Visionary

You are a visionary leader where the organization is your product.

A visionary leader is co-creating a vision of the future that acts as a positive attractor or catalyst for incremental change. Change aligned to business agility, innovation, team health, and customer value delivery. You do this by assisting other leaders and organizations in dreaming of inspiring future states and helping them hone, share, and instantiate those dreams organizationally.

A visionary is also an evangelist and champion of agility within organizations (system). Storytelling is an inherently important part of being a visionary, helping to connect the dots for everyone across the organization.

- **Purpose** - Aligning and connecting people with a sense of purpose. Co-creating a powerful attractor for positive change, focusing everyone on a shared outcome.
- **Inspiring** - Having the ability to weave powerful stories to illuminate a vision.
- **Empirical** - Being guided by data and using empiricism to further organizational understanding, experimentation and the emergence of new ways of thinking, leading, and working.

### Competency Level Definitions:

Level	Reflection
<b>1 Beginner</b>	<b>Purpose</b> <ul style="list-style-type: none"><li>● <b>Understand</b> the importance of co-creating purpose through such things as vision, strategy and goals.</li><li>● <b>Express</b> the value of clarity around purpose and outcomes.</li><li>● <b>Describe</b> the importance of having a clear vision.</li></ul> <b>Inspiring</b> <ul style="list-style-type: none"><li>● <b>Summarize</b> the importance of being supportive in the face of challenges.</li><li>● <b>Understand</b> the role of storytelling in communicating a compelling vision.</li></ul>

	<ul style="list-style-type: none"> <li>● <b>Describe</b> how taking responsibility for your actions may inspire others.</li> <li>● <b>Discuss</b> the importance of a leader connecting with people on a human level.</li> </ul> <p><b>Empirical</b></p> <ul style="list-style-type: none"> <li>● <b>Understand</b> the importance of building a culture of feedback and learning.</li> <li>● <b>Express</b> the differences between a predict and plan approach vs a sense and respond approach.</li> <li>● <b>Identify</b> the benefits of empirical processes to test an idea/hypothesis.</li> </ul>
<p><b>2</b> <b>Advanced Beginner</b></p>	<p><b>Purpose</b></p> <ul style="list-style-type: none"> <li>● <b>Practice</b> different approaches to identifying purpose or defining a strategy.</li> <li>● <b>Use</b> an approach to co-create a better vision of the future.</li> <li>● <b>Understand</b> the role that purpose plays in creating organizational resilience.</li> </ul> <p><b>Inspiring</b></p> <ul style="list-style-type: none"> <li>● <b>Explain</b> how positivity can be credible, compelling or inauthentic.</li> <li>● <b>Contrast</b> diverse approaches to formulating and communicating a vision.</li> <li>● <b>Practice</b> acknowledging and owning your actions.</li> <li>● <b>Demonstrate</b> curiosity about others.</li> </ul> <p><b>Empirical</b></p> <ul style="list-style-type: none"> <li>● <b>Adapt</b> your approach based on feedback and learning.</li> <li>● <b>Describe</b> three mindset shifts required to lead effectively in high volatility and uncertainty.</li> <li>● <b>Apply</b> evidence-based decision-making.</li> </ul>
<p><b>3</b> <b>Practitioner</b></p>	<p><b>Purpose</b></p> <ul style="list-style-type: none"> <li>● <b>Recognise</b> that purpose goes beyond value generation for customers.</li> <li>● <b>Create</b> and communicate an intrinsic sense of purpose and the why behind it.</li> <li>● <b>Guide</b> decision-making based on the organizations purpose.</li> </ul> <p><b>Inspiring</b></p>

	<ul style="list-style-type: none"> <li>● <b>Demonstrate</b> the ability to tell stories that bring the organizational purpose and culture alive.</li> <li>● <b>Foster</b> a culture of innovation and experimentation, fueling ongoing improvement and recognising that failure is an inherent part of the process.</li> <li>● <b>Implement</b> strategies for creating a shared sense of purpose and direction.</li> </ul> <p><b>Empirical</b></p> <ul style="list-style-type: none"> <li>● <b>Utilize</b> data-informed decisions to inform organizational improvements.</li> <li>● <b>Communicate</b> findings to stakeholders and facilitate action based on insights.</li> <li>● <b>Demonstrate</b> approaches toward innovation and experimentation in complex environments.</li> </ul>
<p><b>4</b> <b>Guide</b></p>	<p><b>Purpose</b></p> <ul style="list-style-type: none"> <li>● <b>Consider</b> how purpose can be integrated into the personal values and beliefs of those in the organization.</li> <li>● <b>Cultivate</b> awareness of your intrinsic motivators, assess how they align with the organizations purpose and recognise where they might not.</li> <li>● <b>Reflect</b> on instances when the organizational purpose is misaligned with the efforts of those involved in the work.</li> </ul> <p><b>Inspiring</b></p> <ul style="list-style-type: none"> <li>● <b>Support</b> and guide leaders and team members on effective communication and visioning techniques.</li> <li>● <b>Create</b> a culture of creativity and “safe to learn” experimentation in generating innovative ideas and approaches.</li> <li>● <b>Evaluate</b> your organizational vision to ensure it remains aligned with its goals and values.</li> </ul> <p><b>Empirical</b></p> <ul style="list-style-type: none"> <li>● <b>Lead</b> organizational change based on data insights and trends.</li> <li>● <b>Demonstrate</b> your expertise in enhancing an organization's responsiveness to change through examples.</li> </ul>

	<ul style="list-style-type: none"> <li>● <b>Assess</b> your organization's ability to evaluate itself by accepting and inviting clear feedback.</li> </ul>
<p><b>5 Catalyst</b></p>	<p><b>Purpose</b></p> <ul style="list-style-type: none"> <li>● <b>Co-create</b> organizational purpose that positively impacts the world.</li> <li>● <b>Embed</b> behaviors and values that support your people and organizational purpose.</li> <li>● <b>Evolve</b> a shared organizational vision through inclusivity and building trust.</li> </ul> <p><b>Inspiring</b></p> <ul style="list-style-type: none"> <li>● <b>Listen</b> with the intent to understand and use your emotional intelligence to let people know how much you care and why the vision matters.</li> <li>● <b>Incorporate</b> diverse perspectives to inform, enhance and innovate</li> <li>● <b>Explore</b> how your organizational vision can catalyse positive change beyond the organization.</li> </ul> <p><b>Empirical</b></p> <ul style="list-style-type: none"> <li>● <b>Educate</b> others that in a VUCA world, there are many possible answers.</li> <li>● <b>Foster</b> safety and equal voice to cultivate a culture of learning and experimentation.</li> </ul>

## Role Modeling

Think of role modeling in the simplest terms: a leader walking their talk each day, modeling agile principles and values and aligning how you show up personally and professionally. Role models listen, learn, own their mistakes and ask for help.

There are two modes of role modeling. Modeling when the going is easy and modeling when the going is tough. Being resilient means you have evolved through experience and the ability to operate from a stable, conscious place, even when the going gets tough.

Role modeling is also an extension of mentoring or showing what excellence looks like in practice, not just theory.

- **Be an Agilist:** A leader must walk the talk and model agile principles and values daily, showing others what being an Agilist means.
- **Model Resilience:** Under pressure, a leader's ethics, values, and principles must show up. Building resilience over time is crucial for role modeling.

- **Be in the Moment:** Lead in the moment, able to let go of what has been and what might be. Takes full responsibility for circumstances, viewing every interaction as an opportunity to learn.

**Competency Level Definitions:**

Level	Reflection
<p><b>1</b> <b>Beginner</b></p>	<p><b>Being an Agilist</b></p> <ul style="list-style-type: none"> <li>● <b>Reflect</b> on agile principles and values and identify areas of personal growth.</li> <li>● <b>Identify</b> examples of positive and negative role modeling.</li> <li>● <b>Study</b> different models of leadership.</li> </ul> <p><b>Model Resilience</b></p> <ul style="list-style-type: none"> <li>● <b>Describe</b> the importance of taking responsibility for circumstances.</li> <li>● <b>Identify</b> situations that may require resilience.</li> <li>● <b>Understand</b> the importance of self-care for mental resilience.</li> </ul> <p><b>Be in the Moment</b></p> <ul style="list-style-type: none"> <li>● <b>Understand</b> that what you say and do impacts others.</li> <li>● <b>Understand</b> the value of being curious and learning from everyone's perspectives.</li> <li>● <b>Identify</b> triggers that cause you to dwell on past or future events instead of being present in the current situation.</li> </ul>
<p><b>2</b> <b>Advanced Beginner</b></p>	<p><b>Being an Agilist</b></p> <ul style="list-style-type: none"> <li>● <b>Reflect</b> on the impact of positive and negative role modeling.</li> <li>● <b>Model</b> agile values and principles in your context</li> <li>● <b>Identify</b> active and passive mentors who model agile principles and values.</li> </ul> <p><b>Model Resilience</b></p> <ul style="list-style-type: none"> <li>● <b>Recognise</b> how you are responsible for the circumstances of your life and your physical, emotional, mental and spiritual well-being.</li> <li>● <b>Vocalize</b> how an action or event has impacted your ethics, values or principles</li> </ul>

	<ul style="list-style-type: none"> <li>● <b>Reflect</b> with others on how to increase your resilience in difficult situations.</li> </ul> <p><b>Be in the Moment</b></p> <ul style="list-style-type: none"> <li>● <b>Practice</b> speaking with candor.</li> <li>● <b>Display</b> curiosity, and <b>recognise</b> the value of diverse perspectives.</li> <li>● <b>Reflect</b> on areas for improvement in how you show up.</li> </ul>
<p><b>3 Practitioner</b></p>	<p><b>Being an Agilist</b></p> <ul style="list-style-type: none"> <li>● <b>Challenge</b> beliefs that hold us back, enabling a positive impact that creates the motivation to achieve anything.</li> <li>● <b>Model</b> asking for help, failing fast and being authentic in modeling a growth mindset.</li> <li>● <b>Demonstrate</b> continuous improvement &amp; transparency.</li> </ul> <p><b>Model Resilience</b></p> <ul style="list-style-type: none"> <li>● <b>Demonstrate</b> how to take full responsibility for the circumstances of your life in most contexts.</li> <li>● <b>Build</b> a plan to promote physical, emotional, and mental resilience to ensure your well-being.</li> </ul> <p><b>Be in the Moment</b></p> <ul style="list-style-type: none"> <li>● <b>Say</b> what is true for you and welcome others to express themselves.</li> <li>● <b>Recognize</b> toxic responses in self.</li> <li>● <b>Practice</b> being present in everyday interactions, even in difficult or stressful situations.</li> </ul>
<p><b>4 Guide</b></p>	<p><b>Being an Agilist</b></p> <ul style="list-style-type: none"> <li>● <b>Lead</b> others through transformational change in contexts that require courage and experimentation.</li> <li>● <b>Model</b> language to others as part of coaching and improving sensitivity to language across the system.</li> <li>● <b>Demonstrate</b> how to maintain ethical standards in challenging situations.</li> </ul> <p><b>Model Resilience</b></p> <ul style="list-style-type: none"> <li>● <b>Demonstrate</b> how to take full responsibility for the circumstances of your life in the moment.</li> <li>● <b>Exhibit</b> the ability and vulnerability to tell personal stories that have contributed to your resilience.</li> </ul>

	<ul style="list-style-type: none"> <li>● <b>Evaluate</b> your well-being, what impacts it, others, and the wider system.</li> <li>● <b>Show</b> the capability to remain composed when facing pressure from external sources and assist them in making progress.</li> </ul> <p><b>Be in the Moment</b></p> <ul style="list-style-type: none"> <li>● <b>Support</b> others to express themselves with candor.</li> <li>● <b>Coach</b> others to reflect on their self-mastery.</li> <li>● <b>Recognise</b> unhelpful feelings, thoughts or instincts and pivot towards a constructive response.</li> </ul>
<p><b>5 Catalyst</b></p>	<p><b>Being an Agilist</b></p> <ul style="list-style-type: none"> <li>● <b>Inspire</b> others to align their actions with their words and model agile principles and values.</li> <li>● <b>Lead</b> change by modeling a growth mindset and embracing new ways of thinking and doing.</li> <li>● <b>Be</b> a catalyst for innovation and creativity by modeling experimentation and taking calculated risks.</li> <li>● <b>Share</b> personal experience and insights in the agile community through public speaking, writing, or other avenues.</li> </ul> <p><b>Model Resilience</b></p> <ul style="list-style-type: none"> <li>● <b>Live</b> your values and principles at all times, in any situation.</li> <li>● <b>Support</b> others in restoring balance after failed experiments.</li> </ul> <p><b>Be in the Moment</b></p> <ul style="list-style-type: none"> <li>● <b>Appraise</b> your ability to speak your truth in challenging circumstances.</li> <li>● <b>Create</b> a culture of candor and feedback.</li> <li>● <b>Embody</b> curiosity in all interactions.</li> </ul>

**Leading for Growth**

Leading for Growth builds on role modelling and, at its highest level, is about creating a continuous learning, coaching and innovation culture where people can develop themselves and achieve their full potential. As a leader, you become an advocate for people.

- **Continuous Learning Culture:** A leader who is focused on growth recognises the importance of continuous learning and that many situations offer learning, both for themselves and for their organizations.
- **Innovation Culture:** Leaders who are focused on growth can foster a culture where innovation and creativity can thrive, leaning into the discomfort of trying something new and encouraging others when facing a fear of failure. Diversity of people and opinions, debate over no debate, creating the time and space for it to happen
- **Coaching Culture:** Leaders are role models for the behaviors they wish to see in their organization. Leaders foster a culture where trust, vulnerability and authentic connection can thrive. There is an interdependence between these qualities, and their presence helps build self-awareness. Leading for growth also recognises the long-term need for sustainability, accountability and resilience, supported by diversity, inclusion and continuous learning.

**Competency Level Definitions:**

Level	Reflection
<p><b>1</b> <b>Beginner</b></p>	<p><b>Continuous Learning Culture</b></p> <ul style="list-style-type: none"> <li>● <b>Understand</b> the role learning plays in creating a healthy organisation.</li> <li>● <b>Recognise</b> the impact you as a leader can have in creating a learning culture.</li> <li>● <b>Describe</b> the link between learning and continuous improvement.</li> </ul> <p><b>Innovation Culture</b></p> <ul style="list-style-type: none"> <li>● <b>Understand</b> the role innovation plays in the organisation's success.</li> <li>● <b>Describe</b> the link between innovation and thriving in the marketplace.</li> <li>● <b>Recognise</b> the role you can play in creating an environment for innovation.</li> </ul> <p><b>Coaching Culture</b></p> <ul style="list-style-type: none"> <li>● <b>Describe</b> how a coaching approach might create agency for others.</li> <li>● <b>Identify</b> why it is important for everyone to learn coaching skills.</li> <li>● <b>Explain</b> how listening and questioning can deepen someone's thinking.</li> </ul>



<p><b>2</b> <b>Advanced Beginner</b></p>	<p><b>Continuous Learning Culture</b></p> <ul style="list-style-type: none"> <li>● <b>Support</b> others in their learning journeys.</li> <li>● <b>Demonstrate</b> your continuous learning journey.</li> <li>● <b>Create</b> space for learning as part of people's work.</li> </ul> <p><b>Innovation Culture</b></p> <ul style="list-style-type: none"> <li>● <b>Explain</b> an environment that supports innovation.</li> <li>● <b>Support</b> others in making trade-offs that allow for innovation.</li> <li>● <b>Recognise</b> the role that failure, collaboration and experimentation play in innovation.</li> </ul> <p><b>Coaching Culture</b></p> <ul style="list-style-type: none"> <li>● <b>Explain</b> how the manager as a coach is important in an agile organization.</li> <li>● <b>Apply</b> a coaching approach.</li> <li>● <b>Support</b> others in growing coaching skills.</li> </ul>
<p><b>3</b> <b>Practitioner</b></p>	<p><b>Continuous Learning Culture</b></p> <ul style="list-style-type: none"> <li>● <b>Create</b> an environment for others that activity supports learning.</li> <li>● <b>Demonstrate</b> through your learning the art of reflective practice.</li> <li>● <b>Encourage</b> others to connect &amp; grow, to give feedback to create lifelong learning opportunities.</li> </ul> <p><b>Innovation Culture</b></p> <ul style="list-style-type: none"> <li>● <b>Create</b> an environment for others that activity supports innovation.</li> <li>● <b>Support</b> others in seeing failure as integral to innovation.</li> </ul> <p><b>Coaching Culture</b></p> <ul style="list-style-type: none"> <li>● <b>Demonstrate</b> a shift from a directive to a non-directive approach.</li> <li>● <b>Create</b> an environment that enables a coaching approach.</li> </ul>
<p><b>4</b> <b>Guide</b></p>	<p><b>Continuous Learning Culture</b></p> <ul style="list-style-type: none"> <li>● <b>Appraise</b> your approach to learning and adapting.</li> <li>● <b>Teach</b> others to apply reflective learning.</li> <li>● <b>Apply</b> structures and policies that evolve the culture to focus on learning.</li> </ul>

	<p><b>Innovation Culture</b></p> <ul style="list-style-type: none"> <li>● <b>Apply</b> structures and policies that evolve the culture to focus on innovation.</li> <li>● <b>Teach</b> others techniques</li> <li>● <b>Challenge</b> other business areas to allow for innovation and remove the barriers to do so.</li> </ul> <p><b>Coaching Culture</b></p> <ul style="list-style-type: none"> <li>● <b>Apply</b> structures and policies that evolve the culture to focus on coaching.</li> <li>● <b>Advocate</b> for a coaching approach and help other business areas apply.</li> </ul>
<p><b>5 Catalyst</b></p>	<p><b>Continuous Learning Culture</b></p> <ul style="list-style-type: none"> <li>● <b>Nurture</b> a learning culture in the face of resistance.</li> <li>● <b>Ignite</b> others to unleash their true potential.</li> <li>● <b>Introduce</b> new ways of learning in the community.</li> </ul> <p><b>Innovation Culture</b></p> <ul style="list-style-type: none"> <li>● <b>Foster</b> innovation in areas that have faced challenges in the past and unlock new possibilities.</li> <li>● <b>Inspire</b> others to innovate.</li> <li>● <b>Share</b> novel ways of innovating in the community.</li> </ul> <p><b>Coaching Culture</b></p> <ul style="list-style-type: none"> <li>● <b>Establish</b> coaching as the default approach across the organization.</li> <li>● <b>Motivate</b> and encourage others to become coaches and share their knowledge and expertise with other prospective coaches.</li> <li>● <b>Share</b> new approaches to creating a coaching culture with others in the community.</li> </ul>

## Transforming

Transformation is a continuous activity that allows organizations to adapt and thrive in an ever-changing world; transforming is not just going from a current state to a new state. As a transformation agent, you guide sustainable change that allows people to be more effective and learn how to change for themselves.

You will be familiar with organizational design concepts that will help client organizations achieve greater business agility.

## **Organizational Change**

Organizations are complex, and changing them is even more complex. An empirical and informed approach to the change process improves the chances of success of a transformation. This approach is a continuous journey, a process of organizational evolution.

Successfully helping an organization with change needs a certain level of emotional intelligence (see Self-Mastery) and skills in areas such as:

- **Introducing Change**

- Context for change - Taking the current context & future possible context of Organizational Design and explaining the reasons we need/want to change or not change (for example if there is no appetite).
- Complexity conscious - helping your client understand that organizations are complex, so change should be empirical and people-driven rather than plan-driven.
- Culture awareness - helping your client understand the culture of the organization so that they can introduce appropriate change.

- **Navigating Change**

- Empirical change: establishing methods for transparency, inspection and adaptation
- Facilitate change events & activities - from launching a single team to guiding a complete organization redesign.
- Ownership - Involving people impacted by the change in designing and implementing change.
- Safe-to-fail experiments - establish a safe environment where the expectation is that some experiments will fail.
- Working with organizational tensions to navigate change.

- **Sustaining Change**

- Create sustainable change: aid the organization in learning how to create and navigate change on their own
- Build internal capacity: Grow agile coaching capability in others
- Help change go viral: help create an environment where positive change can spread
- Learning culture: seek ways to help people build learning into the way they work
- Deprecating ways of working and process: remove those that no longer serve the people.

**Competency Level Definitions:**

Level	Reflection
<p><b>1</b> <b>Beginner</b></p>	<p><b>Introducing Change</b></p> <ul style="list-style-type: none"> <li>● <b>List</b> at least three emerging global challenges and how each makes our world more complex, unpredictable and volatile.</li> <li>● <b>Illustrate</b> how a healthy agile approach supports the complexity and uncertainty of work.</li> <li>● <b>Describe</b> the nature of complex systems.</li> </ul> <p><b>Navigating Change</b></p> <ul style="list-style-type: none"> <li>● <b>Discuss</b> at least two ways to help the team respond to impediments.</li> <li>● <b>Identify</b> at least three common organizational impediments outside a team's scope that impact effectiveness.</li> <li>● <b>Describe</b> how transparency, inspection and adaptation can support change.</li> </ul> <p><b>Sustaining Change</b></p> <ul style="list-style-type: none"> <li>● <b>Describe</b> the role continuous learning plays in sustaining change.</li> <li>● <b>Discuss</b> how introducing change will require organizations to stop or adapt existing ways of working.</li> </ul>
<p><b>2</b> <b>Advanced Beginner</b></p>	<p><b>Introducing Change</b></p> <ul style="list-style-type: none"> <li>● <b>Explain</b> the importance of discovering an organizational culture that supports shared accountability with teams.</li> <li>● <b>Explore</b> at least one tool or technique to identify, understand and influence the culture within an organization.</li> <li>● <b>Explain</b> how to approach an organizational change in a complex system.</li> </ul> <p><b>Navigating Change</b></p> <ul style="list-style-type: none"> <li>● <b>Explain</b> the importance of taking a systemic view, helping stakeholders understand the whole system.</li> <li>● <b>Demonstrate</b> how an effective approach to change should be flexible and adaptive to different situations.</li> </ul>

	<ul style="list-style-type: none"> <li>● <b>Apply</b> at least two techniques to effect change outside of the team to help them be more productive.</li> <li>● <b>Experiment</b> with at least one large-scale, participatory meeting format to facilitate/kick off people-driven change.</li> </ul> <p><b>Sustaining Change</b></p> <ul style="list-style-type: none"> <li>● <b>Explain</b> the role that building capability in people has on transformation sustainability.</li> <li>● <b>Discuss</b> how to foster the courage in leaders on all levels to continue change.</li> <li>● <b>Describe</b> a learning culture.</li> </ul>
<p><b>3 Practitioner</b></p>	<p><b>Introducing Change</b></p> <ul style="list-style-type: none"> <li>● <b>Analyze</b> how to approach change differently based on existing organizational culture, system complexity, and the influence this has on speed, risk, and receptiveness to change.</li> <li>● <b>Implement</b> organizational change referencing a known change framework or technique to benefit from industry-level expertise.</li> <li>● <b>Facilitate</b> a clear understanding of an organization's unique and compelling reasons for being agile.</li> </ul> <p><b>Navigating Change</b></p> <ul style="list-style-type: none"> <li>● <b>Describe</b> how organizational change impacts people and list three benefits of involving them in the change process.</li> <li>● <b>Analyze</b> your approach to a complex intervention that addresses an organisational dysfunction's root cause(s).</li> <li>● <b>Demonstrate</b> at least two tangible examples of how you changed the culture of your team or organization.</li> <li>● <b>Coached</b> multiple groups to design/conduct people-driven change using large-scale, participatory meeting formats.</li> </ul> <p><b>Sustaining Change</b></p> <ul style="list-style-type: none"> <li>● <b>Discuss</b> transformation sustainability and give two approaches to developing the ability to own sustainable changes.</li> </ul>

	<ul style="list-style-type: none"> <li>● <b>Evaluate</b> an experience with supporting the work of multiple teams in an organization and identify potential improvements.</li> <li>● <b>Grow</b> agile coaching capabilities in others, including transformation, some core skills and self-mastery.</li> </ul>
<p><b>4</b> <b>Guide</b></p>	<p><b>Introducing Change</b></p> <ul style="list-style-type: none"> <li>● <b>Lead</b> an organizational change in a way that allows adjustment based on inspection of that change.</li> <li>● <b>Implement</b> context-sensitive adaptations using appropriate techniques from various change frameworks.</li> <li>● <b>Plan</b> and contribute to a significant or high-profile organizational change.</li> </ul> <p><b>Navigating Change</b></p> <ul style="list-style-type: none"> <li>● <b>Demonstrate</b> competency in successfully recognising and applying three change frameworks.</li> <li>● <b>Demonstrate</b> success working with senior leaders to foster improvement at the organizational level.</li> <li>● <b>Explain</b> various approaches for creating an organizational change strategy leveraging agile principles.</li> <li>● <b>Demonstrate</b> the ability to remove organizational impediments by changing the environment or the organizational structure.</li> </ul> <p><b>Sustaining Change</b></p> <ul style="list-style-type: none"> <li>● <b>Create</b> a self-sustained culture of continuous learning.</li> <li>● <b>Enable</b> senior leaders to support teams in removing systemic impediments.</li> <li>● <b>Identify</b> and remove deprecated ways of working that slow down or hinder people’s ability to change.</li> </ul>
<p><b>5</b> <b>Catalyst</b></p>	<p><b>Introducing Change</b></p> <ul style="list-style-type: none"> <li>● <b>Create</b> a tool, technique or practice that helps introduce change to organizations and share it with others.</li> <li>● <b>Appraise</b> several documented case studies you have created for different types of organizations on how you introduced change.</li> </ul> <p><b>Navigating Change</b></p>

	<ul style="list-style-type: none"> <li>● <b>Create</b> a tool, technique or practice that helps navigate change in organizations and share it with others.</li> <li>● <b>Mentor</b> people who are leading change initiatives.</li> </ul> <p><b>Sustaining Change</b></p> <ul style="list-style-type: none"> <li>● <b>Evaluate</b> multiple change programs in which you have been involved at least one year after leaving the organization and share the results with others.</li> </ul>
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## Organizational Design

As a transformation agent, you grow knowledge that will support an organization's transformation to become more adaptable, resilient, outcome-focused, and people-centric. We do this by taking a system view, helping clients design experiments introducing them to new organizational principles and patterns. This affords your business the freedom and flexibility to achieve its purpose. No matter what the future brings.

- **Organizational Operating System** - knowledge of approaches that could help organizations better achieve their goals and support the culture you want to create:
  - Decision making - how power is shared and how decisions get made.
  - Structures, policies and metrics - how we organize ourselves and work together in a resilient, adaptable way, focused on outcomes.
  - Innovation - how we learn and discover new ideas.
  - Roles and teams - how we take responsibility for getting work done.
- **Organize Around the Delivery of Value:** the organization is designed for the delivery of value aligned with healthy decision-making no matter the complexity of the organization.
- **People Advocacy** - organizations are made up of people, and they are the center of everything we do.
  - Create policies that include all people and allow for diversity of thinking.
  - Advocate for people's growth, well-being, and create space for peoples self-care.
  - Purpose - what's the change we want to see in the world, even beyond making money.
  - Motivation - ensuring that extrinsic and intrinsic motivation are balanced and aligned with the organization's goals.

**Competency Level Definitions:**

Level	Reflection
<p><b>1</b> <b>Beginner</b></p>	<p><b>Organizational Operating System</b></p> <ul style="list-style-type: none"> <li>● <b>Identify</b> at least three challenges an organization might face when undertaking an agile approach beyond a single team.</li> <li>● <b>Describe</b> the characteristics organizations need to develop to face today's world and market challenges.</li> </ul> <p><b>Organize Around the Delivery of Value</b></p> <ul style="list-style-type: none"> <li>● <b>Describe</b> how the agile principles change an organization's approach to delivering value.</li> <li>● <b>Describe</b> what is valuable, recognizing that there are different types.</li> </ul> <p><b>People Advocacy</b></p> <ul style="list-style-type: none"> <li>● <b>List</b> at least three ways traditional management changes in the Agile workplace.</li> <li>● <b>Describe</b> the value of having a clear and compelling vision.</li> <li>● <b>Describe</b> intrinsic motivation and why it is important.</li> </ul>
<p><b>2</b> <b>Advanced Beginner</b></p>	<p><b>Organizational Operating System</b></p> <ul style="list-style-type: none"> <li>● <b>Explain</b> how culture and the way value is interpreted are related and how that relationship will affect organizational outcomes.</li> <li>● <b>Guide</b> understanding at least three benefits and drawbacks of feature and component teams.</li> <li>● <b>Explain</b> how an organization's structures, policies and measures impact its culture.</li> </ul> <p><b>Organize Around the Delivery of Value</b></p> <ul style="list-style-type: none"> <li>● <b>Facilitate</b> at least three techniques for visualizing, managing, or reducing dependencies between teams.</li> <li>● <b>Describe</b> at least three challenges to creating value flow when applying agile approaches across an organizational system.</li> <li>● <b>Teach</b> three ways to help a team align their goals with those of the organization.</li> </ul> <p><b>People Advocacy</b></p>



	<ul style="list-style-type: none"> <li>● <b>Apply</b> at least two patterns for increasing trust and collaboration between multiple teams.</li> <li>● <b>Identify</b> at least three organizational practices that increase people's autonomy.</li> <li>● <b>Teach</b> the value of investing in people's growth over just training them to do a job.</li> </ul>
<p><b>3 Practitioner</b></p>	<p><b>Organizational Operating System</b></p> <ul style="list-style-type: none"> <li>● <b>Experiment</b> with at least three techniques to improve inter-team collaboration.</li> <li>● <b>Apply</b> scaling practices and methods that can be helpful without adding the overhead of an entire scaling framework when necessary.</li> <li>● <b>Assess</b> organizational structures, policies and metrics, and describe how they impact organization culture and create value.</li> </ul> <p><b>Organize Around the Delivery of Value</b></p> <ul style="list-style-type: none"> <li>● <b>Describe</b> an organizational design that enables multiple teams to work on the same product.</li> <li>● <b>Contrast</b> at least two patterns when applying Product Ownership across multiple teams.</li> <li>● <b>Facilitate</b> growth of understanding of what is value and what products are.</li> </ul> <p><b>People Advocacy</b></p> <ul style="list-style-type: none"> <li>● <b>Facilitate</b> and nurture the growth of people.</li> <li>● <b>Apply</b> practices that give agency to people and teams.</li> <li>● <b>Facilitate</b> the movement of decision-making away from management towards the people involved in the work.</li> </ul>
<p><b>4 Guide</b></p>	<p><b>Organizational Operating System</b></p> <ul style="list-style-type: none"> <li>● <b>Demonstrate</b> the ability to design structures to help organizations become the most straightforward ecosystem required to achieve their mission.</li> <li>● <b>Evaluate</b>, where appropriate, different scaling frameworks to help organizations identify the right patterns for their context.</li> <li>● <b>Recognize</b> and connect interdependencies that unlock teams' reflection, learning, and growth.</li> </ul> <p><b>Organize Around the Delivery of Value</b></p>

	<ul style="list-style-type: none"> <li>● <b>Apply</b> and promote a waste-intolerant mindset to enable teams to operate as an interactive network focused on continuous and sustainable delivery of customer value.</li> <li>● <b>Identify</b> three factors to introduce and cultivate in an organization, and describe how each enables and enhances agility and value delivery.</li> </ul> <p><b>People Advocacy</b></p> <ul style="list-style-type: none"> <li>● <b>Implement</b> an organizational structure that puts people at the center of decision and strategy making.</li> <li>● <b>Demonstrate</b> experience in fostering a purpose-driven mindset at all levels of the organization.</li> </ul>
<p><b>5 Catalyst</b></p>	<p><b>Organizational Operating System</b></p> <ul style="list-style-type: none"> <li>● <b>Promote</b> awareness of how organizational design decisions affect ways of working.</li> <li>● <b>Share</b> new patterns of safe or experimental organizational design change at leading industry-level events.</li> </ul> <p><b>Organize Around the Delivery of Value</b></p> <ul style="list-style-type: none"> <li>● <b>Create</b> structures and policies that systemically optimize flow and value creation at all levels of the organization.</li> </ul> <p><b>People Advocacy</b></p> <ul style="list-style-type: none"> <li>● <b>Reflect</b> on the impact of organizational design patterns on culture, mindset and ways of working.</li> <li>● <b>Implement</b> organizational structures centered on human well-being and pluralistic thinking.</li> <li>● <b>Design</b> resilient structures which allow the client to develop flourishing resonant leadership styles through changing circumstances.</li> </ul>

**Domain Knowledge (the outside ring)**

The domain knowledge areas around the outside of the Wheel represent supporting expertise that may better help you serve the client and build trust with the team or organization. However, there is a risk: the more domain experience you have, the harder it will be to remain objective in your coaching. Therefore, it may be valid for a coach to allow a reduction of expertise in some areas (i.e., choosing not to stay

up-to-date with the latest changes in technology) while seeking to increase knowledge in other areas.

While crafting the Wheel, we debated for a long time whether things like engineering practices and technical excellence should be represented under Knowing the Team. We specifically chose not to write about these things—e. However, knowledge of your team's technical practices conceptually live here on the wheel.

Similarly, you can consider things like Lean UX and Business Modeling part of Knowing the Business, and scaling frameworks and organizational change practices may be part of Knowing the Organization as you serve the organization.

Domain knowledge encompasses expertise in the work of the team, the business and the organization Including (but not limited to):

## Knowing the Team

- Understanding current technical practices, and identifying practices that could be improved or adapted to increase agility.
- Technical understanding of the product a team is delivering or products across the organization.
- Growing relationships with the people in your team.

## Knowing the Business

- Understanding the marketplace in which business is being conducted.
- Understanding the needs and concerns of users, customers, and other business stakeholders.

## Knowing the Organization

- Knowledge of structures, policies, and operating models.
- Understanding relationships between people, teams, and departments.
- Understanding the organizational culture.

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## Style Guide:

### Decisions:

If we spin for more than five minutes, put it aside for a week to think about it. If we still can’t decide, Mark Summers gets the final call as the Product Owner.

## External References

Avoid citing specific frameworks as a solution or focus. While a given framework may be the current “gold standard” for a skill, it may not always be and there are usually other frameworks that also can provide assistance.

## Naming Conventions

**Competency Area:** These are the “wedges” of the pie. These are the broad areas that the skills of Agile Coaching are categorized into. We do not measure Competency Area on the Dreyfus scale. Example: Leading, Coaching.

**Competency:** Competency Areas are made up of two or more Competencies and are the primary working item in the Growth Wheel. Competencies appear on the outside edge of the wheel. Dreyfus measurement is done at the Competency level. Example: Role Modeling, Coaching Mindset.

**Skill:** Skills are how a Competency is subdivided to create the Dreyfus objectives for a learning level. Skills do not appear in the Wheel diagram. Example: Mentee Focus, Believe in the client.

## Content Format of Sections:

### Introducing Competency Area Format (The 9 core)

- First paragraph copies the paragraph from “Nine Competencies”. Following paragraphs create context to the competency area. The goal is there is enough context to allow the reader to “Google” for more.
- Goal is to not change the first paragraph. Exceptions are possible.
- Each of the nine competency areas follow a three part format
  - Definition: What is it
  - Google-able: Enough information to go deeper into this concept
  - Why: Why is this Competency important to the profession of Agile Coaching
- Roughly ½ page of text

### Introducing Competency (The 19 specific)

- Introduction is written in a “Why is this important” format.
- Bullets provide the specific skills that make up the competency
- ~3 Skill Sub-Bullets
- Roughly ½ page of text

#### Dreyfus Scale on Skills:

- Use Bloom's Taxonomy and Scrum Alliance LO format as a guideline for creating the specific measures.
- ~3 bullets per Skill sub-bullet

#### Language and Formatting:

- We are using American English, not proper Queen's English (sorry).
- We are writing to a single user, not to the generic. "You will"
- We are writing to all roles, not just the coach. "Using Agile Coaching Skills" not "As an Agile Coach".
- Agile and Lean are capitalized
- Avoid negative language
- Bullets should be written as complete sentences and end in a period. "Implied" complete sentences, like Scrum Alliance learning objectives are acceptable.