



## Intersection of Agile and Change Management: Agenda

### Foundation

of Agile and Change Management

### The Research

IN Agile / TO Agile

### Prosci Integration

Approach + Agile

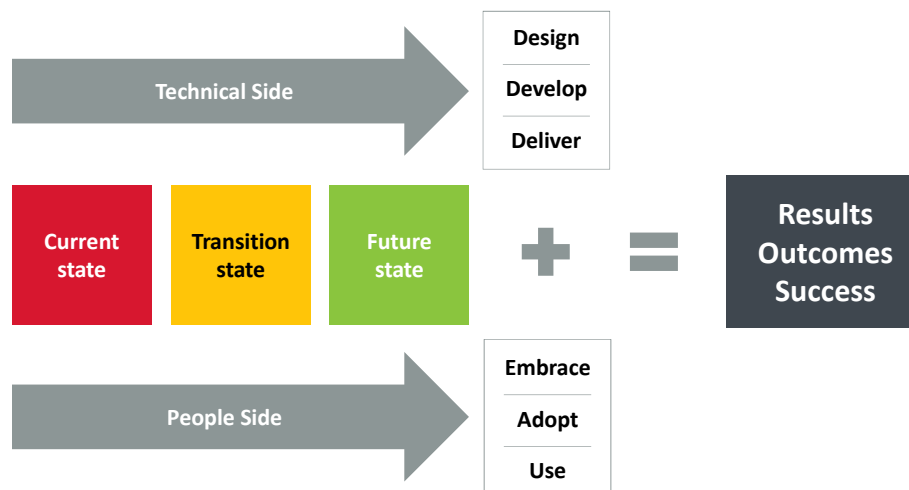
ADKAR + Agile

5 Levers + Agile

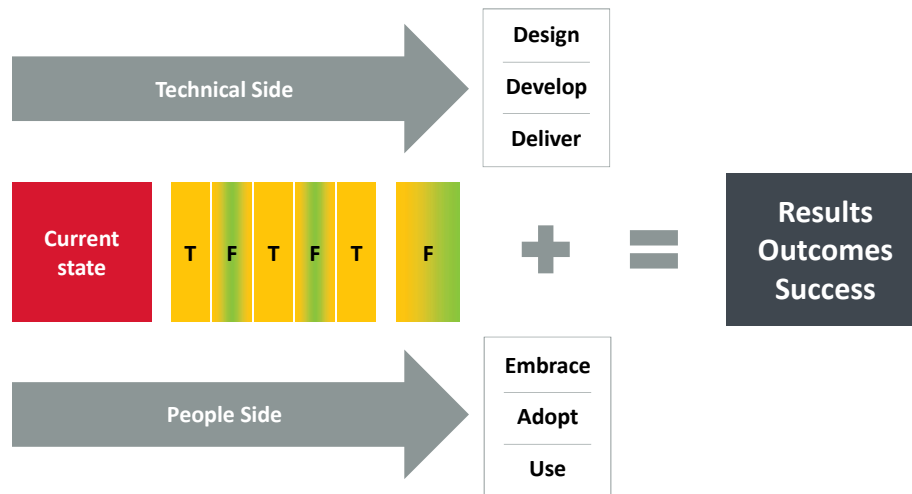
Roles + Agile

# A CHANGE MANAGEMENT I L E *Foundation*

## Unified Value Proposition



## Unified Value Proposition + Agile



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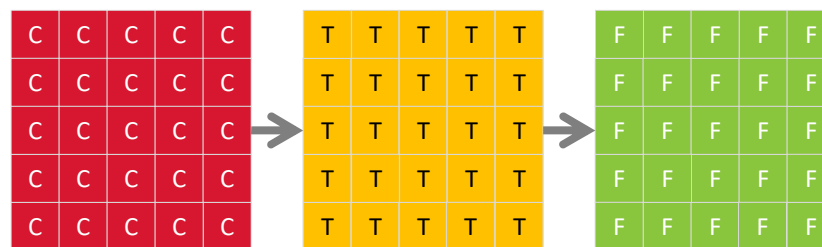
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## Organizational change



## Made up of individual changes

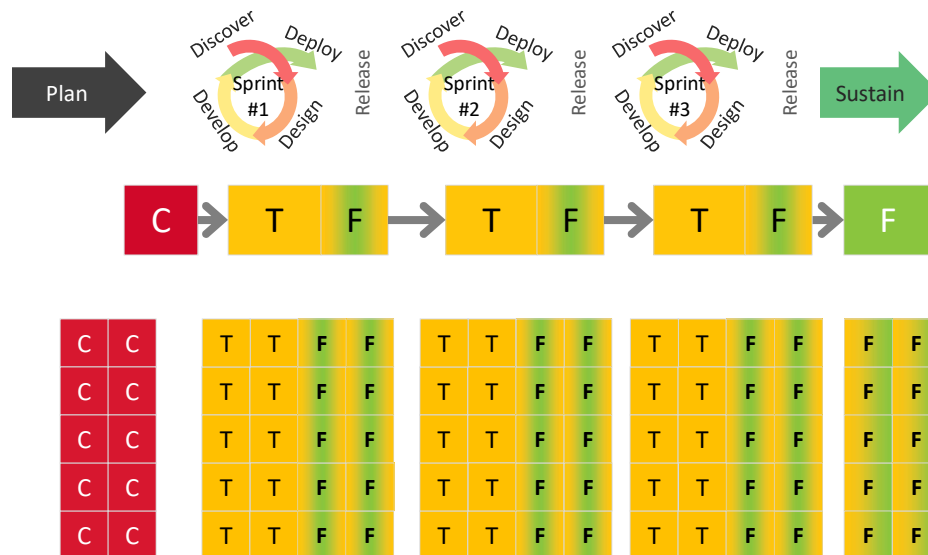


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## Individual Change + Agile



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## Essence of the Change Management



The achievements  
of an organization  
are the results of the  
combined effort of  
each individual.

Vince Lombardi

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## Origins of the Agile Manifesto

February 2001  
Snowbird, Utah



“ We are uncovering better ways of developing software by doing it and helping others do it.

### The Agile Alliance

Kent Beck	Ron Jeffries
Mike Beedle	Jon Kern
Arie van Bennekum	Brian Marick
Alistair Cockburn	Robert C. Martin
Ward Cunningham	Steve Mellor
Martin Fowler	Ken Schwaber
James Grenning	Jeff Sutherland
Jim Highsmith	Dave Thomas
Andrew Hunt	

Source: Agile Manifesto, [agilemanifesto.org](http://agilemanifesto.org)

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## The Four Values of The Agile Manifesto

Agile Value	Parallel CM Value
1 Individuals and Interactions Over Processes and Tools	<i>Organizations don't change, individuals do</i>
2 Working Software Over Comprehensive Documentation	<i>Without adoption and usage we end up getting "solutions without results"</i>
3 Customer Collaboration Over Contract Negotiation	<i>Individual change impacts are what need to be defined and can be managed</i>
4 Responding to Change Over Following a Plan	<i>Enabling successful individual change is the key to delivering organizational outcomes</i>

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## The Twelve Principles of Agile Development

1	Customer satisfaction through early and continuous software delivery	<i>Adoption and usage at the table from the beginning and throughout</i>
2	Accommodate changing requirements throughout the development process	<i>Individual change journeys through ADKAR set the pace</i>
3	Frequent delivery of working software	<i>Frequently supporting individuals through ADKAR</i>
4	Collaboration between the business stakeholders and developers throughout the project	<i>Encouraging employee engagement and participation</i>
5	Support, trust, and motivate the people involved	<i>Yup!</i>
6	Enable face-to-face interactions	<i>Communications, coaching, and sponsorship include face-to-face interactions</i>

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## The Twelve Principles of Agile Development

7	Working software is the primary measure of progress	<i>Adoption and usage is the primary measure of CM progress</i>
8	Agile processes to support a consistent development pace	
9	Attention to technical detail and design enhances agility	<i>Attention to answering peoples questions and need enhances adoption and usage</i>
10	Simplicity	<i>ADKAR...</i>
11	Self-organizing teams encourage great architectures, requirements, and designs	
12	Regular reflections on how to become more effective	<i>Regular ADKAR pulse checks, PCT and BP Audit to improve effectiveness</i>

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# A CHANGE MANAGEMENT I L E

## *The Research*

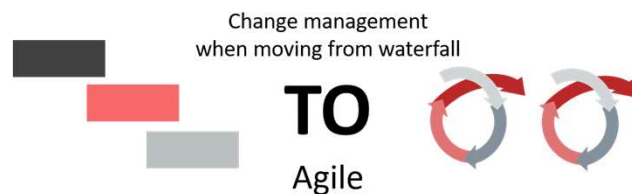
### Purpose and Participant Profile

“ The objective of this study is to uncover and identify challenges, lessons learned, tips and suggestions for practitioners working to bring iterative development into their organization and to support employee adoption and usage of initiatives using iterative development Agile techniques.

#### PART 1



#### PART 2



# Integrating Agile and Change Management

## Prosci Webinar – [www.prosci.com/webinars](http://www.prosci.com/webinars)



### CHANGE MANAGEMENT AND AGILE

The intersection of the people side of change and Agile development processes

Change Management and Agile 5

#### CHANGE MANAGEMENT -IN- AGILE



In response to the increasing prevalence of Agile development approaches, and the need to drive adoption and usage of the solutions created using these approaches, Prosci conducted a study to explore two dimensions of change management related to Agile development.

The first section of the study focused on uncovering the adaptations and challenges when applying change management to drive adoption and usage in a project using Agile development processes. While certain aspects of Agile address the people side of change by engaging end users in the process, the study aimed to dive deeper into key practice areas of the discipline of change management and how they are applied most effectively in an Agile process.

The second section of the study explored the people side of the systemic, organizational shift from a traditional waterfall project approach to an Agile approach. Whenever an organization implements a new approach to change (examples include quality systems, continuous improvement, and even project management methodology), the introduction of the new approach is itself a change. Introducing Agile development processes is no different.

#### CHANGE MANAGEMENT WHEN MOVING FROM WATERFALL -TO- AGILE



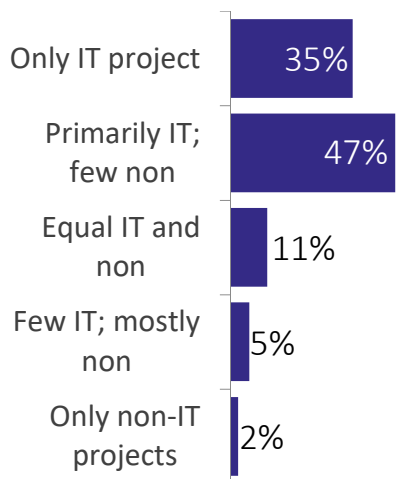
For an organization to be successful in its projects using Agile development, employees must effectively adopt and use the Agile approach itself, along with embracing new mindsets and cultural values.

A central theme emerged throughout the research that connected the two parts of the study. There was a correlation between how well Agile was initially introduced and deployed into the organization and the success rates of projects using Agile approaches. Said another way, when the people side of change to Agile was effectively managed, there were fewer obstacles and greater success managing the people side of change in Agile initiatives. When the move to Agile was managed poorly, there was a greater level of resistance to Agile overall and thus more obstacles encountered when attempting to integrate change management in Agile projects.

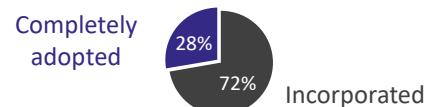
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## Purpose and Participant Profile

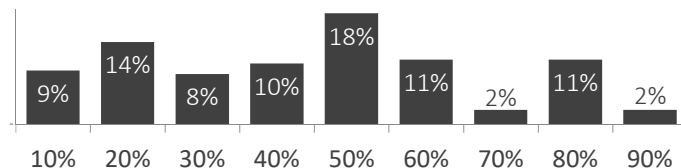
### Types of projects using Agile development process



### Completely adopt the Agile methodology or incorporate some aspects of Agile into your current waterfall approach?










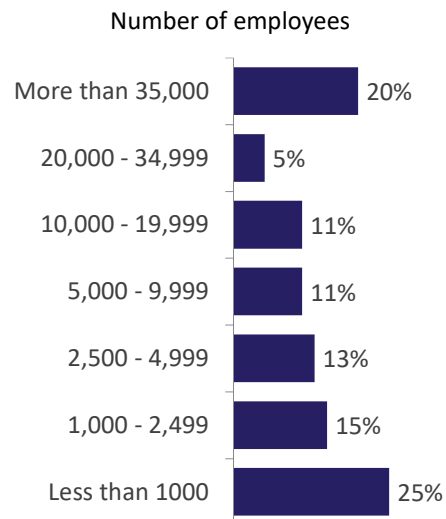
### For those who incorporated, about what percent of your current approach incorporates an Agile methodology:





## Purpose and Participant Profile

Banking		14%
Consulting		11%
Information Services		8%
Government – Federal		6%
Insurance		6%
Finance		6%
Health Care		6%



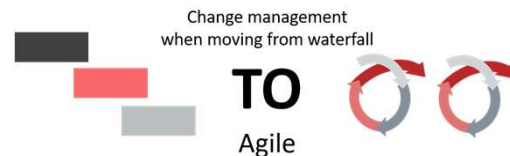
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- ☐ Impact
- ☐ Contributors
- ☐ Obstacles
- ☐ Adaptations
- ☐ Do Differently
- ☐ Practice Areas \* 10
  - ☐ Adaptations
  - ☐ Challenges
  - ☐ Do Differently



- ☐ Motivation
- ☐ Structure
- ☐ Contributors
- ☐ Obstacles
- ☐ Engagement
- ☐ Resistance
- ☐ Duration
- ☐ Sustainment

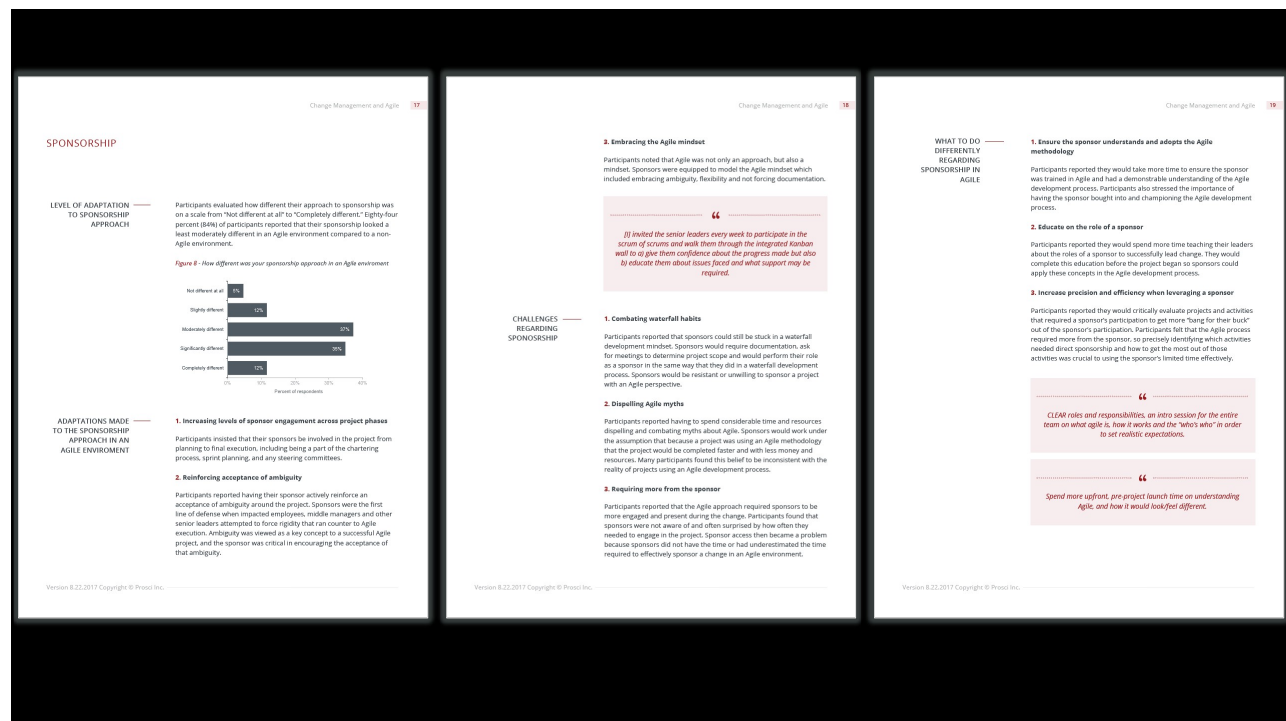
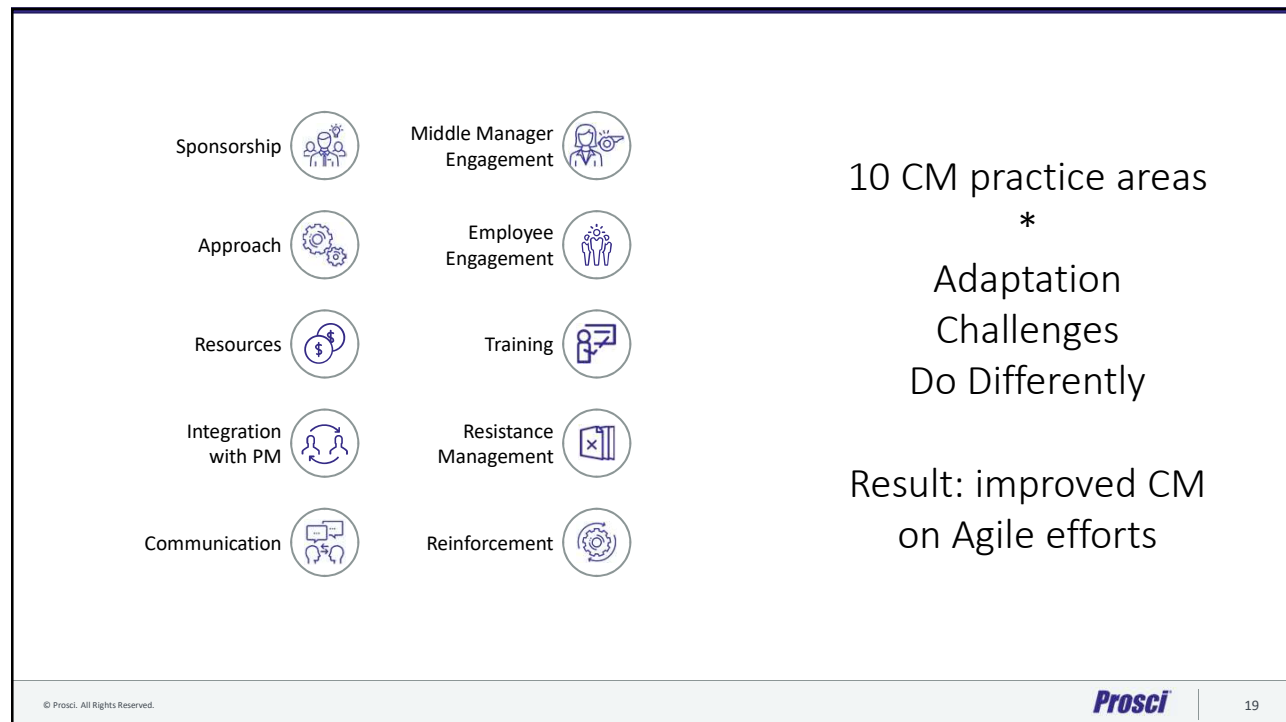
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# Integrating Agile and Change Management

## Prosci Webinar – [www.prosci.com/webinars](http://www.prosci.com/webinars)



# A CHANGE MANAGEMENT I L E *Integration*

Integration: Agile and Change Management

Approach  
ADKAR  
5 Levers of CM  
Roles in CM

# Approach *in Agile*

## Impact of Agile development's iterative nature on CM

“ Flexibility is key and not panicking with the uncertain nature of Agile delivery. Keep the basics but be prepared to negotiate on other aspects of the traditional change approach. Know that every day is different, and that's okay.

- 
1. CM became iterative
  2. CM plans became living documents
  3. CM required more upfront work
  4. CM needed to be done in less time and at a faster pace

# Integrating Agile and Change Management

## Prosci Webinar – [www.prosci.com/webinars](http://www.prosci.com/webinars)

Change Management and Agile

### DRIVING SUCCESSFUL CHANGE IN AN AGILE ENVIRONMENT

IMPACT OF AGILE DEVELOPMENTS  
ITERATIVE NATURE ON  
CHANGE MANAGEMENT

“  
The change management approach is more iterative in nature and aligned to sprints and releases. The pace of change management is also different - e.g. we concurrently work on embedding change from one release while doing impact assessments and design for the next release.  
”

“  
Flexibility is key and not panicking with the uncertain nature of Agile delivery. Keep the basics but be prepared to negotiate on other aspects of the traditional change approach. Know that every day is different, and that's okay.  
”

**1. Change management became iterative**  
Participants reported that their change management approach became iterative to match the Agile process. For some participants, this iterative nature was seen in constantly evolving change management activities. For others, the higher-level change management concepts, such as key success factors and the definition of adoption and usage, were constantly reevaluated and redesigned to keep up with the evolution of the Agile development.

**2. Change management plans became living documents**  
Participants reported that the iterative nature of Agile required them to abandon the notion of perfect or “beautiful” change management plans and analysis. Participants reported having to plan change management activities with a “just-in-time” mentality. Change management plans were constantly adjusted in small ways to ensure that they were serving the needs of the Agile project.

**3. Change management required more upfront work**  
Participants reported that more upfront work was required for them to successfully manage the change associated with an Agile effort. Agile projects required more upfront communication, stakeholder engagement and information distribution, extending the pre-project activities that the practitioners undertook for their changes. This extended upfront work did not appear to diminish any work later in the project, but for the project to be successful, participants spent more time preparing so they could quickly respond in the Agile environment.

**4. Change management needed to be done in less time and at a faster pace**  
Participants reported that the iterative nature of Agile projects left them with less time to complete necessary change management planning, analysis and activities. At times, this was because of having too many changes to manage due to the sprint development process inherent in

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Greatest contributors to success

“ If you plan short 4-8 week sprints, every little achievement can be a success story, however small (even a 2 person change which has a measurable business impact to a business process). Small = greater commitment for all.

1. Early engagement of change manager
2. Consistent communication
3. Senior leader engagement
4. Early wins

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### Consistent obstacles

“ [The greatest challenge is] the tendency to be less strategic about the people approach to adoption. The focus on the "story" tends to overshadow planning for operationalizing the product (e.g., adjust business processes, weave into training/user documentation, etc.)

1. Lack of understanding of and appreciation for CM
2. Organizational resistance to Agile
3. High volume of incremental change
4. Increased pace
5. Middle manager resistance

#### CONSISTENT OBSTACLES TO SUCCESS WHEN APPLYING CHANGE MANAGEMENT IN AN AGILE ENVIRONMENT

“ [The greatest challenge is] when projects haven't clearly defined what the Agile methodology means for the project. I find that many projects talk about and aspire to be "agile" but leaders don't articulate what that means in terms of scoping and planning work, resource needs, and project structure. This makes it difficult for the change management work stream to plug in and integrate with the rest of the team, and therefore, sufficiently understand how the to-be state will be designed, assess impacts against that, etc.

“ [The greatest challenge is] the tendency to be less strategic about the people approach to adoption. The focus on the "story" tends to overshadow planning for operationalizing the product (e.g., adjust business processes, weave into training/user documentation, etc.)

#### 1. Lack of understanding of and appreciation for change management

The number one obstacle reported was Agile developers not understanding or appreciating change management. Developers were completely focused on the technical aspects of the Agile project and often viewed change management as an unnecessary burden. The Agile approach was rigid and left little room for adaptation, so there was often no place for change management in projects. Developers did not understand why, how and when change management could integrate with their Agile project.

#### 2. Organizational resistance to Agile

In addition to managing the resistance brought on by a specific change, impacted groups were resistant to the general Agile approach. Impacted groups did not see the benefits of Agile, or did not understand the process enough to understand its benefits, and would disengage from the Agile project.

#### 3. High volume of incremental change

The high volume of small, incremental changes in each sprint made it difficult for change managers to create a compelling case for each change with end users. Change managers were not able to highlight the "what's-in-it-for-me" (WIIFM) for each small change, because, by themselves, each small change did not have a WIIFM. Change managers found that by grouping small changes together, a compelling WIIFM could be stated. Change managers would delay or recommend that the small change outputs of each sprint be delayed for this reason. This delay caused conflict with Agile developers who viewed the immediate release of changes as a primary value of Agile development.

#### 4. Increased pace

The Agile development process occurred at a faster pace than waterfall projects, making participants feel hard-pressed to deploy change management plans in the short sprints. Developers would move on with sprints as technical requirements were satisfied, often leaving the change manager behind.

#### 5. Middle manager resistance

Resistance from middle managers included general resistance to the changes being initiated by projects and resistance to the Agile approach. Middle managers were "gate keepers" of their employees and groups of employees would often emulate the resistance of their manager.

## Largest adaptations to accommodate Agile

“ I have designed an Agile communication cycle that was based on the events within the product iteration cycle (6 weeks). Managed expectations of the user community that we do not have all the details they are asking for - due to the fact that unlike in a classical waterfall project we did not have all requirements defined/approved in the beginning. Otherwise I was trying to keep all the elements of a change approach covered - e.g. change sponsorship/leadership, change impact assessment, stakeholder assessment and management aligned with communication planning, just in time and 'bite size' training.

1. Focus on iterative change management
2. Redefine success measures
3. Test new approaches

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## What to do differently


“ [I would] partner with [the] ScrumMaster and Product owner [to] ensure they are clear what it means the effectively gain acceptance and adoption and set clear expectations with them on what they must do to ensure we're all successful.

1. Educate the organization on Agile
2. Engage sponsors more effectively
3. Engage the project team earlier and more frequently




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## CM Approach




 <b>Challenges</b>	 <b>Adaptations</b>	 <b>Do Differently</b>
<ol style="list-style-type: none"> <li>1. The Agile process was incompatible with structured approaches</li> <li>2. Required change managers to work faster</li> <li>3. Left little additional time to deploy change management</li> </ol>	<ol style="list-style-type: none"> <li>1. Aligned with functionality deliverable date</li> <li>2. Varied based on sprints</li> <li>3. Reevaluated constantly</li> </ol>	<ol style="list-style-type: none"> <li>1. Increase Agile training</li> <li>2. Begin earlier</li> <li>3. Spend less time focusing on small details</li> <li>4. Be more selective in what change management activities were employed</li> </ol>

*“ Less details in the structure at first. Create the high level structure and save the details to be filled in as you execute and learn from experiences.”*


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## Integrating CM and PM

 <b>Challenges</b>	 <b>Adaptations</b>	 <b>Do Differently</b>
<ol style="list-style-type: none"> <li>1. Project team absent from Agile projects</li> <li>2. Project team did not see the value of change management</li> <li>3. Workload increased on Agile projects</li> </ol>	<ol style="list-style-type: none"> <li>1. Increasing communication between change management and project management teams</li> <li>2. Collaborating more with project management team</li> <li>3. Increasing autonomy with individual people</li> </ol>	<ol style="list-style-type: none"> <li>1. Integrate earlier</li> <li>2. Provide change management training</li> </ol>

*“ You have to align to their cadence and ways of working to get what you need as OCM inputs. Help them understand your ways of working also. Explain its a two-way street and in the best interests of both parties.”*

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# ADKAR *in Agile*

## Prosci® ADKAR® Model Foundation



ADKAR element:	Definition
<b>A</b> Awareness	Of the need for change
<b>D</b> Desire	To participate and support the change
<b>K</b> Knowledge	On how to change
<b>A</b> Ability	To implement required skills and behaviors
<b>R</b> Reinforcement	To sustain the change



Awareness	→	Why? Why now? What if we don't?
Desire	→	WIIFM Personal motivators Organizational motivators
Knowledge	→	Within context (after A&D) Need to know <i>during</i> Need to know <i>after</i>
Ability	→	Size of the K-A Gaps Barriers/Capacity Practice/Coaching
Reinforcement	→	Mechanisms Measurements Sustainment

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## Prosci® ADKAR® Model Foundation



When you create:	You hear:
<b>A</b> Awareness	"I understand why..."
<b>D</b> Desire	"I have decided to..."
<b>K</b> Knowledge	"I know how to..."
<b>A</b> Ability	"I am able to..."
<b>R</b> Reinforcement	"I will continue to..."

## ADKAR + Agile

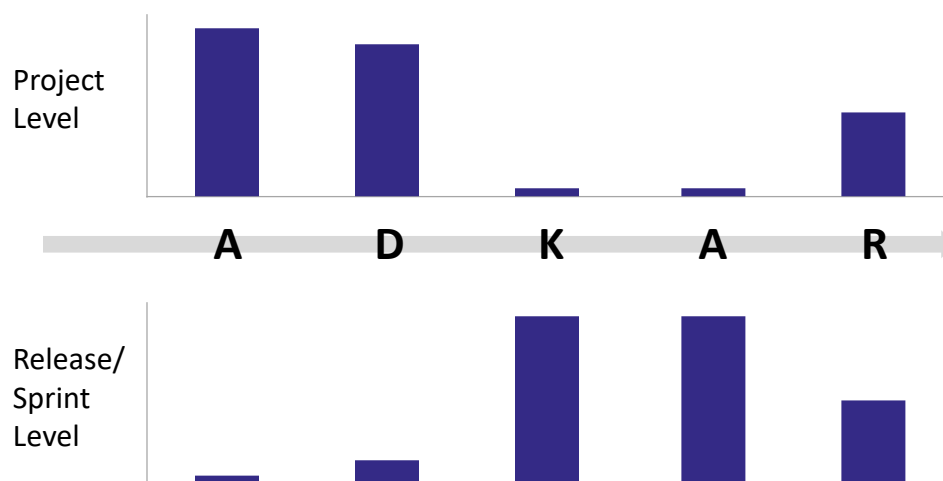
How does ADKAR support individual transitions in an incremental change environment / Agile?

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## ADKAR – Project/Sprint Split

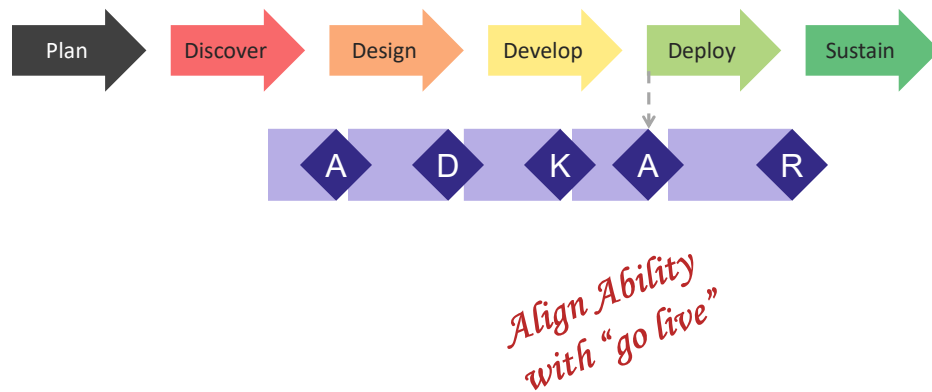


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## ADKAR Milestones in Waterfall

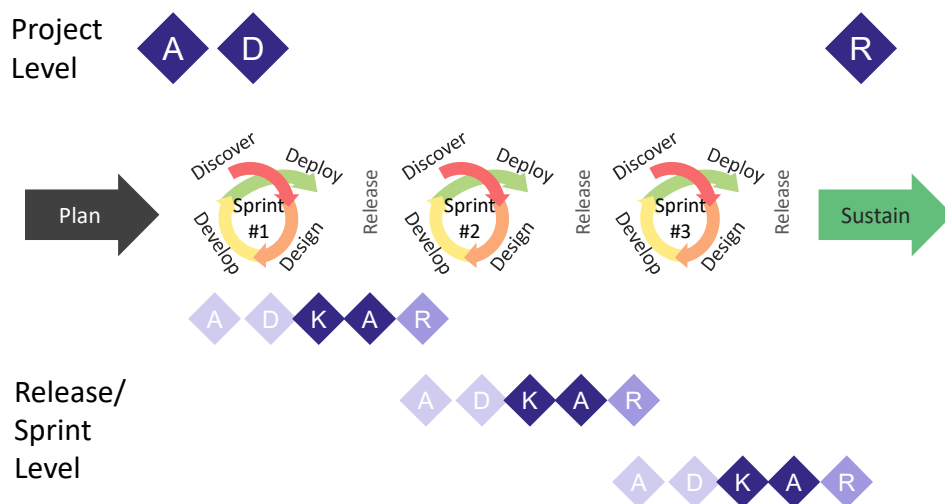


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## ADKAR Milestones in Agile



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## Three levels of ADKAR






Awareness	I understand why for this release	I understand why for this project	I understand why for Agile as an approach
Desire	I have decided to participate in this release	I have decided to participate in this project	I have decided to participate in Agile as an approach
Knowledge	I know how to do what's needed for this release	I know how to do what's needed for this project	I know how to do what's needed for Agile as an approach
Ability	I am able to do what's needed for this release	I am able to do what's needed for this project	I am able to do what's needed for Agile as an approach
Reinforcement	I will continue to do what's need for this release	I will continue to do what's need for this project	I will continue to do what's need for Agile as an approach

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## 5 Levers of CM *in Agile*

## 5 Levers of CM Foundation






	<b>Sponsor Roadmap</b>	Outlines the actions required by senior leaders to fulfill their ABC roles and responsibilities
	<b>Communication Plan</b>	Right message; Right audience; Right time Right sender; Right channel
	<b>Coaching Plan</b>	Outlines middle manager engagement with direct reports to fulfill their CLARC role
	<b>Training Plan</b>	Build skills required during the change, after the change, in order to change
	<b>Resistance Management Plan</b>	Preventative, Proactive, Reactive approaches to mitigate resistance impact

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## 5 Levers of CM Foundation

	<b>A</b>	<b>D</b>	<b>K</b>	<b>A</b>	<b>R</b>
	●	●			●
	●				●
	●	●	●	●	●
			●	●	
		●			●

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## 5 Levers of CM + Agile

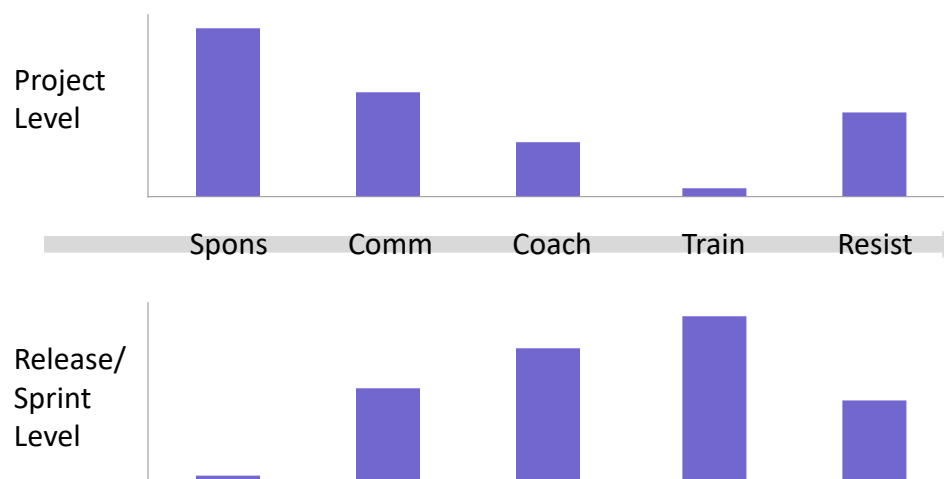
How are the five levers of change management leveraged in an Agile project?

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## 5 Levers of CM – Agile Project/Sprint Split

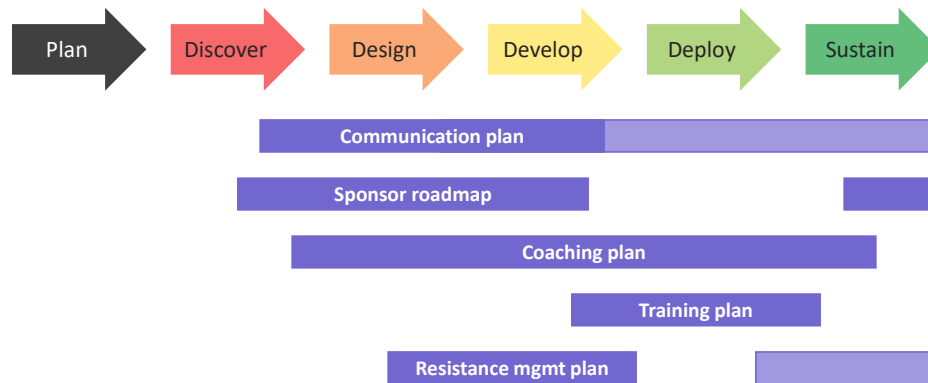


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## 5 Levers of CM in Waterfall



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## 5 Levers of CM in Agile



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## Sponsorship



### Challenges

1. Combating waterfall habits
2. Dispelling Agile myths
3. Requiring more from the sponsor



### Adaptations

1. Increasing levels of sponsor engagement across project phases
2. Reinforcing acceptance of ambiguity
3. Embracing the Agile mindset



### Do Differently

1. Ensure the sponsor understands and adopts the Agile methodology
2. Educate on the role of a sponsor
3. Increase precision and efficiency when leveraging a sponsor

*“ [I] invited the senior leaders every week to... a) give them confidence about the progress made but also b) educate them about issues faced and what support may be required.”*

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## Communication



### Challenges

1. Communication overload
2. Aligning communications with Agile process
3. Managing expectations of the Agile process



### Adaptations

1. Communicating more frequently
2. Communicating more precisely
3. Communicating in support of the Agile process



### Do Differently

1. Maintain engagement
2. Align communications with Agile
3. Utilize leadership when communicating

*“ Change management needs to ensure project teams who are communicating openly are competent in doing this. Agile approaches warrant significantly more time spent on coaching project teams and leaders in the basics of effective communication and change management.”*

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### Coaching



#### Challenges

1. Managers had many constraints on their time
2. Managers had high everyday workload
3. Managers lacked training in Agile



#### Adaptations

1. Communicating more individually with managers
2. Providing resources to managers
3. Understanding that engaging managers in Agile is much harder



#### Do Differently

1. Train managers in Agile
2. Communicate with managers more frequently
3. Address project-specific concerns and challenges

*“Create a separate weekly scrum type meeting just for managers and supervisors that unpacks on a weekly basis what they need to do for a) development and b) adoption & usage.”*

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### Training



#### Challenges

1. Timing of releases required a fast turnaround from one training to another
2. Timing of trainings left little time for development
3. Training required a near constant stream of updates and modifications before they were launched



#### Adaptations

1. Training was more focused and concise
2. Training frequency increased
3. Training on the Agile process was incorporated
4. Training just in time



#### Do Differently

1. Focus on just-in-time training
2. Evaluate training needs more often and more effectively
3. Begin the training process earlier

*“Had to split up the training into parts that fitted with the product releases... Very close follow up of the users after training. Evaluating the training after each time we did it and adjusted.”*

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## Resistance Management



### Challenges

1. Prominence of traditional people-side challenges
2. Lack of sufficient time to manage resistance
3. Tensions between Agile and waterfall



### Adaptations

1. Communicating more frequently to dispel myths
2. Focusing on key resistors
3. Failing quickly to learn quicker



### Do Differently

1. Communicate more on why the change was necessary
2. Create a formal resistance management plan
3. Build knowledge of the change and the Agile process

*“As our projects are delivered in Releases, we actually have the opportunity to address ‘resistance’ for a much longer period of time. We work on increasing adoption and reducing resistance for one Release concurrently with planning the next release.”*

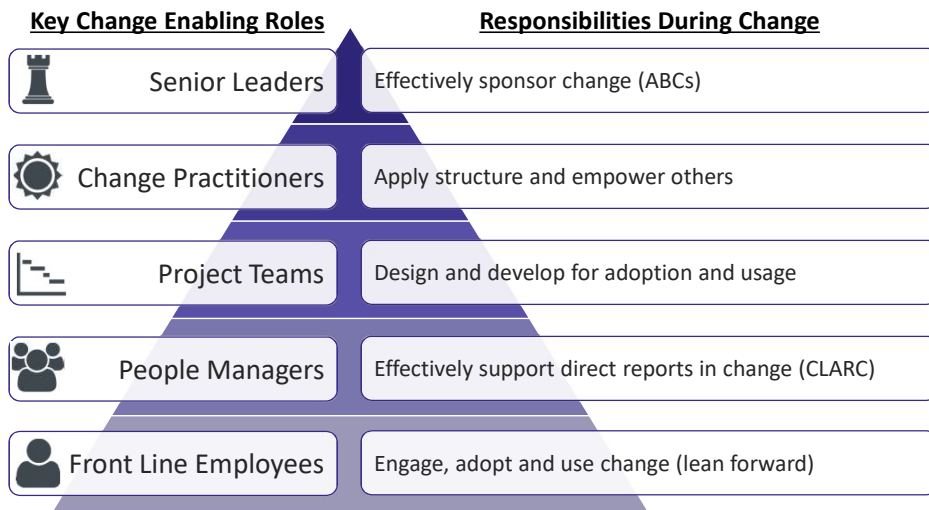
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# Roles in CM *in Agile*

## Roles in CM Foundation

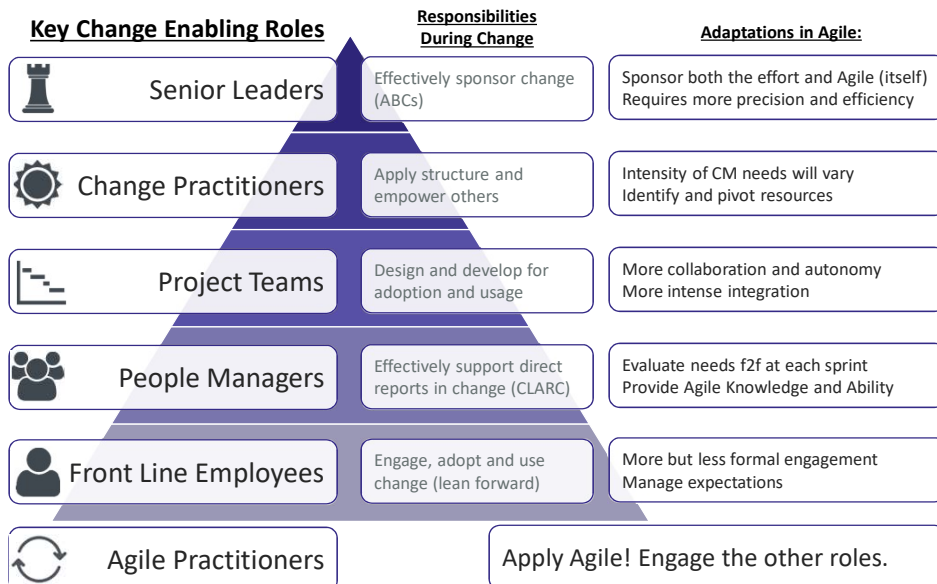


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## Roles in CM + Agile



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Source: Prosci Intersection of Change Management and Agile report

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## Intersection of Agile and Change Management: Agenda

### Foundation

of Agile and Change Management

### The Research

IN Agile / TO Agile

### Prosci Integration

Approach + Agile

ADKAR + Agile

5 Levers + Agile

Roles + Agile

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## ***Prosci*** Solutions

Delivering organizational results by  
catalyzing individual transitions

<http://www.prosci.com>  
[solutions@prosci.com](mailto:solutions@prosci.com)

Build individual change competencies  
Apply change management on initiatives  
Embed organizational change capability