

A close-up photograph of several light-colored wooden pawns on a dark wooden surface. A hand is holding a brass key with a stylized bit, inserting it into the hole of the central pawn. The background is dark and out of focus.

# Student Workbook

# Agile Coaching Masterclass


MATTHEW HODGSON

Oct 2022  
Melbourne, AUSTRALIA

 @zenexmachina


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**Agenda**




**What is coaching?**

- Coaching teams
- 8 stances
- ICF framework
- Coaching individuals




**Defining context**

- Vroom's decision tree
- Power theory
- Coaching in teams



**Culture and change**

- Model for culture
- Coaching executives & stakeholders



**Coaching the organisation**

- Guardrails
- Consistency
- Team coaching

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**What is Coaching?**

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**Models: Meta context**



- What does the relationship mean between observation and your mental model?
- Are these elements valid?
- "What do I know now?"

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Understanding models

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Model: Case conceptualisation

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Model: 8 Stances of Agile Coaching

Coaching stance is only **one** approach.

**8 elements of agile coaching**

- MENTOR**: Best used when there is a lack of clear or understood potential for self-management. Work "beside" them, not "for" them.
- CONSULTANT**: Useful when there is a lack of consistency of process, practice, knowledge and understanding.
- COACH**: Lack of "growth mindset" with potential problems in goal setting. Requires permission. Coaching contract with the client AND Coaching. Agreement with the team/individual per session.
- COLLABORATOR**: Treats dysfunction, the removal of effort/resources and escalation prior to other professionals. Requires permission.
- CHANGING AGENT**: Lack of formal plans on organizational design including governance on the nature of or purpose of the change.
- FACILITATOR**: Best used to build without leadership that will start to promote psychological safety for contextual role/unmet human potential.
- LEAN LEADER**: Useful when there is no consensus for collaborative outcomes. This helps achieve and promote focus.
- TRAINER**: Best used to build without leadership that will start to promote psychological safety for contextual role/unmet human potential.

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## Defining Coaching?



Partnering with clients in a **thought-provoking** and creative process that inspires them to maximise their personal and professional potential. The process of coaching often unlocks previously untapped sources of imagination, productivity and leadership.

International Coaching Federation (ICF)

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## Coaching in an agile context



### Client

- The person paying for the coaching
- Sets the business goals for coaching – **what impact do I want to make? Impact, flow, capability?**
- Sets the guardrails for coaching – who is the target for coaching?



### Agile Coach

- Person delivering the coaching service
- Coach
- Counsellor
- Change agent
- Facilitator
- Mentor
- Trainer
- Consultant
- Lean leader
- Collaborate to set metrics and targets



### Executive



### Manager



### Release Train Engineer



### Product Manager



### Product Owner



### Scrum Master



### Team(s)



### Stakeholders

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## ICF Coaching Contract

Forms part of the "permission" required and guardrails for effective coaching outcomes. It can even form the basis of a coaching team's "team agreement".



### Definition of Coaching

- Collaborative partnership
- Facilitate business goals and carry out a strategy/plan for those goals
- Not a substitute for psychological support for coaches



### Coach-Client relationship

- Client agrees to communicate openly
- Coach agrees to maintain ethics of behaviour
- **Goals, impacts and outcomes**
- Termination



### Services

- Coaching program
- Methods
- **Other parties involved**



### Fees

- Costs / cost recovery model
- Billing frequency
- Commercial



### Procedure

- Meeting frequency
- Time / place / schedule
- **Other parties involved**
- **Metrics**
- **Frequency of metrics/reporting**



### Confidentiality

- Meeting frequency
- Time / place / schedule
- **Client / Coach / Teams**



### Release of information

- Topics can be anonymously and hypothetically shared with other coaching professionals for consultation purposes

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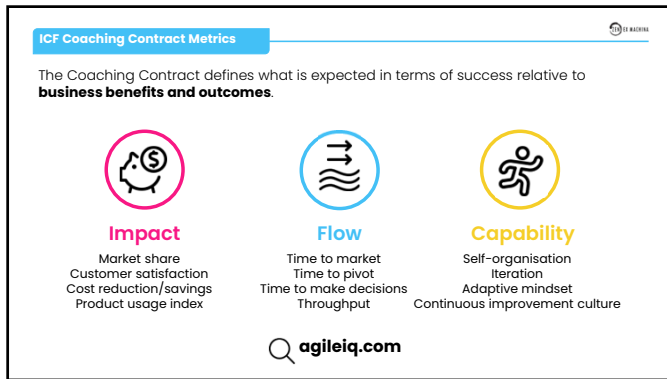
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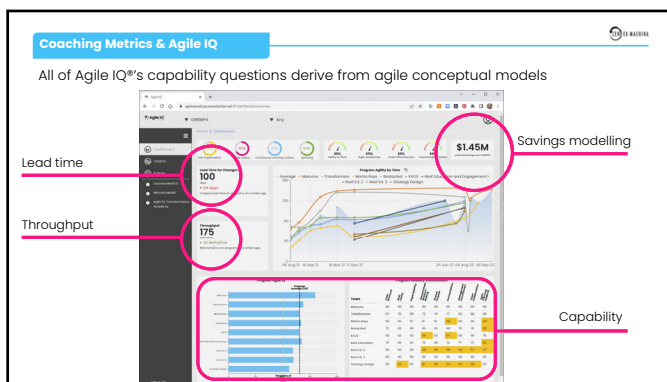
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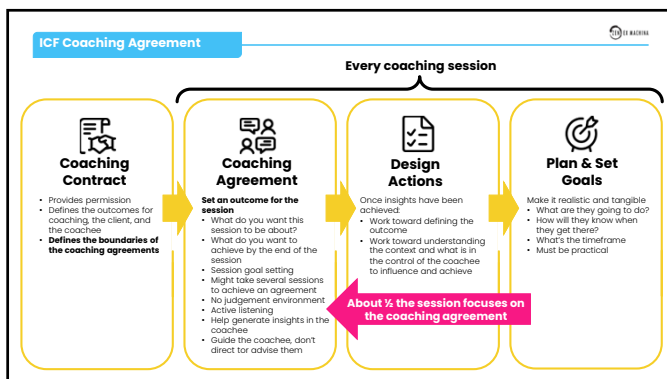
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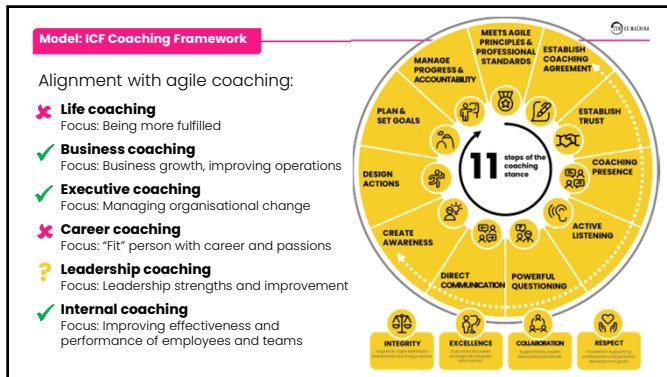
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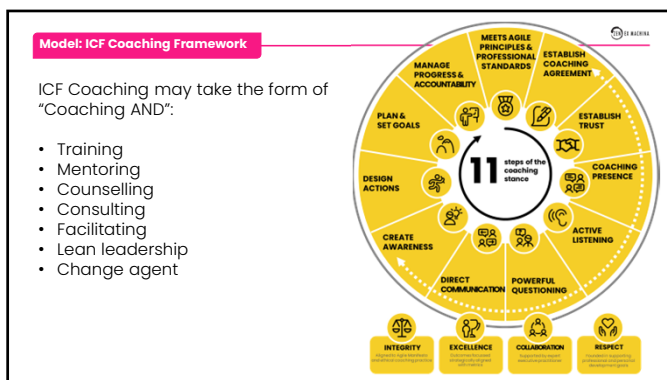
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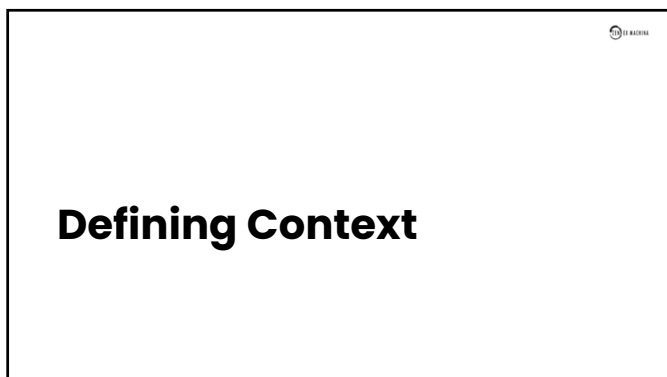
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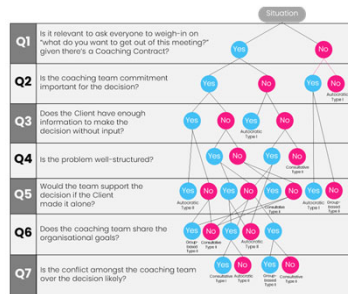
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### Model: Making good decisions with Vroom's Decision Tree

- 7 critical questions to create a decision tree.
- Enables Clients to make the right choice.
- Associated with quality, commitment, problem structure, leader's information, goal congruence, and subordinate conflict.
- All decisions serve the Client and the Coaching Contract over individual or a single team's needs.



### Model: Power Theory (French & Raven)

Coaching Area	Description
Coercion	Impersonal Coercion and Personal Coercion
Reward	Impersonal Reward and Personal Reward
Legitimacy	Formal Legitimacy (position power), Legitimacy of Reciprocity, Equity and Dependence (Powerlessness)
Expert	Positive and Negative Expert
Referent	Positive and Negative Referent
Informational	Direct and Indirect Information

- Build "credit" by using power to invest in the group's expectations.
- Debit when you seek to influence change.
- If you have no credit, you can't influence change (Hollander)

### Model: Power Theory (French & Raven)

Understanding who else has influence can help shape the behaviour you want on your behalf.



#### Experts

- Industry gurus
- Data & reports
- Whitepapers
- Tier 1 consulting companies
- Fortune 500

- Power Wielded**
- Expert Power
  - Information Power



#### Friends

- People they like
- People they associate with

- Referent Power
- Informational Power



#### Peers

- People they look up to
- People they know in their "industry"

- Referent Power
- Expert Power



#### Managers

- People they report to
- HR Managers
- Capability Managers/Leads

- Legitimate Power
- Reward Power
- Coercive Power
- Informational Power



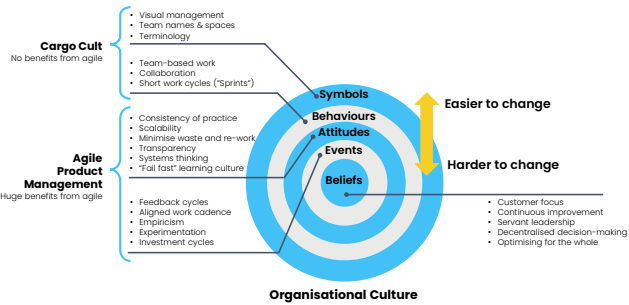
#### In-Group

- Others in the same "team"
- The team norm

- Reward Power
- Coercive Power
- Informational Power

# Culture and change

## Model: Understanding Culture (Waisfisz)

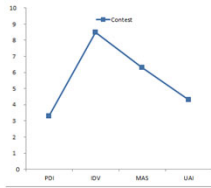


## Model: Culture Clusters





## Model: Self-interest Cluster



**Hierarchy:** Low  
**Individualism:** High  
**Hero Work:** Med  
**Risk Avoidance:** Med

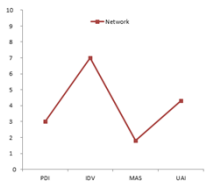
People can be willing to overcome resistance to change if one is able to create the image of a 'burning platform'

E.g. "if we don't jump now, we will burn".

**Influencing Change:** Show that doing things in a different way is good for the next career step, or for gaining a material reward. A good leader is supposed to be able to do this.

The reference point is the individual employee and his individual definition of self-interest: **"what's in it for me?"**

## Model: Network Cluster



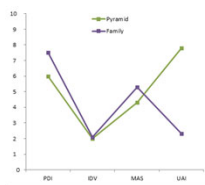
**Hierarchy:** Low  
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There is a reluctance to believe that leaders or managers can define what is good for the organisation from a 'higher' position.

**Influencing Change:** People's motivation is connected to a feeling of autonomy inside their own work field. In general, people believe that they, more than others, know what is going on in their team and what important steps should be taken to improve the situation.

**The only good decisions are those where all stakeholders are consulted from the beginning and participate in the decision-making process.**

## Model: Pyramid Cluster



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**Individualism:** Low  
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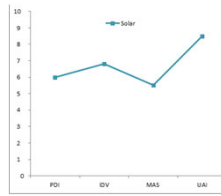
The privilege to define new priorities and directions lies at the top of the organisation. The person at the top is supposed to indicate what he sees as the common interest for all in the company. The implicit expectation is that the person at the top has a complete overview of what is happening and therefore can decide what the right decision is. Having made a decision, this person should be clear in cascading down the new mandates giving unambiguous directions.

**Influencing Change:** Do this in formal ways by means of written documentation and instructions.

**Visibility of the commitment of the person at the top is essential.**

In both types, employees expect the top of the organisation to be concerned about the whole company's interest and be willing to protect the group in the change process.

## Model: Future Public Interest Cluster



**Hierarchy:** High  
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**Hero Work:** High  
**Risk Avoidance:** High

The person at the top has the sole right to decide what the new direct and priorities should be.

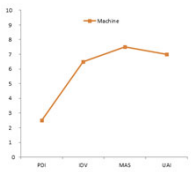
**Influencing Change:** The implicit belief is that the person at the top has an overview of everything that is taking place and they have the overview necessary to decide on new directions. The company's current best interest is not a priority, but the company's future.

**A leader is respected and feared.**

A manager should be visible, for example, by walking around and gathering information. But a manager who controls too obviously, and who involves himself in the details of work, is utterly demotivating to people who take pride in their work.

As change occurs, it is imperative that the person at the top is committed otherwise people will not follow.

## Model: Well-Oiled Machine



**Hierarchy:** Low  
**Individualism:** High  
**Hero Work:** High  
**Risk Avoidance:** High

Characterised by a formal leadership style relying on norms, goals and procedures with middle managers operating in a collegial and facilitative community-based mode.

**Influencing Change:** The most important issue is that perceived and recognised experts (internal or external) are the ones who are in the best position to define new directions.

**It is important to build up credibility** in order to be recognised as an expert before trying to influence change.

## Actions: What is your culture?



Identify the culture cluster of your immediate context.

Complete the **Culture section** of My Environment on your Coach's Canvas.

In Actions, identify one thing you need to do to start to influence positive change.

	Hierarchy	Individualism	Hero-Work	Risk-Avoidance	Short-term-focus	Goal-orientation	Influencing Change
Context Cluster/ Self-interest	Low	High	Med	Med	N/A	N/A	Individual employees and their individual definition of self-interest
Network Cluster/ Shared-interest	Low	High	Low	Med	N/A	N/A	Only good decisions are those where all stakeholders are consulted from the beginning
Pyramid/Family Cluster/ Common-interest	High	Low	Med	High	Low	N/A	The person at the top must be committed otherwise people will not follow
Solar Cluster/ Future Public-interest	High	High	High	High	Low	High	The person at the top must be committed otherwise people will not follow
Well-Oiled Cluster/ Informed by experts	Low	High	High	High	Med	Med	Change follows the advice of expert leaders acting in alignment

## Coaching the organisation

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### What is enterprise agility?

 No contextual model	 Has a contextual model
Agile mindset	Manifesto & 12 Principles
Ways of Working	Practices: Pairing, Horizon Planning, etc.
(Agile) project management	Frameworks: Scrum, Kanban, Lean, XP, etc
"Spotify Model"	
Scrumban	
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<b>Impact:</b> No consistency	Consistency

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### Impacts for consistency



**Lack of alignment to business outcomes:** Most strategies set project management goals, such as on-time, on-budget, and activity based delivery milestones. **Inconsistent with agile product management metrics.** Upon completion, business then seeks to gain benefits and outcomes. They struggle to establish and iteratively reap true impact and outcomes in financial language, such as cost savings and cost of delay.



**Lack of awareness:** People fear what they don't understand. **The majority of staff reject a transformation's new roles,** responsibilities and processes, even if it will improve their lives, unless they are slowly, consistently educated.



**Micromanagement:** Traditional management culture requires task-management and direction. Agile teams require self-organisation through establishing consistent guardrails for decision-making. **The clash of the two creates inconsistency and friction** that undermines progress of transformation goals.



**Terminology:** Language is a key influencer of culture. When people don't receive industry-aligned training, coaching, or their knowledge and skills are out-of-date, **misunderstanding of new practices increases,** including why they are being adopted. Not using experienced practitioners to coach and train people is a key factor in failure.

Source: Digital at (2022) 10th annual State of Agile Report

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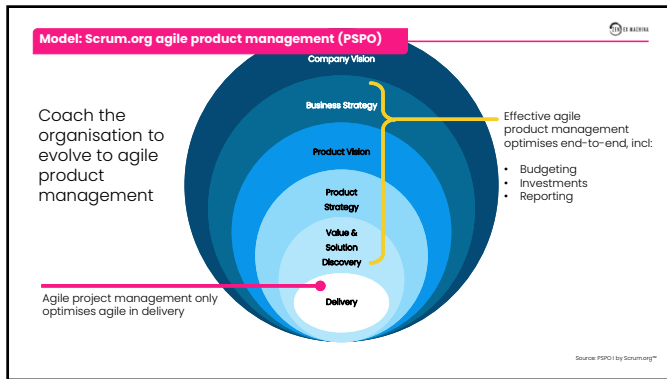
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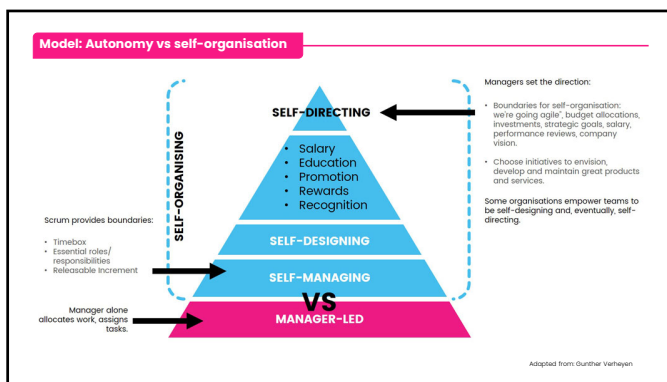
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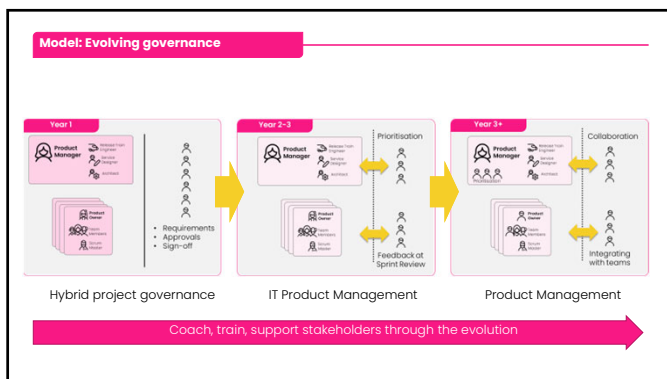
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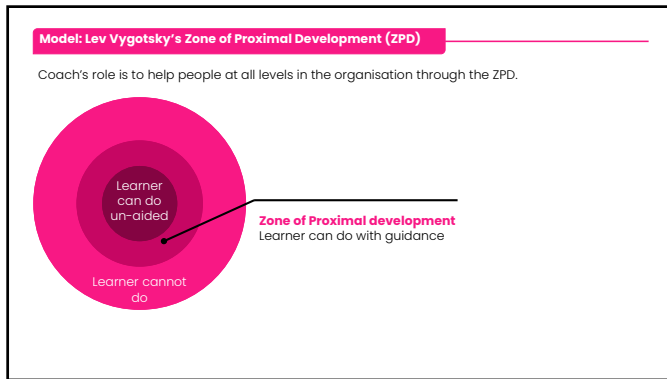
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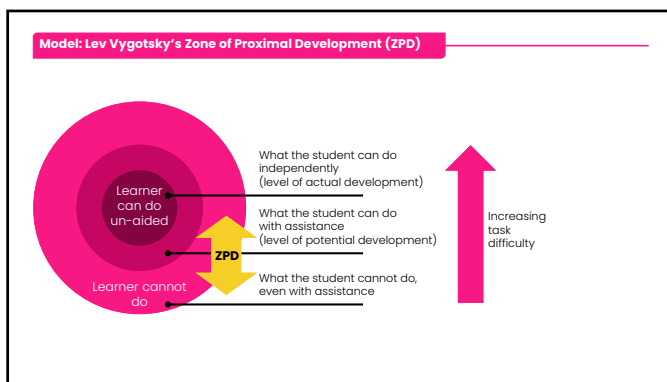
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### Coaching for enterprise agility



Agile is the company's Operating Model, not a team's "way of working".

#### Executive

- Set guardrails: Minimum roles, events, artefacts, practices to for teams to self-manage.

#### Traditional Managers

- Set up cross-functional teams (not multi-disciplinary teams).
- Reinforce consistency and alignment.
- Identify minimum standards for quality (Definition of Done).
- Shift to managing and improving capability not work.

#### Team Leadership

- Shift to management of work through Product Management/Product Owners.
- Shift to managing the effectiveness of the operating model.

#### Coaching Teams

- Implement the guardrails through the 8 stances.
- Metrics and feedback loops on effectiveness (paired with Scrum Masters) to executive.

#### Coaching Stakeholders

- Break down the barriers between teams and stakeholders.
- Work to help them to reduce decision latency.

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### Action: Coaching the enterprise



#### Write on your Coach's Canvas under **Focus**

- Allocate 15 points in total where you current coaching focus is **now**

#### Write under **Actions for Improvement**

- Where do you need to focus more and focus less to improve enterprise agility?

  
Executive

  
Product Owner

  
Release Train Engineer

  
Team(s)

  
Manager

  
Scrum Master

  
Product Manager

  
Stakeholders

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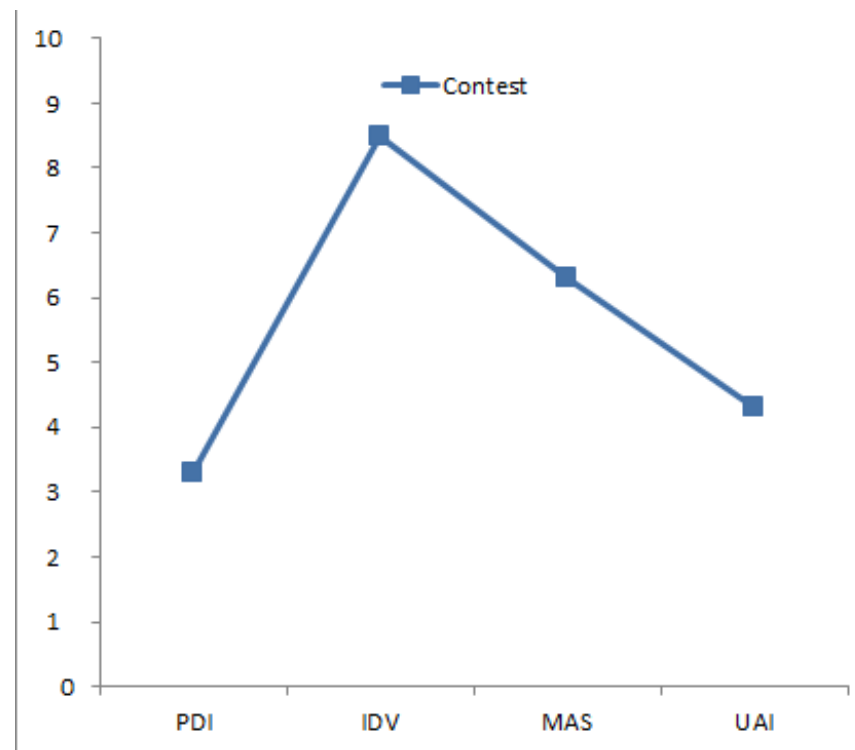
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## Model: Self-interest Cluster



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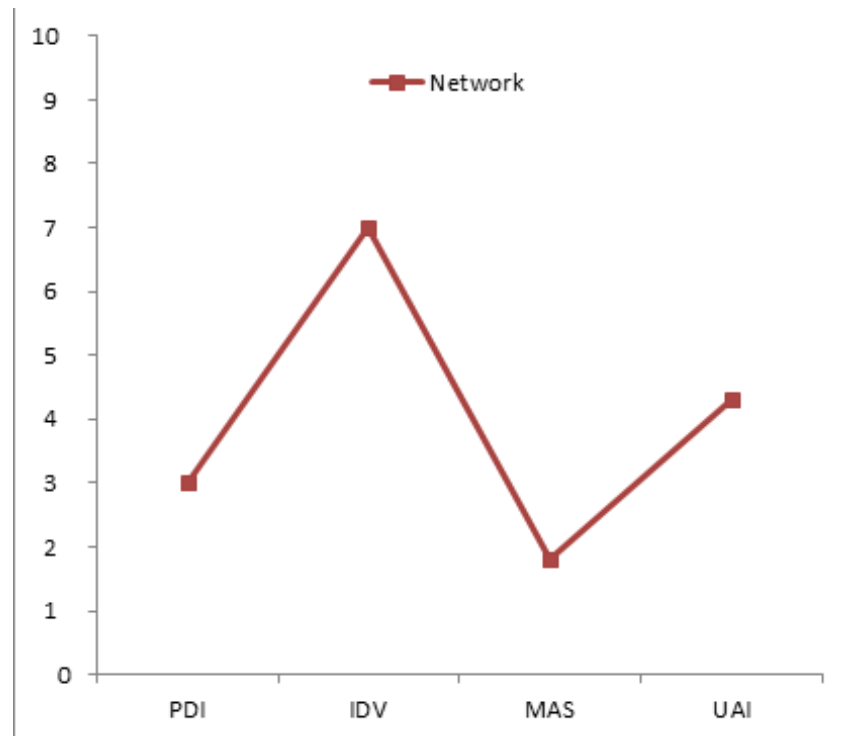
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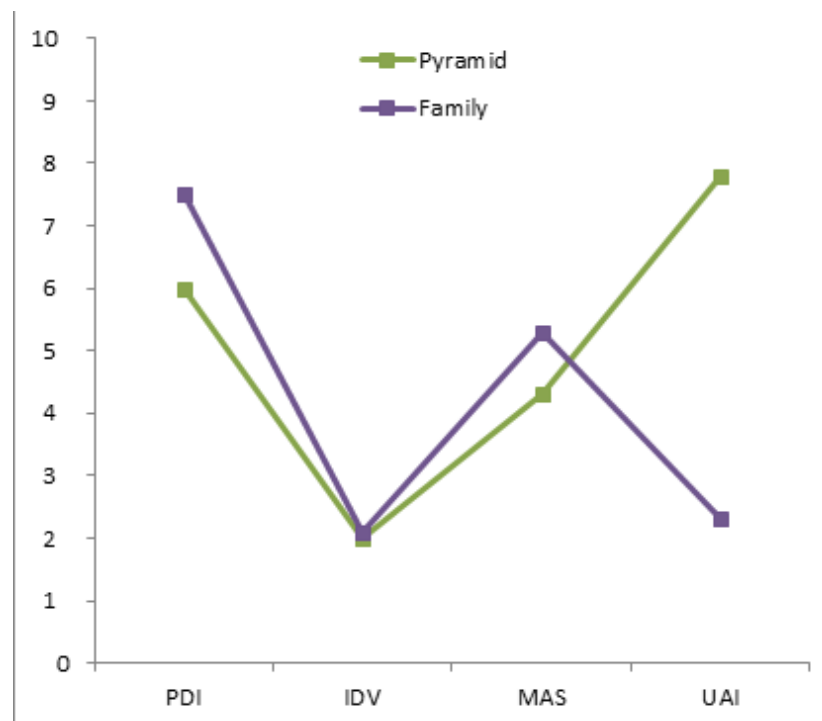
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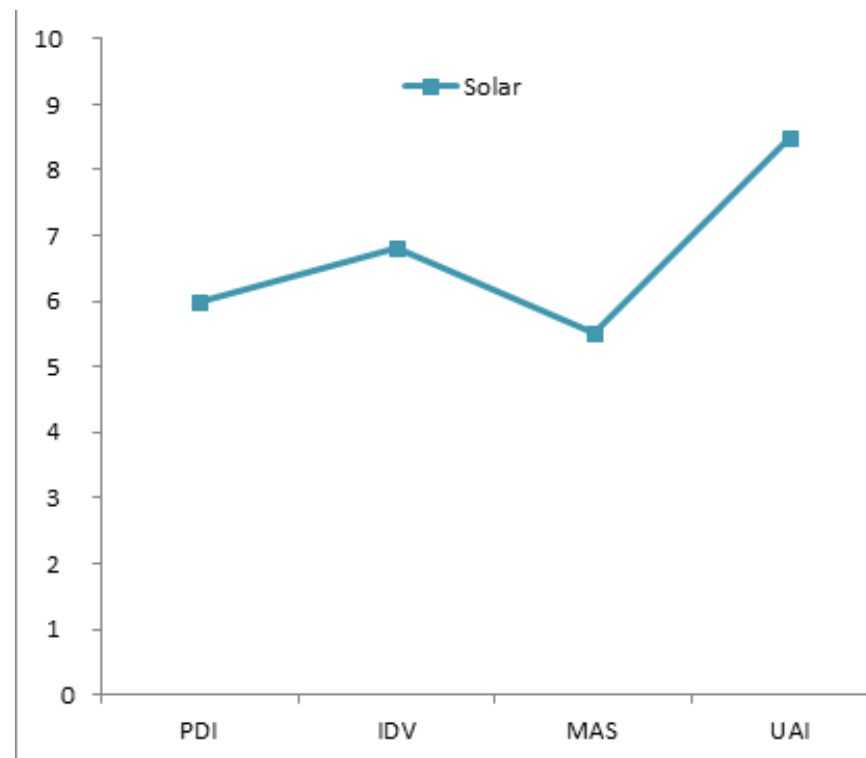
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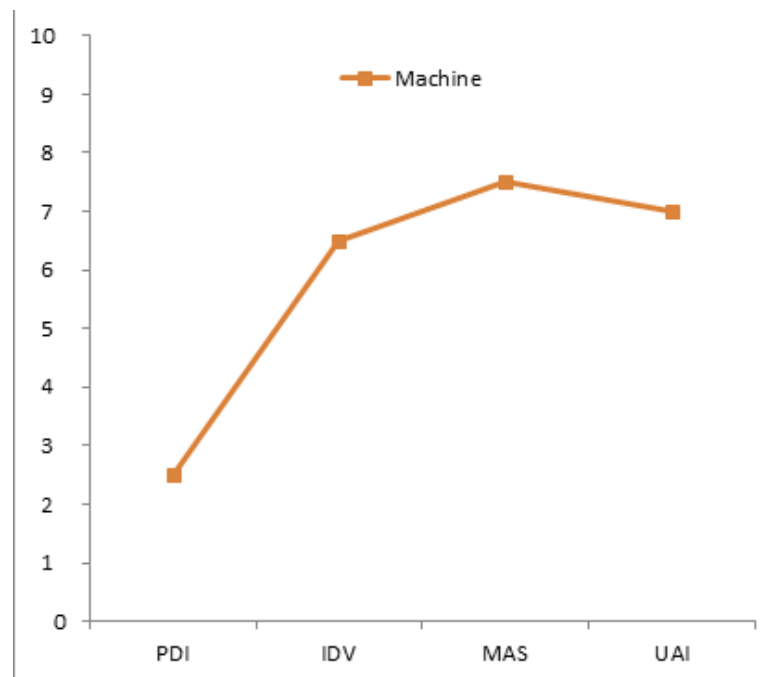
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NAME

Skills

Consultant	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Coach	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Counsellor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Change Agent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Facilitator	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lean Leader	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trainer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mentor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Power

Coercion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reward	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Legitimacy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Expert	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Referent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Informational	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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Focus

Executive	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Managers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Product Manager	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
RTE	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Product Owner	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Scrum Master	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Teams	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Stakeholders	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

My Environment

Hierarchy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Individualism	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hero Work	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Risk Avoidance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Short-term focus	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conservative	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Culture

Self-interest	<input type="radio"/>	What’s in it for me, my career, my ego?
Network	<input type="radio"/>	Elicit input and undertake broad consultation.
Pyramid	<input type="radio"/>	Focus on protecting the company from the top down.
Future public interest	<input type="radio"/>	The company’s long term interests are paramount. Respect and fear leaders.
Well-oiled machine	<input type="radio"/>	Agreed upon balanced input by experts.

Models and Frameworks

Models I Know

Models I Need to Understand More

Actions for Improvement

## About Zen Ex Machina

Zen Ex Machina (ZXM) is the agile management consulting firm that executives seek out when they want results from their digital transformation.

### **What sets us apart**

Our focus is the improvement of 1M working lives – executives, leadership and teams – by 2025 through contemporary ways of working. We focus on making impacts and outcomes by understanding our clients strategic drivers and using deep collaboration to achieve them.

### **What we do**

We advise on business transformation, enterprise agility, strategy, operations and tactics. We do this by providing independent, objective, and research-based agile consulting, founded in the psychology of teams, behaviour and change management. Ranging in scope from a short strategy session to custom coaching, ZXM services connect you directly with experienced, industry certified agile practitioners who apply expert insight to your specific business challenges.

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