



“Certification is the by-product; Learning is the product.”

Agile Team Facilitation & Coaching Track

Summary

Certification	ICAgile Certified Expert – Team Coaching
Abbreviation	ICE-TC
Prerequisite(s)	ICP (ICAgile Certified Professional) or equivalent
Classroom Duration	5-6
Number of CECs	2 (optional)
Number of Subjects	
Number of Themes	29
Status	Done

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Purpose

The purpose of the Agile Team Facilitation and Coaching track is to introduce learners to the concept of facilitating and coaching in the Agile context. It covers the roles and skills needed by an Agile Team Facilitator and Coach, to appropriately lead and effectively facilitate, coach, mentor and teach Agile teams.



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Overview

The Agile Team Facilitation & Coaching track will:

- Explore the basics of group facilitation tools and techniques and provide the learner the skills and knowledge to be able to apply these principles to group interactions for more productive discussions and better management of time and resources.
- Introduce the concepts of team development and provide the learner with the knowledge of how to start and grow teams through self-awareness, understanding of team dynamics and the organizational system.
- Provide the learner with an understanding of the mindset, role, and responsibilities of an Agile team facilitator and an Agile coach. The learner will be able to differentiate between mentoring, facilitating, consulting and coaching and will also gain the skills needed to communicate and coach effectively, and create a safe environment for healthy conflict and meaningful collaboration.
- Explore the common hurdles to implementing Agile practices and provide the learner with skills to help teams overcome them.

Track Subjects

1. The Agile Coach Roles
The purpose of this subject is to understand the mindsets, skillsets, maturity and scope of the Agile team facilitator and coach.
2. Coach as Facilitator
The purpose of this subject is to understand the coach as facilitator, including techniques, skills and mindset.
3. Skillfully Facilitating the Agile Practices
The purpose of this subject is to understand that the primary role of the Agile team facilitator or coach is to empower the Agile team toward a successful outcome. This requires identifying common hurdles to the implementation of key Agile practices, as well as applying the coaching skills needed to help teams overcome their own hurdles and successfully execute the practice.
4. Coach as Professional Coach
The purpose of this subject is to understand the mindset, competencies and concepts of the Agile coach in the role of professional coach.
5. Coach as Mentor
The purpose of this subject is to understand techniques and mindsets for mentoring Agile roles, practices and frameworks.
6. Coach as Teacher
The purpose of this subject is to understand techniques and mindsets for teaching Agile roles, practices and frameworks.
7. Teams
The purpose of this subject is to understand the startup, growth, conflict and health of a team from the perspective of an Agile coach.

Types of Agile Coaches

The Agile Team Facilitation and Coaching Track differentiates between three different types of Agile stewards: the Agile Team Facilitator, the Agile Coach and the Enterprise Agile Coach. Each type of steward has progressively more experience and broader responsibilities within the organization. This track currently addresses learning objectives for the Agile Team Facilitator and continues on to the Agile Coach. The ICAgile Coach designation requires all eight topics’ learning objectives to be completed. The learning objectives for an Enterprise Agile Coach are covered in a separate track.

Agile Team Facilitator

An Agile Team Facilitator is developing the basic skills of facilitation, mentoring or training and conscious communication, typically within the confines of one or two Agile teams. An Agile Team Facilitator is not responsible (or qualified according to this curriculum) for Agile adoption or transformation initiatives but rather they are more suited to facilitate the activities of an Agile team.

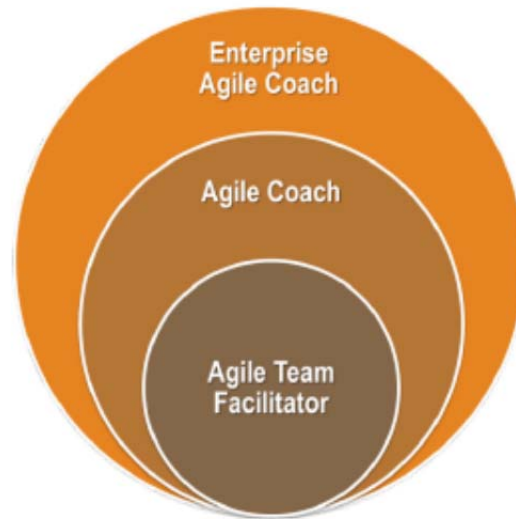
Agile Coach

An Agile Coach is an ATF who has achieved a high level in lean/Agile practices and one or more knowledge domains (technical, business, etc.) while having developed some professional coaching skills and a significant level of skill in facilitation and mentoring and/or training. The ICP-TC’s purview is multi-team, starting up new teams, mentoring and looking out toward the wider organization.

Enterprise Agile Coach

The Enterprise Agile Coach (not addressed in this track) is an Agile Coach who has achieved advanced systems coaching, organizational development, culture, change management and leadership skills and uses those skills to affect organizations at large.

The Enterprise Agile Coach works at all levels in an organization to help the organization use Agile as a strategic asset for business value generation, which often includes culture change.





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Track Certifications

Continuing Education Certifications

Two Continuing Education Certifications (CECs) are available in the Team Facilitation & Coaching track:

1. ICAgile Certified Professional – Team Facilitation
2. ICAgile Certified Professional – Coaching

CECs are optional intermediate certifications that recognize student learning as they proceed through tracks of study. In the Team Facilitation & Coaching track, a training organization is permitted to offer a CEC based on:

1. Inclusion of LOs,
2. Class duration, and
3. In-class evaluation.

Expert

Expert certifications cannot be granted by training organizations; individuals must apply to directly ICAgile to receive them. The expert certification in the Agile Team Facilitation & Coaching track is the ICAgile Certified Expert – Coaching (ICE-C).

An individual cannot become an ICAgile Expert through learning alone. A learner is qualified to become an ICE-C after completing the requirements for the track gate. In all tracks, requirements to become an ICAgile Expert generally include:

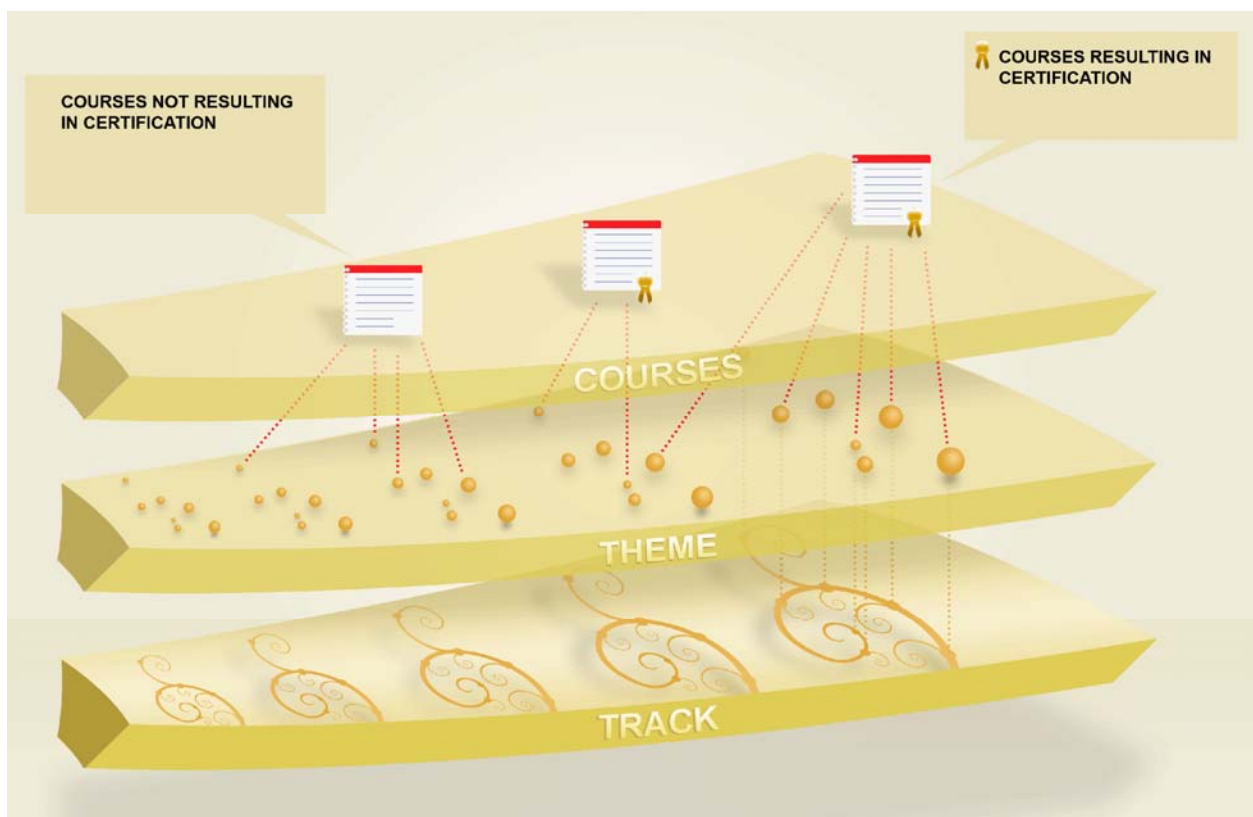
1. Receiving credit for all Themes in the track,
2. Obtaining real-life experience, and
3. Completing a competency evaluation.

Gate details for the Agile Team Coaching & Facilitation track will be defined and publicly posted Q3 2013.

Credit-Only Classes

Training organizations may choose to offer non-certification classes. Non-certification classes (credit-only classes) are valid for transcript credit and satisfy the classwork section of the Expert gate for that track. Additionally, students who attend a class that offers certification but who do not pass the certification evaluation will receive credit for the classwork but they will not receive the class’s associated Continuing Education Certification.

Students are not required to earn a track’s CECs in order to apply for Expert gate evaluation; they are only required to earn class credit.



Future Iterations

After the Agile Software Design & Development track has been used by training organizations and learners throughout the Agile community, we will solicit feedback and modify the track.

Learning Objectives

Acceptance Criteria

To be acceptable, material covering all learning objectives is expected to be detailed, with a focus on active learning opportunities, such as exercises, games, discussion, and hands-on experience. While lectures, handouts and presentation materials are often necessary aspects of a learning session, we recognize that education is more impactful and long-lasting when a student is actively engaged in the learning process.

1. The Agile Coach Roles: Mindsets, skillsets, maturity, scope

1.1 The Agile Team Facilitator Mindset

1.1.1 Defining Agile Team Facilitation

Agile Team Facilitators are journeyman Agile Coaches who keep an Agile team running and growing.

The purpose of this LO is to define the purpose, mindset and functions of an Agile Team Facilitator.

To be acceptable, this should include the concept that the most basic the purpose of an Agile Team Facilitator is to facilitate the Agile practices, foster collaboration amongst team members, and generally support a self-organized team.

1.1.2. Agile Team Facilitator Behaviors

Agile Team Facilitators behave in ways that are consistent with Agile.

The purpose of this LO is to set the expectation that Agile Team Facilitators behave in ways consistent with Agile and are Agile role models. This includes becoming aware of, and growing into, the embodiment of Agile that one expects from an Agile Coach, namely embracing servant leadership and displaying the behaviors that come with key mindset shifts detailed in *4.1 Agile Coaching Mindset*.

1.2. Development Path for Agile Coaching

1.2.1. Defining an Agile Coaching Development Path

Effective Agile coaching requires that people take their development one step at a time, obtaining mastery at each step before moving on.

The purpose of this LO is to lay out the developmental progression from Agile Team Facilitator to Agile Coach to Enterprise Coach. An Agile Team Facilitator (ATF) is a journeyman Agile Coach. Knowledgeable in lean/Agile practices, the

ATF is developing the basic skills of facilitation, mentoring or training and conscious communication, often within the confines of one or a few Agile teams. The Agile Coach is an ATF who has achieved an expert level in lean/Agile practices and one or more knowledge domains (technical, business, etc.) while having developed some professional coaching skills and a significant level of skill in facilitation and mentoring and/or training. The Agile Coach’s purview is multi-team and looking out toward the wider organization. The Enterprise Coach (not addressed in this track) is an Agile Coach who has achieved advanced systems coaching, organizational development, culture change and leadership skills and uses those skills to affect organizations at large. The Enterprise Coach works at all levels in an organization to help the organization use Agile as a strategic asset of culture change and business value generation.

1.2.2. Assessing one’s ability to serve the team

Teams move into patterns of health and dysfunction continually. The Agile Team Facilitator or Agile Coach uses diagnostics to determine the nature of the situation so that they can decide whether to serve the team solo or get help.

The purpose of this LO is to provide the learner with a one or more models for assessing healthy team functioning, especially the ability to identify clearly dysfunctional behaviors or circumstances. This LO also provides suggestions for dealing with such dysfunctional patterns and offers indications for when to call in more advanced Agile coaching skill.

1.2.3. Calling for More Advanced Agile Coaching Skill

Agile Team Facilitators and Agile Coaches respect the current boundaries of their knowledge and skills and call in more advanced Agile coaching when needed.

The purpose of this LO is to set the expectation that Agile coaching is an ATF/AC/EAC team event. Successful Agile coaches (at any level) do not go it alone. Instead, they call on the skills and knowledge of the next developmental level when faced with situations they are not equipped to handle. For example, an Agile Team Facilitator would call on the help of an Agile Coach or Enterprise Agile Coach when faced with difficult conflict in the team, or when starting up a new team, or when the team has stagnated and is regressing. These are opportunities for the team to get the level of skill they need and for the Agile Team Facilitator to learn from the more advanced coaches. This LO will offer models(s) or diagnostic(s) that help the ATF know when to call for the assistance of an AC or an EAC.

1.3 The Agile Coaching Mindset

1.3.1 Defining Agile Coaching

Effective Agile coaches are clear about the purpose of their role and the mindset required to be a good (even great) Agile coach.

The purpose of this LO is to define the purpose and mindset of an Agile Coach. Agile coaching is defined as a set of behavioral competencies in this LO so that Agile coaches can see which behaviors to move away from and which to move toward. In addition, the various high level skill sets or disciplines of an Agile coach (coaching, facilitating, mentoring and teaching, etc.) are taught in this LO, to expose the learner to the full spectrum of the Agile Coach’s job.

1.3.2 Coach as role model

Effective Agile coaches are the “first Agilist.”

The purpose of this LO is to make the case that personally embodying the Agile values and principles is a key component of being an Agile Coach and to give the learner practical advice on how to do so.

1.3.3 Servant Leadership

Effective Agile coaches employ a “servant as leader” style when they take up leadership with people, teams and organizations.

The purpose of this LO is to explain and make practical the concept of servant leadership, going back to the roots of the idea as originally conceived by Robert Greenleaf. Specifically, that servant leadership means more than getting the team coffee and pizza and, in fact, guides an Agile Coach’s behavior in the proper application of “servant as leader” to build capacity in others, to remove one’s self from the center of the action and attention and to serve the best interests of what’s emerging in the environment.

1.3.4 Key Mindset shifts

Effective Agile coaches successfully make some key mindset shifts and serve as a living example of how one can thrive within these new mindsets.

The purpose of this LO is to expose the Agile Coach to key mindset shifts and help the coach see ways to live these shifts in their own lives. Key mindset shifts may include: focus on team improvement over specific results; focus on business value-driven delivery over achieving scope, schedule or budget targets; focus on the leverage in the present moment over the past or future; focus on staying curious and seeing the best in people over judging or manipulating; focus on assisting the team in achieving their commitment and learning when they do not achieve it rather than stepping in and doing it for them.

1.4 Responsibilities and Skills of the Coach

1.4.1 Roles and Responsibilities of the Coach

Effective Agile coaches know the parameters of their job. They avidly take up their responsibilities and help others take up theirs. They clearly articulate the difference (or overlap) between their role and that of others, such as product owner, project manager, program manager and functional manager.

The purpose of this LO is to list the duties and skills (as opposed to the mindset) of the Agile Coach job and contrast them with the duties of other roles (i.e. product owner, project manager, program manager and functional manager) so that the coach fully understands the difference between a coach and other team members and can negotiate their role within a given context of other roles in their organization so they can healthfully coexist and help others fully take up their roles in ways that enhance the practice of Agile. Note: In some organizations the coach may fill one or more additional roles on the team, in which case the purpose of this LO is to help them differentiate their own role boundaries and help others take up their roles fully and in ways that enhance the practice of Agile.

1.4.2. Skills of the Coach

Effective Agile coaches consciously choose which skills to employ in each moment to best serve the people, teams and organizations they coach.

The purpose of this LO is to provide guidance on how an Agile Coach chooses and/or combines the skills in each moment (coaching, mentoring, facilitating, instructing, leading, etc.) that will best serve the situation. Practical advice on which to choose and how, along with skills to cultivate the needed self-awareness and self-management are taught in this LO.

1.4.3. Calling for More Advanced Agile Coaching Skill

Agile Coaches respect the current boundaries of their knowledge and skills and call in more advanced Agile coaching when needed.

The purpose of this LO is to set the expectation that successful Agile coaches (at any level) do not go it alone. Instead, they call on the skills and knowledge of the next developmental level when faced with situations they are not equipped to handle. For example, an Agile Coach would likely call on the help of an Agile Enterprise Coach when faced with intractable conflict in a team, or when coaching leaders who are faced with making behavioral changes that enable Agile, or when working with a large-scale culture change. These are opportunities for the team or organization to get the level of skill they need and for the Agile Coach to learn from the Enterprise Agile Coach.

To be acceptable, this LO will offer models(s) or diagnostic(s) that help the AC know when to call for the assistance of an EAC.

1.4.4 Achieving self-awareness/self-management in the coach

Self-management is a critical Agile coaching skill that can be learned and increased.

The purpose of this LO is to help the learner understand one or more models of self-awareness that will impact their ability to be an effective Agile coach. Further, this LO is concerned with giving the learner techniques for managing themselves, their biases, assumptions and emotions within a coaching context. To be effective, the Agile coach must be both self-aware (e.g., know when she is

biased about a given topic) and use self-management (e.g., not let her bias affect how she facilitates the meeting). There are many models of self-awareness (e.g., emotional intelligence, Myers-Briggs, various personality inventories, various self-awareness mindfulness techniques) that can guide the coach. Most important is to choose at least one and apply it.

1.5. Setting boundaries for Coaching

1.5.1. Internal vs. External Coaches

Internal coaches and external coaches work under different constraints.

Understanding the differences and limitations between the two and being able to adapt is crucial to success.

The purpose of this LO is to understand the key differences between internal and external coaches, identify the unique challenges faced by internal coaches (i.e. maintaining neutrality and confidentiality, holding people accountable and challenging the status quo) and how to adapt given the current situation. Re: being an internal coach: help the learner understand the unique challenges of being an internal coach, and that it does not prevent them from maintaining the coaching stance (i.e. maintaining neutrality, not colluding, supporting the client’s agenda, etc.). Structures and approaches for maintaining the coaching position without compromising their job are covered here. Re: being an external coach: help the learner understand the unique challenges of being an external coach, such as the need for effective systems entry, treating the client system with respect for the choices it has made, balancing challenge with respecting the pace of change that can be assimilated, etc.

1.5.2 What is a coaching “contract”

When they begin work with a team and its business unit, effective Agile coaches make agreements with key stakeholders (e.g., management, the team) on how the coaching work will proceed. This involves those directly affected (e.g., the team) as well as those “paying for” or authorizing the coach’s services (e.g., management or sponsor).

The purpose of this LO is to help the learner understand the importance of a coaching contract, that it is not a “legal” contract but rather an agreement between the parties. How to negotiate such an agreement, why it’s important to coaching success, how it helps bound what the coach agrees to do (e.g., start-up and run a new Agile team for 3 months) and what the coach will not do (e.g., give performance management evaluations for team members), as well as what the “client” will do (e.g., provide training for the team, make a candidate Agile Team Facilitator available from within the team, etc.) are all components of this LO. Effective Agile coaches, whether they are internal employees or external consultants, see their work similarly to that of a collaborative consultant (see for

instance Peter Block, Flawless Consulting), which is why the coaching contract is an appropriate learning topic for all Agile coaches.

1.5.3 How to design a coaching alliance

A coaching alliance is the other side of the coaching contract. Where the contract provides the conditions for the work (boundaries, time, roles, etc.), the coaching alliance is less formal but more personal.

The purpose of this LO is to help the learner understand elements of designing a coaching alliance including creating rapport, key questions to ask, tone of the discussion, and hoped for outcomes. It answers questions such as how do the individuals or the team as a whole want to be coached? How would they like to receive feedback? How will the coach know when she has challenged the team “too far” or “not enough?” Will they help the coach get better at coaching them in the unique way they need to be coached?

2. Coach as Facilitator: Techniques, skills, mindsets

2.1. Facilitation & the Facilitator Stance

2.1.1. Definition of Facilitation

A facilitator is someone who helps a group identify common objectives and then offers group processes to achieve that defined outcome while maintaining neutrality.

The purpose of this LO is to level set on the definition of a facilitator as a neutral process owner for group work and decision making.

2.1.2. The Facilitator Stance

Facilitators consciously embody self-awareness, self-management, bias management, and convey openness and enthusiasm while maintaining an allegiance to the ‘power of teams’ over individual contributors.

The purpose of this LO is to help the learner understand and embody the characteristics of a good facilitator.

2.1.3. Agile Team Facilitator

An Agile Team Facilitator is both the Agile process owner and the facilitator of team practices.

The purpose of this LO is to help the learner effectively navigate the sometimes contradictory roles of unbiased facilitator and guardian of the Agile team practices.

2.2. Facilitating Meetings

2.2.1. Designing Meetings for Collaboration

Effective meetings have clear objectives, purpose, outcomes, a defined set of attendees, and an intended process for accomplishing the objectives.

The purpose of this LO is to provide the learner with a set of planning tools and techniques to design effective meetings, including a process to clearly identify the objectives and intended outcomes, a detailed facilitator guide or script, selecting the right participants, and identifying potential issues.

2.2.2. Using the Meeting Organizing Tools

Facilitated meetings are well structured and organized to provide consistency to the participants.

The purpose of this LO is to provide the learner with an understanding of common meeting tools, their purpose, and when and how to use them. Facilitators use a variety of meeting organization tools including; parking lot, group norms, and room setup.

2.2.3. Facilitating Full Participation

Great ideas come when all team members are involved, engaged and all ideas are shared.

The purpose of this LO is to expose the learner to different techniques to garner full participation without promoting chaos such as; brainstorming, silent working, prioritization, multi-voting, etc.

2.3. Facilitating Collaboration

2.3.1 Facilitating Collaborative Conversations

It's common for conversations to be mediocre – improving conversation quality leads to better understanding, fuller collaboration and remarkable results.

The purpose of this LO is to give learners techniques to facilitate better, more meaningful intra-team dialogues by maintaining awareness of one's own style, gaining understanding and acceptance of other styles, and increasing the capacity to give and receive feedback. Through better conversation teams establish shared understanding, context and create better results.

2.3.1 Facilitating Team Decision-making

Being able to come to decisions is a critical function for a team, frequently problematic, and essential for moving teams to action.

The purpose of this LO is to familiarize the learner with decision making frameworks and how to select an appropriate one. Additionally the learner should know how to clarify scope of authority and know when to move toward a decision and when to let it 'brew'.

2.4. Facilitating a meeting

2.4.1. Facilitating a meeting

The ability to neutrally facilitate a session cannot be demonstrated by reading or lectures alone, but only by doing it.

The purpose of this LO is to practice using some of the facilitator tools and mindsets in the context of an actual meeting that occurs within the Agile framework. This application allows the learner to practice the many facilitation skills they have just learned.

3. Skillfully Facilitating the Agile Practices

Preamble: The purpose of the learning objectives in this section is not to introduce the learner to the basics of the various Agile practices (that is covered in Agile Fundamentals), but to extend their knowledge of the practices from Shu to Ha including exposure to multiple facilitation methods, when to choose which, and how to avoid common facilitation pitfalls.

Each Agile practice has its own purpose, desired outcome and timebox. When facilitating, it is key to hold to these and to bring awareness to the team when they have veered off to help them come back.

3.1. Setting the Facilitation Context

3.1.1 Choosing the Level of Facilitation Intervention

Enhance the team’s self-sufficiency by consciously choosing the amount of facilitation.

The purpose of this LO is to help the learner to become choiceful about the amount of facilitation required, keeping in mind that the level of involvement differs as the team matures and as they begin to take on facilitation duties themselves.

3.1.2 Protecting the team boundary

Staying focused is critical to team success; therefore the Agile Team Facilitator or Agile Coach ensures that team members are able to focus on their commitment

The purpose of this LO is to equip the learner with techniques to foster and help the team build an environment of focus which includes the ability to push away interruptions, distractions and additional work. This LO illustrates how to use the Agile process to respectfully manage scope at the iteration and story level.

3.2. Facilitating Chartering Activities

3.2.1 Project Chartering

Performing Project Chartering is essential to the healthy start of an endeavor because it provides alignment.

The purpose of this LO is to bring the learner’s attention to what is essential and not essential in project chartering and to avoid common pitfalls of facilitating project chartering work sessions such as the absence of essential stakeholders, the business case being non-existent or goals not measurable, or business people or key team members not engaged. To create charters that have teams start with a shared context, product and team vision, and goals at all levels (individual, team, company, world). Note: Chartering is an activity and that may or may not result in a document.

3.2.2 Team Chartering

Performing team chartering helps align the team and gives them ownership around how they are going to work together.

The purpose of this LO is to bring awareness to the importance of team specific topics (e.g. definition of done, iteration length, stand up time) being defined by the actual team rather than management.

3.3. Facilitating Collaborative Meetings

3.3.1 Facilitating Release Planning

Release planning sessions are the cornerstone to setting business direction and establishing general expectations.

The purpose of this LO is to bring the learner’s attention to multiple ways of conducting release planning and when to choose one way over the other. Additionally, this LO educates the learner on avoiding common pitfalls of facilitating release planning sessions (e.g. over or under-committing, not accounting for bugs, spikes, and stabilization or planning to deliver lower value over higher value to accommodate an impediment or dependency, not delivering end-to-end value, etc.).

3.3.2 Facilitating Iteration Planning

Iteration planning sessions should be venues for discovering innovative approaches and knowledge sharing instead of just tasking out work.

The purpose of this LO is to bring the learner’s attention to multiple ways of conducting iteration planning and when to choose one over the other. Additionally, this LO emphasizes facilitation that enhances whole team collaboration, knowledge transfer, and cross-functional interaction and avoids common pitfalls (e.g. people are checked-out, business people getting into the “how”, domination by an expert, tool-centric interaction, etc.)

3.3.3 Facilitating Retrospectives

Retrospectives are one of the essential practices to ensure the team inspects and adapts its behavior and process. Retrospectives can either help the team continuously improve, or can create team dysfunctions.

The purpose of this LO is to familiarize the learner with multiple facilitation techniques for retrospectives and help them know when and how to use them to design and conduct retrospectives suitable for the team’s current situation. Retrospectives provide a fresh perspective on the previous iteration (or other timeframe) so that the team can surface issues, celebrate success, brainstorm solutions, and choose the top insights that will make a positive difference in the next iteration. This LO conveys the key elements (e.g. trust, safety check, ground rules, prime directive) that help retrospectives be productive and also illustrates how to work through common pitfalls (e.g. turning into a complaint session, lack of safety and fear of repercussions, non-collaborative, etc.).

3.3.4 Facilitating Stand-ups

Stand-ups are the heartbeat of the team’s cadence providing cohesion and commitment. Stand-ups can either launch the team into their work or become an empty, depleting ritual.

The purpose of this LO is to bring the learner’s attention to various techniques to keep the stand-up fresh while ensuring it remains useful and “on purpose”. This LO emphasizes facilitation that safeguards the stand-up as a venue for daily commitment, raising impediments, and keeping momentum while avoiding common pitfalls (i.e. going longer, reporting in, turning into a status meeting, veering into the purpose of another meeting, disengaged members, becomes boring, etc.).

3.4 Designing Meetings for Team Interaction

3.4.1. Meetings that run well are well designed

The purpose of this LO is to allow the learner to design their facilitation approach to different meetings and conversations under different circumstances and stages of team maturity so that they can see how the facilitation approach, process and organization will change in various situations.

3.5. Facilitating an Agile Practice

3.5.1 Facilitating an Agile Practice

It is essential to be able to change one’s facilitation style based on the maturity and needs of the group.

The purpose of this LO is to practice facilitating a meeting under various conditions, such as facilitating a standup, retrospective, or planning meeting, for a team new to Agile, for a team that has been using Agile for a while but has lost the purpose of the standup, and/or for a team that is fully functional and healthy with the standup. This application allows the learner to see how their facilitation style must adjust as the team matures (or regresses).

4. Coach as Professional Coach: Mindsets, competencies, concepts

Note: The term “client” is generically used to mean anyone the Agile coach coaches and applied to internal Agile coaches as well as external Agile coaches.

4.1. The Coaching Stance

Coaches consciously support the client’s goals and directions (their agenda) as opposed to the coach’s own agenda “for” the client.

The purpose of this LO is to help the learner understand and embody the characteristics of a professional coach (reference: ICF Competencies) and to land the idea that Agile coaches employ self-awareness and self-management to prevent imposing their agenda on the client.

4.1.1 Maintaining Neutrality

The purpose of this LO is to help the learner understand and embody the characteristics of a professional coach regarding being neutral with respect to the client’s values, preferences and decisions.

4.1.2 Self Awareness and Self-Management

The purpose of this LO is to help the learner understand and embody the characteristics of a professional coach by being aware of personal reactions and biases with respect to the client and managing those reactions in a way that supports the client’s autonomy and growth.

4.1.3 Holding the Client’s Agenda

The purpose of this LO is to help the learner understand and embody the characteristics of a professional coach in terms of helping the client identify and articulate the client’s own agenda for growth and development. The coach then supports this agenda in various ways.

4.1.4 No Colluding

The purpose of this LO is to help the learner understand and embody the characteristics of a professional coach regarding not colluding with the client when they do not strive fully for what they really want to achieve. Without criticism, the coach is a clear reflection when the client “plays small,” urging the client to reach for their goals.

4.2. The Coaching Conversation – Coaching for Action

4.2.1 Coaching for Action

Coaching conversations integrate various coaching skills into a fluid process that helps move individuals toward achieving their goals.

The purpose of this LO is to help the learner understand one or more models for conducting the coaching conversation, moving the client from issue identification to exploration to action in a complete conversational arc.

4.2.2 Issue Identification

The purpose of this LO is to help the learner understand techniques for coaching others as they identify the issues they want coaching on. This may involve sorting, prioritization, uncovering underlying issues, etc.

4.2.3 Issue Exploration

The purpose of this LO is to help the learner apply various techniques to help the coaching client explore the issue(s) they have raised. Techniques might include active listening, reflecting non-verbal communications, brainstorming, perspective shifting, values clarification, etc.

4.2.3 Action Commitment

The purpose of this LO is to help the learner understand techniques for helping the coaching client move into effective action after she/he has identified and explored the relevant issue, thereby helping the client take responsibility for their actions and their results.

4.3. Professional Coaching Skills Communication Skills for Coaches

4.3.1. Presence

Being fully present as a coach is key to successful coaching. Methods for presence include attentive or active listening, monitoring the three levels of listening, awareness of the environment, self-management, and consciously preparing for coaching.

The purpose of this LO is to teach the importance of presence and provide the learner with techniques and methods for achieving it.

4.3.2. Powerful questioning

Powerful questions are open ended, thought provoking questions that trigger curiosity and stimulate creativity and new insights. For example; rather than asking “Did that work?” regarding an action the client took, the coach may ask “What did you learn?”

The purpose of this LO is to familiarize the learner with the concept, examples and application of powerful questions.

4.3.3. Giving and receiving feedback

Being able to openly receive and provide effective feedback that builds people up instead of tearing them down is essential to helping individuals achieve their potential.

The purpose of this LO is to provide the learner with techniques for giving effective feedback to coachees and being open to receiving feedback from coachees and other coaches.

4.3.4 Basics of Using Emotional Intelligence

There is a vast body of research showing that emotional intelligence (EQ) is a better differentiator of top performance than cognitive intelligence (IQ). EQ can be developed and improved.

The purpose of this LO is to understand one of the models for Emotional Intelligence, ways Emotional Intelligence can be improved and the business case for improving or raising EQ.

4.4. Conducting the Coaching Conversation

4.4.1. Conducting the Coaching Conversation

This LO will allow an experience of using the concept of a coaching conversation in a realistic Agile setting.

The purpose of this application is to practice having a coaching conversation from beginning to end, including identifying the issue(s) for coaching, exploring the issue, and helping the client come to an action commitment.

5. Coach as Mentor: Techniques and mindsets for mentoring Agile roles, practices, and frameworks

5.1. Mentoring Agile Roles & Transitions

5.1.1 Mentoring and mentoring practices

A mentor facilitates personal and professional growth in an individual by sharing the knowledge and insights they have learned.

The purpose of this LO is to provide the learner with a model or explicit definition of mentoring (e.g., creating relationship, establishing goals, creating an action plan, giving feedback, etc.). In the Agile context, mentoring may be around the roles, transitioning to the Agile mindset, or when and how to incorporate practices at various organizational levels. There are models for how to create a good mentoring relationship, how to establish goals, helping the mentee create an action plan, etc. There is an inherent tension between giving direct advice as a mentor as opposed to helping the mentee explore options for themselves. Therefore, this LO contextualizes the mentoring role within the Agile context, and compares mentoring to coaching (defined elsewhere) and explores when to use which skill and mind-set.

5.1.2 Mentoring and coaching the roles in Agile

The Agile roles, whether on the core team or part of the stakeholder community, may require both coaching and mentoring because people’s roles often change upon adopting an Agile framework. Knowing when to coach and when to mentor is a key success criteria.

The purpose of this LO is to differentiate coaching and mentoring, help the learner decide when to use each and to articulate the purpose of assisting people in their new Agile roles through teaching, mentoring/coaching, supporting success and helping learn from failure to increase the learning. These roles may include product owner, testers, developers, analysts, managers, other Agile coaches and other stakeholders such as customer or executives.

5.1.3 Understanding the Individual Change Cycle

Whether they are just beginning in Agile, or as they develop into skilled practitioners, individuals on Agile teams are confronted with the need to learn new skills, develop new mindsets and engage in new relationships with their colleagues. In short, they are required to change.

The purpose of this LO is to expose the learner to one or more models for how individuals change, grow and learn. Such a model should distinguish between self-chosen change and organizationally imposed change. It should also emphasize the need to “meet a person where they are at” in their change process, rather than the coach imposing their beliefs or needs.

5.1.4 Mentoring and coaching the key transitions for the roles in Agile

Everyone goes through some kind of transition in their role when they encounter Agile and an Agile Coach helps them through that transition.

The purpose of this LO is to help the Agile coach understand the typical transitions faced by the people in various roles when Agile is brought in, such as analysts who will move out of the customer/team intermediary role, testers who need to become part of the action rather than ‘victims’ at the end of the cycle, product owners who need to focus on the “what” and “why” of the product rather than managing to a schedule, and Agile managers who need to become Agile enablers rather than problem solvers. This LO presents key transitions, such as these, and also offers critical success factors or key failure modes for each.

5.1.5 Identifying and handling resistance from individuals

Agile coaches use resistance rather than resisting resistance.

The purpose of this LO is to help the learner understand how to work with resistance from individuals as they take up their Agile roles, rather than seeing resistance as an indication of failure or something to be solved. In this LO, the learner is exposed to at least one model for working with resistance as information and as a resource for moving forward with greater depth and real buy-in from the people experiencing the resistance.

5.2. Problem scenarios - Mentoring vs. Coaching Agile Role Issues

The purpose of this LO is to practice mentoring and/or coaching a particular role in a particular circumstance. To practice opening the conversation and working

through the flow between mentoring and coaching, either by doing it and/or by talking through the thought process of how you would do it.

6. Coach as Teacher: Techniques and mindsets for teaching Agile roles, practices, and frameworks

6.1. Teaching the Agile Basics & Mindset Shift

6.1.1. Modes of teaching

Teaching the basics and mindsets of Agile is an activity the Agile Coach performs again and again and is conducted both in and out of the classroom.

The purpose of this LO is to offer techniques for teaching the basics and mindsets of the chosen Agile framework(s) in both formal training and on-the-fly training scenarios. On-the-fly training is the minimum needed for effectiveness, such as might be possessed by an Agile Team Facilitator. More formalized training becomes important as one’s sphere of influence increases, as it does for an Agile Coach.

6.1.2. How to help team members experience the Agile mindset shifts

Teaching is not education; education is not learning.

The purpose of this LO is to offer activities and techniques for creating experiences that allow team members to immerse themselves in what it’s like to work on an Agile team and what it’s like to take on the needed mindset shifts that enhance an Agile team’s success (i.e. self-organization, value-driven prioritization, collaboration, empiricism).

6.1.3. Be able to distinguish and articulate at least one Agile framework

Agile Coaches know one or more Agile frameworks ‘stone-cold’ and can fully articulate at least one clearly, simply and quickly.

The purpose of this LO is to help the learner become accomplished at articulating and teaching at least one Agile framework, including its associated roles, common practices, values and principles.

7. Teams: Startup, growth, conflict, health

Understanding how a team develops is crucial for starting up a new team, including how to work with the issues of team dynamics, team developmental stages, how development progresses and the choice to become a team in the first place.

7.1. Understanding Team Development

7.1.1. Understand a model of team development

Agile Coaches understand and use one or more models to illustrate how teams develop.

The purpose of this LO is to familiarize the learner with one or more models for how teams develop over time, including the attributes, stages and factors leading to increased cohesion, camaraderie and team performance.

7.1.2. Understand how to detect a team is at a certain stage of development

Agile Coaches detect the development level of their team and tailor their approach to be appropriate for that level, as well as for calling the team forth to the next level.

The purpose of this LO is to help the learner detect the team’s current developmental level and to use that information when designing and conducting the team start-up, or to recover from inaccurately detecting the team’s developmental level from an earlier point in time.

7.1.3. Understand how to help a team move up the development curve

Agile Coaches use their facilitation and coaching skills--in conjunction with one or more team development models--to help teams advance.

The purpose of this LO is to present key methods for helping a team advance through team developmental levels, both in setting the stage for doing so during the team start-up and ‘in-the-moment’ as the Coach works with the team over time.

7.1.4. Understand how to help a team choose to be a team

Agile makes teams more likely, but not inevitable. Groups need to choose to become a team and an Agile Coach helps them consciously choose to be so, or not.

The purpose of this LO is to reveal the true-ism that not every “team” is really a team. The essential ingredients to be a team are offered in this LO, as well as ways for the Agile Coach to help a group decide whether they can and want to be a team, and, if so, put the necessary building blocks in place during the team start-up. If not, this LO offers ways for the Agile Coach to recognize and work with a group, which may not be as effective as a team, but can still be successful.

7.2. Setting up the Team Environment

7.2.1. Helping Teams to Know Themselves

To perform, team members need to know one another’s backgrounds, talents, skills and have a sense of what they can count in one another.

The purpose of this LO is to teach the learner how to conduct several different activities that help team members to discover one another as individual human

beings, to include learning about one another’s professional backgrounds, values and goals.

7.2.2. Helping Teams Create their Culture & Vision

To perform, team members need to know who they are becoming as a team, specifically what culture they desire to create together and what their vision of being a team means to them.

The purpose of this LO is to teach the learner how to conduct several different activities that help team members create their team culture and team vision.

7.2.3. Creating Team Agreements & Ground rules

To perform, team members need a set of agreements that help them move toward their desired culture, vision and results.

The purpose of this LO is to teach the learner how to conduct several different activities that help team members create their team agreements and ground rules so that these can serve as an anchor point the team can use as they work together and move toward their desired state, or not.

7.2.4. Setting up their work environment

To perform, team members need a physical work environment that meets their needs and they need to create it themselves.

The purpose of this LO is to expose the learner to the importance of creating a physical work environment that supports the way the team desires to work. This LO details which elements to pay attention to (i.e. Physical arrangement of tables, monitors, private space, public space, task board, use of/display of electronic tools) and underscores how to help the team make decisions regarding these and make them happen.

7.2.5. Accommodating the team’s geographical relationship

To perform, team members need to make conscious decisions about how to accommodate the realities of their current geographic situation.

The purpose of this LO is to expose the learner to the importance of helping the team make decisions that help them accommodate their geographic reality, whether collocated, partially collocated/partially distributed, or fully distributed. If collocated, the coach can help the team leverage their ability to be in high-bandwidth, informal conversation with big visible charts and the like. If separated, the coach can help the team compensate for the lower-bandwidth communication through tools, over-communication methods, and the like. Regardless, the team’s agreements, culture, vision, etc. will be impacted by their current geographic reality and should be incorporated into the team’s start-up.

7.3. Creating a Team Kickoff/Startup Agenda

7.3.1. Creating a Team Kickoff/Startup Agenda

This LO will allow an experience of creating a team kickoff or start-up agenda in a realistic Agile setting.

The purpose of this LO is to apply the above components of a team startup to the real world scenario of starting up a team.

7.4. Characteristics of an Agile Team

7.4.1 Trusting

Trust is a key characteristic of a high performing team; the absence of trust can lead to relationship issues between team members and detract from the real work of the team.

The purpose of this LO is to provide the learner with techniques and tools for building trust in an Agile team and how to identify signs of mistrust. A trusting environment is one where team members can depend on one another to work together to accomplish the team’s purpose, are open and honest about their own strengths and weaknesses, willing to contribute value to decisions, and collaborate without fear of bullying, manipulation, backstabbing, or silent compliance.

7.4.2 Propelled by Shared Purpose

High-performing team members are committed to the team’s purpose and goals; they clearly understand their role on the team and believe that they can make a valuable contribution to the team.

The purpose of this LO is to enable the learner to identify signs of commitment in a team, learn techniques for developing a common purpose, roles and responsibilities, and how these things can help individuals develop a sense of team identity where they place team goals before personal goals and agendas.

7.4.3 Shared Leadership

Empowerment is the ability of the team members to make decisions in a disciplined manner as a problem arises. As a team matures, so will their ability to gather the appropriate information, include the right people and make decisions in a timely manner.

The purpose of this LO is to introduce the concept of empowerment and provide the learner with tools to help the team develop their ability to make collaborative decisions.

7.4.4 Continuously seeking to improve

Agile teams seek renewal and continuous improvement – constantly looking for ways to make minor adjustments in their work and velocity to achieve these moments more frequently.

The purpose of this LO is to bring awareness to the journey of high performance and the importance of continuous improvement for an Agile team.

7.4.5 Self-Organizing

Self-organizing teams negotiate their deadlines, allow roles to emerge as the team works together, and define their own norms.

The purpose of this LO is to understand the key beliefs to becoming a self-organizing Agile team and to provide the learner with techniques and/or models to facilitate the team developing in this way.

7.5. Coaching the Journey toward High Performance

7.5.1 Defining and identifying high performance

High performance is a journey, not a destination. Many teams will strive for high performance and never reach it, others will experience it for a moment in time and it will be gone. High performance is a journey, not a destination. Many teams will strive for high performance and never reach it, others will experience it for a moment in time and it will be gone and then recaptured.

The purpose of this LO is to provide the learner with the ability to identify characteristics of a high performing team and to help the team assess their performance and identify areas for improvement. An Agile team is a high performing team when they are aligned toward a common goal, roles and responsibilities are clearly understood by all, they have a high level of collaboration and trust, they demonstrate effective ways of resolving conflict, and there is a strong sense of individual and shared accountability to achieve the teams goals.

7.5.2. Team vs. Group

Not every group needs to become a team or stay a team. The Coach works with the team to identify when a team is needed.

The purpose of this LO is to understand the differences between a group and a high-performing team and help the learner identify when each is appropriate.

7.5.3 Team development is a journey, not a destination

Teams will move in and out of different levels of team functioning on their journey to being a high performing team.

The purpose of this LO is to provide the learner with a context for understanding that teams go through cycles--moving from highly collaborative and productive to less productive and less collaborative--in addition to their developmental

stages (referenced in 5.1.1). This is a natural process and needs to be reflected back to the team, not seen as a failure.

7.5.4 Assessing the team as a healthy system

Teams may move into a pattern of unhealthy functioning, toxic communications, and/or severe underachievement.

The purpose of this LO is to provide the learner with a one or more models for assessing healthy team functioning, especially the ability to identify clearly dysfunctional teams. It also provides suggestions for dealing with common dysfunctional patterns.

7.5.5 Strategies for dealing with different types of teams

Different types of teams will require different strategies and techniques by the coach.

The purpose of this LO is to understand the different types of teams (e.g. Co-located /Virtual; Ongoing / Temporary; Single Organization / Cross-Organization; Same Culture / Culturally Diverse) and provide the learner with ways to tailor their interactions with the team based on the type of team they are coaching.

7.5.6 The coach’s role in a self-organizing team

Agile Coaches operate on the belief that the team has the answers to solve their problems and act in the role of facilitator, mentor and teacher to guide the team in discovering their solution.

The purpose of this LO is to provide the learner with techniques for fostering a self-organizing team including; facilitative leadership, defining team norms, facilitating the appropriate type of decision making, and allowing leadership and roles to emerge. This requires the skill set to change from teaching to facilitating to mentoring to coaching at varying times.

7.6. Handling Conflict and Dysfunction within the Team

7.6.1 Identifying and Managing ‘Group Think’

Group think is when groups make decisions without critical evaluation of alternative ideas or viewpoints. Group members move toward decisions prematurely in order to minimize conflict due to multiple factors such as; group pressure, lack of trust, fatigue, apathy, lack of involvement, etc.

The purpose of this LO is to help learners identify when group think happens and how to prevent, or manage it when already present.

7.6.2. Identifying and surfacing conflict

Conflict is a natural part of a team’s development and learning process and is essential to their creativity and quality of work. Fear of interpersonal conflict can be an impediment to building a high performing team.

The purpose of this LO is to understand the importance of conflict in a team, become familiar with a model for identifying levels of conflict in a group and provide the learner with the ability to surface conflict in a positive manner to improve team’s performance and best possible solutions to challenges. When conflict navigation skills exist, team members feel more confident in their abilities to address conflict and hold one another accountable for their behavior and performance.

7.6.3 Building self-awareness/self-management capacity in the team

The same issues of self-awareness and self-management apply to the team as well as the Agile coach.

The purpose of this LO is to give the learner tools to use with their teams to increase the team’s capacity for both self-awareness and self-management. Lack of self-management within the team can lead to unproductive conflicts. Lack of self-awareness can lead to a team member not even knowing when they are being domineering or non-collaborative.

7.7. Handling Organizational Impediments

7.7.1. Identifying and Capturing Impediments

The decision to adopt Agile at a team or organizational level will introduce varying types of change into the organization.

The purpose of this LO is to become familiar with common organizational impediments and to help the learner be able to help teams recognize and capture the impediments affecting them. Agile practices do not necessarily create new problems but they have a way of surfacing dysfunctions that already exist within an organization. Organization impediments that impact the team may be such things as organizational structure; physical office layout, hiring practices, career paths, training and development, compensation, rewards and recognition, leadership, etc. At this level, the purpose is not to solve these organizational challenges, but to mitigate their impact on a specific team.

7.7.2. Leadership Engagement

Organizational impediments limit team productivity and quality. Some impediments can be resolved by the team, others may need to be solved at higher levels in the organization.

The purpose of this LO is to provide the learner with the ability to know when and how to engage leadership in solving organizational impediments.



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7.8. Plan to facilitate a conflict in a team

7.8.1 Plan to facilitate a conflict in a team

The purpose of this LO is to plan how to work through a conflict among members and practice techniques for observing the behavior, deciding if and how to intervene, surfacing the conflict, either by doing it and/or by talking through the thought process of how you would do it.



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Guidance for Course Designers

Curriculum guidance

This document is not a description of a course – it is a description of what a learner should encounter in courses, or study to learn, to gain a sound introduction to this track discipline. In each section, watch for concept elements in which a concept is introduced, and technique & application elements in which the learner studies a technique or practice, or reinforces a concept.

We encourage instructors to take time both during class and between classes to cover the material, to let the learner embed the learning and gain experience applying the concepts. We find that embedding time is essential to instilling concepts and skills. Acceptable course design should be heavily weighted toward application of the skills taught.

The Learning Objectives (LOs) are intended to support any of the Agile methodology variants and apply to individuals and teams with varying skills and backgrounds.

Instructors are expected to include group activities of their own design and to incorporate their own, personal, specialties that highlight particular aspects of this track discipline’s concepts, mindset, models and techniques.

Durations are meant to convey a general sense of how deeply one should go to adequately convey the information. They are not meant to be followed verbatim. However, cutting times dramatically can result in a course not passing the accreditation evaluation because the course will probably not cover the LOs adequately.

Acceptance criteria

To be acceptable, material covering all learning objectives is expected to be detailed, with a focus on active learning opportunities, such as exercises, games, discussion, and hands-on experience. While lectures, handouts and presentation materials are often necessary aspects of a learning session, we recognize that education is more impactful and long-lasting when a student is actively engaged in the learning process.

Track Structure

Track components

- Track: Information an individual is expected to know in order to be called an Expert in a specific discipline
- Subject: A collection of related Themes within a Track
- Theme: A collection of strongly related Learning Objectives
- Learning Objective: Finest-grain units of learning within a Track
- Certification: Acknowledgement of learning acquired by a class attendee
- Gate: Point at which a learner’s study, experience and competency are evaluated for Expert standing

Track component relationships

Track

1. Subject

1.1 Theme

1.1.1 Learning Objective

Gate

1. Earn credit for all Themes in Track

2. Gain experience

3. Evaluation (knowledge or competency)





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Roadmap

The ICAgile Roadmap

Working with experts from around the world, the International Consortium for Agile is creating an education roadmap for all specialties involved in the Agile community. Recognizing that education is a life-long endeavor and that people need recognition as they proceed along the way, ICAgile has broken the journey into meaningful certifications with graduated expectations.

ICAgile has also assembled a Roadmap Integration Team. Our Roadmap Integration Team has the responsibility of identifying the flow and interaction of the tracks within the ICAgile Learning Roadmap.

The integration team offers guidance to track development teams on positioning tracks within the Roadmap, using shared Themes and presenting Learning Objectives from the perspective of various disciplines. The integration team also helps track chairs develop specific tracks’ Agile philosophy and perspective, and recommends the development of additional tracks in the Roadmap.

ICAgile Study Tracks

Tracks currently include Executive Leadership, Agile Testing, Agile Project Leadership, Agile Software Design & Development, Value Management & Business Analysis, Agile Facilitation and Coaching, and Agile Enterprise Coaching.

Executive Leadership

The Executive Leadership learning track is geared towards the executive and senior leadership levels within an organization.

Value Management Business Analysis

The Value Management Business Analysis learning track is designed to address the linkage between a coherent vision and strategy and how the strategic goals are achieved through definition and execution of all required programs/portfolios and projects.

Agile Project Management

The Agile Project Management learning track is designed to introduce learners to Agile Project Management during the first section of the track. Agile program & portfolio subjects are covered in the second section of the track.

Agile Software Design & Development

The Agile Software Design & Development learning track is designed to help people learn the skills, techniques and mindset needed to effectively design and develop software applications and systems with



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the known techniques, tools and mindset of good Agile programmers, as many Agile projects will involve some software design and programming.

Agile Testing

The Agile Testing track is designed to give the learner both the vocabulary and principles to be able to effectively perform Agile Testing as part of a whole-team concept – from initial test planning, through development iterations, to product release. Agile Testing is a key aspect of any Agile Project and may also be a specific role within any Agile Team.

Agile Team Facilitation and Coaching

The Agile Team Coaching and Facilitation learning track is designed to introduce learners to the concept of facilitating and coaching in the Agile context. It covers the roles and skills needed by an Agile Team Facilitator and an Agile Coach, to appropriately lead and effectively facilitate, coach, mentor and teach Agile teams.

Agile Enterprise Coaching

The Agile Enterprise Coaching learning track is designed to introduce learners to the concept of coaching an Agile transformation at the Enterprise level.