Selecting an Agile Coach: Critical Considerations

August 20, 2016

I originally wrote this article / whitepaper in the Summer of 2013. At the time, I shared it via a 2-part blog post. The feedback I received was incredibly positive and more than I expected. It seemed as if folks were really struggling with the "how" to hiring agile coaches. And this article seemed to provide a welcome framework. Three years later, I thought I'd update the article a bit. However, the search for high-value and high-impact agile coaches remains a challenge. Hope it continues to help...

At the risk of sounding self-serving, I thought I'd share some thoughts around how to select an agile coach. Since the Agile Methods nearly always require a seasoned guiding hand to help you accelerate your adoption and transformation, this is one of the more important decisions you'll make. Given that criticality, here is a list of critical areas I consider when hiring a coach and in sharpening my own experiences as an agile coach.

First, Reflect

You'll want to consider WHY you're looking for a coach. What challenges are you facing? What sorts of skills are you expecting them to bring? If you're just starting up, then finding a coach that has experience "jump starting" agile teams will be your initial goal. If you've been doing agile for a while and are looking for a "tune up" and assessment, then that might take you in a slightly different direction. Most coaches can handle both sides of that spectrum, but it's useful to be clear on where you are on the agile adoption curve.

Realize that there's a special relationship established between the agile coach and the organization they're coaching. First of all, you need to be prepared to establish a partnership with your coach. Be ready to share your "dirty laundry" and your personal challenges. Be ready to trust the coaches you select; not only their experience, but their character and integrity.

Be open to learning from them, but be also open to challenging them to "raise the bar" in your agile adoption efforts.

And important part of any coaching relationship is measurement. How will you measure the results they provide? A typical measurement scenario is to focus on the teams and their productivity —measuring before, during and after coaching. But it's not as simple as that. Agile measures are quite different than traditional measures, so you'll want to do some research. You'll also want to include your team in the interviewing and measure their personal reactions to the coaches.

Finally, do some initial research into agile coaching firms and individuals. Leverage your network and LinkedIn to survey the landscape. Word of mouth and personal recommendations are a powerful place to begin your search.

Work Experience

It's normal for agile coaches to either focus on the organizational / team coaching (non-technical) areas or on technical skills coaching areas.

Technical coaches usually focus on tooling and technical practices, for example Continuous Integration or Deployment (CI/CD), Test-Driven Development (TDD), and Refactoring & Patterns. For these coaches you're looking for work experience that often aligns with your technology stack and domain dynamics. Often architects or very senior developers transition into this style of coaching.

You'll also want to see some public speaking and teaching in their backgrounds to ensure they can effectively teach their skills in pairs and small groups. Quite often the interview or selection of these coaches is more of an audition—where the come in and pair with team members in your organization. You'll be assessing technical coaching chops by "doing" rather than "telling".

For organizational coaches, beyond the direct agile coaching experience, you also want to consider the work experience behind the coach. What technical background and roles have they held? What sort of diversity in those roles? And have they held leadership roles in organizations.

I've found the best coaches to have a breadth and a depth to their work experience that rounds them out. For example, having held architecture, analysis & design, development, and testing roles in a variety of software organizations can be a distinct advantage for these coaches. Another advantage is having grown in their careers to hold senior leadership (Director, VP, and/or C-level) roles.

In general, knowledge of software development, testing, project management, and team leadership is incredibly helpful for coaches. So look for the breadth, but also the depth.

Coaching Experience

Now let's get the elephant on the table. There are simply too many agile coaches around today! It seems like every agilist who has a modicum of experience at a team level is hanging out their coaching shingle. I feel like they're misleading the community and potential clients. Sure, they might have a successful experience or two, but in limited contexts. Agile is simple to grasp, but hard to execute contextually. Only with many years of broad, deep, and varied experience does a coach acquire the skills and instincts to truly guide you.

Is there a magic number of years of experience? Probably not. But I personally look for coaches with around 10+ years of experience. I'm looking for in-the-trenches experience, for example they've been an internal coach as part of an agile transformation, as well as external consultative coaching experience. They've worked with small and large organization, while having encountered entrenched Waterfall and entrepreneurial and open minded start-ups. The point being, they've been "around the block".

Don't necessarily get stuck on coaches having a direct "domain match" to your existing business and product domain. For example, I recently was approached to coach a BI and Analytics team and the client was looking for direct BI experience. From my perspective, I'm not sure that it matters so much, particularly if you're a deeply experienced coach. In fact, domain awareness can sometimes get in the way of your coaching effectiveness.

The Methods

Whether you know it or not, there isn't a succinct agile methodology. Rather there is a 'family' of methods that attempt to support and adhere to the Agile Manifesto and its corresponding values and principles. Some of the more popular method and framework areas include:

- **Methods:** Scrum, Extreme Programming, Kanban, Lean Software, AUP, DSDM, and Crystal. The more widely used are Scrum, XP, and Kanban.
- **Tactics:** Continuous Integration & Continuous Deployment, Test Driven Development (TDD), Pairing, User Stories, Release Planning.
- **Frameworks for Scaling:** SAFe, DAD, Scrum of Scrums, LeSS, Nexus, PMO, Agile COE, Agile CoP, etc.
- **Bodies of Knowledge (BOK's):** PMI-PMBOK, IIBA-BOK, Pragmatic Marketing, PDMA, Testing-BOK, etc.
- **Soft Skills:** Leadership Coaching, Facilitation, Emotional Intelligence, 5 Dysfunctions, Open Space, MBTI or other personality type, etc.

- **Tooling :** Tools become particularly important in at-scale and distributed agile contexts. If tools are a focus, clearly look for matching experience.

The broader the experience your coach brings, real experience mind you, across these areas the more flexible and sound their approaches will be as they tailor things to your context.

What I'm saying is don't get a coach who has a "one size fits all" approach to each of their agile engagements. Varied experience and a context-based approach will always be more valuable to you as you evolve your agile transformation efforts.

Certifications

Again at the risk of sounding self-serving, I think the Scrum Alliance pair of certifications:

- CTC – Certified Team Coach
- CEC – Certified Enterprise Coach

designations are a differentiator for coaches. In particular, they help assure that the coach has demonstrated the skills necessary for each level. In particular, the CEC assures the coach has moved beyond singular team coaching and towards Enterprise-level or organizational transformation coaching at scale. So you gain some assurance that their experience is broad and deep and contextual.

Beyond that, the 'bar' for the CSC is arguably quite high, with ~75% of applicants not being accepted. Not only is your knowledge and skill evaluated, but candidates are interviewed by CEC peers in a rather lengthy and rigorous process. As of this writing, there were approximately 500,000 CSM's in the Scrum Alliance, but only ~80 CSC's in the world, ~40 of which are in North America.

Now I think any certification has to compliment real world experience, so don't blindly hire or engage CEC's. But the credential (s) a coach brings to the table certainly matters and should be a part of your decision-making process.

Models: Full-time embedded vs. Part-time advisor

There seems to be two overriding models in the coaching community.

Some firms want coaches to embed full-time with your teams. The contract is usually for a set period of time and the coaching is by and large continuous. Usually these engagements are in larger organizations so that the coaches can influence more than one team at a time. They typically get involved in

organizational transformation as well. The firms that offer this usually evolve to agile coaching from a pure staff augmentation model, so you see that mindset in the engagements.

The other model, and the one that I subscribe to, is a more part-time coaching model. After some sort of a kick-off event, this model is more tightly coupled to your sprint tempo, with the coaches engaging at the endpoints of each sprint. They help close the previous sprint and then plan for the next. Sometimes they'll provide remote coaching between the endpoints, but it's essentially an iterative model that parallels your own team(s) Sprint and Release tempos.

The key differences in the approaches are cost and organizational autonomy and growth.

The latter approach is typically less costly and promotes the teams to more quickly stand on their own. The coach is there to guide, but the agile transformation effort is not for them, but for the entire organization. It's a teach the organization to fish model.

The former approach does align with most consulting contract experience and it is a simpler business model to orchestrate both for the client company and for the coaching firm. However, often the teams struggle upon coach departure because they've gotten <u>dependent</u> on the coaches.

My experience is that the latter model places pressure on the teams and the organization to become self-directed, self-reliant, and higher performance more quickly. But both models can be effective.

Internal Coaches

If your organization has internal coaches (specific Agile Coaches and/or Sr. ScrumMasters) then part-time advisor model will often focus on "coaching the coaches" in helping the organization grow and mature in its agile practices. The effect can be complimentary and quite powerful.

Trainer vs. Coach

I'll use the CST (Certified Scrum Trainer) vs. CEC (Certified Enterprise Coach) comparison here to make the point.

There are quite a few CST's who also do a bit of coaching. The challenge is the ratio of coaching vs. training. If you teach classes too often, you lose your edge when it comes to "in the trenches" coaching experience and ability. Essentially, you've become too academic and you've lost touch with real world challenges. There are quite a few trainers who do a majority of training and high-level consulting, and very little coaching. In my opinion, they should largely decline coaching assignments as they've lost their real world experience relevancy.

At the same time, every good coach must have the ability to do training classes as part of their toolkit. The key is to looking for coaches first, who are also knowledgeable and experienced trainers. This combination turns out to be the most powerful.

In January 2016, the Scrum Alliance has empowered CEC-level coaches to grant CSM and CSPO certifications for clients (individuals and teams) who have received a minimum of 25 hours of coaching contact time. This is a "game changer" for these coaches in that they can now provide a more holistic agile transformation offering to their clients.

Prescriptive Balance

There is a genre of agile coach that doesn't tell teams how to do things...under any circumstances. They are intentionally non-prescriptive. The thinking generally goes that in order for a self-directed team to form and gel, it's inappropriate to tell them what to do. They have to discover the path on their own, with the coach being their guide. This is honorable and true for a more experienced agile team, but what about providing guidance for new or inexperienced teams?

It would be like throwing a group of 8-10 years olds without baseball experience on a field, giving them the "rule book", and the tools (bats, balls, bases, etc.) and saying — go play baseball. They would be spinning their wheels mightily for quite a while and they might never figure out the nuances of the game.

It turns out that coaches need to be balanced, but also comfortable in giving teams or organizations firm direction when it's necessary and important. Many are uncomfortable with that, and you'll want to stay away from those IF you're just beginning your transformation / adoption.

I believe that constraints, rules, and direction are actually an important part of creating the landscape for agile teams and organizations to mature quickly. It's getting the right level of experience to understand when to tell and when to allow the direction to emerge that is developed across years of coaching experience.

But should you also ensure that your potential coaches aren't "too prescriptive"? Of course, because that will undermine your path to agility as well.

Independent vs. Group Affiliations

One of the more difficult decisions you have to make is who to approach. Coaches essentially come from the following affiliations:

Type	Description	Examples	PRO	CON
Independent coach	Either a sole proprietor or a small collection of like-minded coaches; usually have training as a service. Can be regional to international.	Esther Derby, Johanna Rothman, Bob Galen, Lyssa Adkins, Mike Cohn	Experienced, vertical areas of skill, well known & established, consistency & quality	Bandwidth and availability - scheduling. Mostly part-time engagements, higher costs
Agile Coaching firm	A company/group that specializes in agile coaching. Often training is part of their services portfolio. Usually regionally focused.	Leading Agile, LeanDog, LitheSpeed, Zenergy	Consistent coaching model, bench strength and collaboration	Varied coaching skills, typically want to embed coaches, higher costs
Agile Tooling firm	A company whose primary business model is tooling, but they've also provided training and coaching services	Rally, VersionOne, Thoughtworks	If you're 'leading' your adoption w/tooling, bundled services.	Tooling can get in the way – conflicted goals, inconsistent coaching
Search firm	A search & recruiting firm that has 'discovered' agile methods and coaching services. Dual priority of coaching & staffing / staff augmentation	SolutionsIQ, cPrime, Eliasson Group, Matrix Resources	Aggressive pricing, bundled services, ability to find coaches – scale themselves	Inconsistent coaching quality, coach retention, it's not their primary business model

Note: I used my best judgment in providing examples that I'm familiar with.

The major advantage with the firm model is they will have multiple coaches to serve your needs. This usually surfaces in bench strength and more timely support of your ad-hoc needs. However, these firms will have coaches at varying levels of experience and you'll rarely get the chance to cherry pick the best coach that provides your best match. Instead you'll be engaging the firm rather than a specific coach.

When engaging individuals, you'll almost always engage a sole proprietor with perhaps a handful of like-minded colleague partners behind them. Often you'll have to wait for their schedules to "free up" and, if they run into problems such as illness, it may impact your engagement.

However, the advantage is that you're engaging a known quantity and there will be no unintended "bait and switch" activity going on. It also makes selecting the coach easier because you'll be interacting directly with your coach.

I would caution you to not always go for speed in acquiring a coach. I had a client last year who wanted to engage me for help. My schedule was such that they needed to wait for 5 months for my services. I asked them if they wanted another coach or a referral to another firm. They simply said no. That they were willing to wait in order to get higher quality coaching. In my experience, that sort of focused discipline is rare; although necessary in today's hot agile coaching market.

Purist vs. Pragmatist

For over 10 years I've been categorizing agilists, myself included, as either a purists or pragmatists. There's nothing wrong with either side, but it's how they approach implementing and coaching the methods that is at play.

A purist often focuses on one method, and while promoting it, doesn't take liberties in the implementation. For example, a purist Scrum coach would implement core Scrum as defined in the Scrum Guide. There would be very little "wiggle room" in their implementation and, if you deviated from anything in the definition, you'd be confronted for a ScrumButt.

I liken pragmatists to being passionate and determined in their agile adoption guidance. However, they apply experience, common sense, and some situational flexibility to their engagements. They consider where their client is "coming from", before they suggest next steps—so as to not set the bar unreachably high.

I liken myself to be a pragmatist, but know many purist coaches. The world needs both kinds, but you'll probably want to be uniquely selective to one side or the other. If you're selecting multiple (or a team of) coaches, mixing and matching at this level rarely produces good results.

Professional Engagement

The focus here is does the coach contribute to the overall agile community? In particular, have they written coaching guidance via books, blogs, and articles? Do they have recordings available of presentations or podcasts that you can review? And importantly, how long and how active have they been contributing. This is also a wonderful way to verify the coaches experience claims.

For example, you can literally google me and see that I've been sharing agile content at a wide variety of conferences and professional groups since ~2003. While that sustained engagement might be tough for many to match, it is indicative of what you should be able to find out.

Additionally, ask do they volunteer in the agile community? For example, have they presented at a Scrum Gathering or Agile Conference. Do they participate in their local agile groups, as a leader, presenter, and attendee?

A big part of this is checking the "passion level" of the coach. Are they an agile coach because they're simply interested in the money or are they passionate about agile and are they willing to "give back" to the wonderful agile community we have.

The "Match"

Beyond pure experience and skills, the coaches' personality and style needs to mesh with your teams, your leadership team, and your culture. One of the things I do for prospective clients is give a free lunch & learn as a means of getting to know one other. Borrowing a term from a famous dating service, I refer to it as "It's Just Lunch". This is the chance for us to meet and explore the compatibility between myself and the organization.

And don't forget the match goes both ways. As a coach, I want to make sure that the organization I'm coaching aligns with my own principles and practices. I'm primarily looking at the leadership team to determine if they're sufficiently knowledgeable and committed enough to guide their teams through the agile transformation. And they're checking me out to ensure I don't do "too much damage" during the transformation.

I highly recommend this approach of "trying before you buy"; usually by having immersed discussions and potential 'auditions' for nearly a day.

Rates

Of course rates matter. But my recommendation is to make cost a secondary consideration. You'll want to get the best coaches available for your organization, by aligning with as many of these selection considerations as possible. I always think it best to defer rate discussions until quite late in the process.

Once you have narrowed the field to one or two coaches or firms, then bring rates into play. Usually the length of the engagement is a significant factor for discounts and some coaches even provide a pro bono aspect to their coaching, so explore these as options. In the end, don't let money influence you towards a lesser coach. You'll pay dearly for this misstep.

As with any agile endeavor, quality matters.

Checking References

Finally, to check references or not to check, that is the question. The answer is…please check!

But be sensitive to the timing of checking references. You'll want to go through your due diligence and basic analysis first. Most coaches only want to engage their references (remember they're customers like you) if the deal is reaching maturity and as a near final step in the process.

And don't ask for too many references. One or two should suffice. Once you get the references, you want to strike quickly. The coach has probably primed the references for your call, so you don't want to take 2-3-4 weeks and then surprise them out of context.

Wrapping up

When your interviewing your coaches, please strive to create conversations instead of simply Q&A interviewing. Not that long ago, I went through a coaching interview. It was a panel of 4 interviewers and for 90 minutes they peppered me with questions. Only at the very end, did I have some time for my own questions and they were cut off by the lack of time.

This isn't a good interviewing strategy in general and certainly not for an experienced coach. I'd strongly encourage for you to ask situational, open-ended questions in an effort to share stories and get to learn about each other. In other words, simply have a conversation. I think you'll get more out it.

Here are questions and a critical consideration list when it comes to selecting your next agile coach. You may not want to run through all of them, but I hope they help your selection conversations:

- ✓ How much experience do they have? Internal vs. external coaching? What about variety in their coaching? Explore what 'typical' coaching engagements look like—how do they 'enter' an organization? And when do they know it's time to 'exit'?
- ✓ How much method breadth do they have within their coaching? Do they apply cross aspects of one method to others? Ask for an example or two of how.
- ✓ It's one thing to be well-read. It's another to be well experienced. Explore the latter. Ask about their successes AND their failures as a coach. What determines success? Or failure?
- ✓ Ask the coach if they've ever turned away clients. And if so, what are the general reasons for this decision. Here you're looking for indications of their selection criteria and "hot buttons" for agile coaching success.
- ✓ Check their certifications. This is a two-edged sword. Some coaches have a literal "alphabet soup" of credentials. Others have a much smaller list. Some certifications are much stronger

than others. For example the CSC and CST. You can go to the Scrum Alliance site and check certifications here:

- ✓ It's not easy to determine whether your coach is a purist or pragmatist. Questions on non-Core Scrum activities, such as Hardening Sprints or Sprint #0 or multi-tasking Scrum Masters will probably evoke discussions that will give you a clue as to their 'leanage'.
- ✓ Have a "bench strength" conversation with your coach, if they're an individual or part of a group. Speak to coaching consistency as they scale. Ask how many teams they can coach in parallel with their preferred model.
- ✓ Ask your coach where they spend the most time coaching, at the team level, management level, or leadership level. Does organizational maturity influence these percentages? Ask where they are the most "comfortable"?
- ✓ Ask your coach how they serve the agile community? How do they share lessons learned? Have they ever coached an individual or team pro bono? Ask when and why. What about sharing their knowledge and wisdom—how have they done that. Or if they haven't, ask when they plan on doing so.
- ✓ Try to ascertain the ego level of the coach. Ask if one of their coached teams or organizations fail (or regress) how do they take that? Have they failed? How do they retrospect on failures and successes? How do they adjust their coaching styles for different situations—ask for a couple of examples.
- ✓ Ask them to rate themselves as coaches. Ask them to identify 2 coaches who are better than they are; and ask why? Ask them to share who they've been mentored by most recently and what have they learned.

One final point, please don't perceive these steps as daunting to the point of preventing you from pursuing a coach. I see so many agile teams that could use a solid coach that I don't want the selection process to scare you away. Take whichever of these considerations make sense to you and leverage them in your search. I'd rather you simplify the criteria and steps and get the best coach possible, then shy away entirely.