

Sensemaking in the Agile Forest

Culture makes or breaks your agile transition¹

Henny Portman

Introduction²

We all know Peter Drucker’s famous quote ‘*Culture eats strategy for breakfast*’ and I transformed that into ‘*Culture makes or breaks your agile transition*’. For me this is reason number one why so many agile transitions fail. In this article I explain what I mean with culture, I make some references to books or articles explaining culture and I make a reference to my *Bird’s eye view on the agile forest* and elaborate on the, what I call, culture-targeted frameworks or ways of working.

Culture

The last three or four Annual State of Agile Reports³ show that one of the Leading causes of failed agile projects is the observation ‘*Organizational culture at odds with agile values*’.

If I look at culture in relation to change, I am looking at the values of the organization, the structure of an organization, the expectations we have, the practices we use and the behaviors we show.

Dominik Maximini made a great comparison between a traditional organization and an agile organization in his book *The Scrum Culture*⁴.

Traditional organization	Agile organization
Position / function	Role
Expert	Generalist
Team lead	Coach
Product / Project Manager	Product Manager / Product Owner
Responsibility of line management: team, daily operation	Responsibility of line management: individual (focus intrinsic motivation), strategy
Passiveness	Activeness
Planning of uncertainty over a long horizon	Planning for a short and clear time horizon
In-transparency	Transparency
Presence	Accomplishment
Customer as an alien	Involvement of customers

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² This article is an updated version of the agile culture article in *Blue Striped Frog – The agile community – Magazine* (2nd edition) 2021

³ <https://stateofagile.com/#>

⁴ Maximini, Dominik (2016). *The Scrum Culture*, Springer, Switzerland

Delegation of responsibility	Adoption of responsibility
Control	Self-responsibility – positive idea of man
Job	Passion

Jeff Sutherland wrote in his article *Agile at Scale* (Harvard Business Review)⁵ ‘No agile team should be launched unless and until it is ready to begin!’ He states that an agile team is ready when it is:

- Focused on a major business opportunity with a lot at stake
- Responsible for specific outcomes
- Trusted to work autonomously - guided by clear decision rights, properly resourced, and staffed with a small group of multidisciplinary experts who are passionate about the opportunity
- Committed to apply agile values, principles, and practices
- Empowered to collaborate closely with customers
- Able to create rapid prototypes and fast feedback loops
- Supported by senior executives who will address impediments and drive adoption of the team’s work.

Jack Duggal looks in his book *The DNA of strategy execution* whether organizations are organized to execute or organized to learn.

Organizing to execute	Organizing to learn
Confirm and follow rules	Experiment and solve problems
Objective – choose among defined options	Empirical – experiment through trial and error
Learning before doing	Learning from doing
Did YOU do it right?	Did WE learn?
Separate expertise	Integrate expertise
Drive out variance	Use variance to analyze and improve
Works when path forward is clear	Works when path forward is not clear

When I look at culture, I am looking for the mindset of people. Are we solving problems or are we exploring opportunities, are we reactive or proactive, are we anxious or do we trust each other (including management), can we make mistakes (as long as it goes fast, and we don’t do it twice) or are no mistakes allowed. Are we making decisions at the lowest possible level or is decision-making centralized? Decision making and how long it takes before decisions have been made is the key topic and reason for project failure in one of Standish group’s CHAOS Reports⁶.

⁵ HBR, MAY-JUNE 2018, Agile at scale

⁶ Standish Group, *CHAOS Report 2018: Decision Latency Theory: It’s All About the Interval*

Bird’s eye view on the agile forest

In my book ‘Scaling agile in organisations’⁷ I started collecting different agile frameworks and ways of working. I created an overview showing different agile frameworks and ways of working on team and engineering level, on product or program level (one-time or indefinite) and on portfolio level. I divided the indefinite block in two parts. I call frameworks that organize collaboration between teams to develop one product a product-targeted framework and frameworks that support autonomous teams as team-targeted. In the next completely revised print, I added on the product and program level *culture-targeted* as an additional block. I see this block with frameworks and ways of working as a reaction to all those failed agile implementations.

Implementing Scrum at team level, often combined with SAFe or LeSS to manage dependencies between teams and deliver one product or service for a customer, is not enough if the culture, the mindset of all involved, is not an agile culture or mindset. If senior management still embraces centralized decision making, if senior management doesn’t believe that incremental delivery for their customers makes sense, if you have agile teams who are not really ready, if there is anxiety to speak up, if there is no trust, then you are probably hitting the wall at full speed and the results will be dramatic. Scrum, SAFe or Less will be the scapegoat and I would say that the end of your business life cycle is getting closer.

To start building a more agile focused mindset you could make use of those culture-targeted agile frameworks or agile ways of working. These are not replacing one-time or indefinite product or team-targeted frameworks but are complementary. In the figure I mention among others AgileSHIFT, Agile Fluency Model, OSA, Brightline Transformation Compass and Flex. I positioned SAFe (starting from version 5.0) partially in this box too. In my (updated) award-winning article⁸ I mention many more.

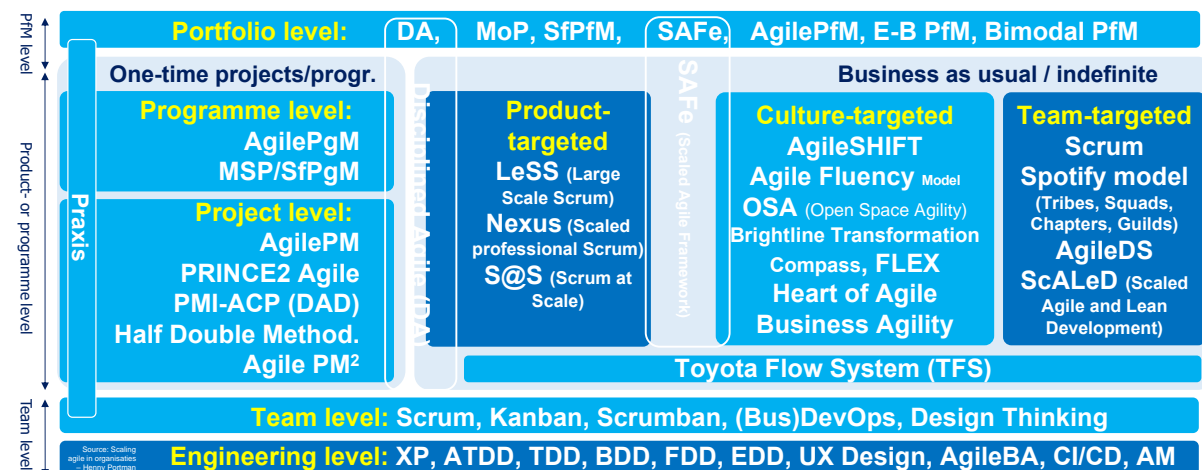


Figure: Bird’s eye view on the agile forest

To give some background behind a few of these culture-targeted frameworks:

⁷ Portman, Henny (2019), *Scaling agile in organisations*, Van Haren Publishing, Zaltbommel

⁸ Portman, H. (2020). A new bird’s eye view on the agile forest; *PM World Journal*, Vol. IX, Issue X, October

- **SAFe**⁹ (as of version 5.0) offers two extra competencies: Continuous Learning Culture (CLC) and Organizational Agility (OA). Continuous Learning Culture is based on three dimensions: Learning Organization (shared vision, systems thinking, mental models, team learning, personal mastery), Relentless Improvement (constant sense of danger, optimize the whole, problem solving culture, reflect at key milestones, fact based improvement), and Innovation Culture (innovative people, time & space, go see, experimentation & feedback, pivot without mercy or guilt, innovation riptides). The three dimensions of Organizational Agility are: Lean-thinking people and agile teams (house of lean, SAFe principles, Agile Manifesto), Lean Business Operations (process time - delay time - process time) and Strategy Agility.
- **Open Space Agility (OSA)**¹⁰, formulated by Daniel Mezick, 2015, is a safe, pragmatic and repeatable technique for getting a rapid and lasting Agile adoption. It works with the approach you are currently using, and OSA can be added at any time. OSA is used to actively engage as many employees as possible in your Agile program.
- **AgileSHIFT**¹¹ (developed by AXELOS) is a framework that prepares people for transformational change by creating a culture of enterprise agility. The AgileSHIFT framework helps organizations to undergo a transformational change, to adopt a ‘survive, compete and thrive’ mindset. It will help to bridge the gap between the current and the target state (the Delta in AgileSHIFT¹²) by embracing a range of agile, structured and hybrid approaches across the organization. The existing severe split between ‘run the business’ and ‘change the business’ will vanish.
- The **Agile Fluency model**¹³, developed by Diana Larsen and James Shore in 2012 and substantially updated in 2018, is a framework to help teams understand their current position and to help them develop an individual road map. Agile teams pass through four distinct zones of fluency as they learn (Focusing teams, Delivering teams, Optimizing teams and Strengthening teams). Diana Larsen defines fluency as things that you do automatically without thinking. Each zone brings specific benefits.
- **Brightline Transformation Compass**¹⁴, a comprehensive system for transformation developed by Behnam Tabrizi, PMI. This approach helps to create the right mindset within your organization needed for a successful agile transformation. It gives you a Compass that is built around 5 critical, mutually reinforcing building blocks for effective transformation (North Star, customer insights & megatrends, the transformation operating system, your volunteer champions, inside-out employee transformation) and a three-step approach for transformation (inspire, mobilize and shift)

⁹ <https://www.scaledagileframework.com>

¹⁰ <https://openspaceagility.com>

¹¹ <https://www.axelos.com/best-practice-solutions/agile-shift>

¹² Portman, Henny (2020), *Exploring the delta in AgileSHIFT White Paper*, AXELOS

¹³ <https://martinfowler.com/articles/agileFluency.html>

¹⁴ <https://www.brightline.org>

- **FLEX**¹⁵, Flow for Enterprise Transformation, developed by Al Shalloway, is designed to be used as a guide for organizations to achieve business agility. It is a platform which lays out the steps required for improving the way a company adds value to its customers, both external and internal. It can be used with other agile frameworks like SAFe, Nexus, LeSS, Disciplined et cetera. FLEX is designed to work at the organization level, regardless of the size of the organization involved or if only part of the organization is involved. FLEX incorporates four shifts in thinking. These are systems-thinking, shifting from frameworks to the work itself, focusing on flow, and attending to organizational development with Lean.

Conclusion

When I look at culture I am looking for the mindset of people: are we solving problems or are we exploring opportunities, are we reactive or proactive, are we anxious or do we trust each other (including management), can we make mistakes (as long as it goes fast, and we don't do it twice) or aren't mistakes allowed, are we a learning organization or only existing to execute? Are we making decisions at the lowest possible level or is decision-making centralized? Usage of one of the culture-targeted frameworks can help to achieve a more agile mindset and could be the missing piece in your agile transition to make it a success.

Sensemaking in the Agile Forest series

This article is part of a series of articles called *Sensemaking in the Agile Forest*. This series¹⁶ consists of the following parts:

- [Portman, H. \(2022\). What is Agile? Sensemaking in the Agile Forest series, PM World Journal, Vol. XI, Issue I, January.](#)
- [Portman, H. \(2022\). What is Scrum? Sensemaking in the Agile Forest, series article 2, PM World Journal, Vol. XI, Issue II, February](#)
- [Portman, H. \(2022\). Is agile always better? Sensemaking in the Agile Forest series, PM World Journal, Vol. XI, Issue III, March](#)
- [Portman, H. \(2022\). The ideal Product Owner, Sensemaking in the Agile Forest series, PM World Journal, Vol. IX, Issue IV, April](#)
- [Portman, H. \(2022\). The Ideal Scrum Master, Sensemaking in the Agile Forest series, PM World Journal, Vol. XI, Issue V, May](#)
- [Portman, H. \(2022\). Is an agile team always autonomous? Sensemaking in the Agile Forest series, PM World Journal, Vol. XI, Issue VI, June](#)
- [Portman, H. \(2022\). What do iterative and incremental mean in Agile? Sensemaking in the Agile Forest series, PM World Journal, Vol. XI, Issue VII, July](#)

¹⁵ <https://portal.netobjectives.com/an-overview-of-flex/>

¹⁶ This series is based on a number of short blogs I made for Forsa Advies, a project management training organization in the Netherlands (<https://www.forsa-advies.nl>).

- [Portman, H. \(2022\). The Minimum Viable Product \(MVP\) unraveled; Sensemaking in the Agile Forest, series article, *PM World Journal*, Vol. XI, Issue VIII, August](#)
- [Portman, H. \(2022\). Prioritizing in an agile team, Sensemaking in the Agile Forest, series article, *PM World Journal*, Vol. XI, Issue IX, September](#)
- [Portman, H. \(2022\). Multitasking, task-switching or monotasking; Sensemaking in the Agile Forest series, *PM World Journal*, Vol. XI, Issue X, October](#)
- [Portman, H. \(2022\). Being predictable as an agile team; Sensemaking in the Agile Forest series, *PM World Journal*, Vol. XI, Issue XI, November](#)
- [Portman, H. \(2022\). Self-managing or self-organizing agile teams, Sensemaking in the Agile Forest series article, *PM World Journal*, Vol. XI, Issue XII, December](#)
- [Portman, H. \(2023\). Slicing user stories, Sensemaking in the Agile Forest series, *PM World Journal*, Vol. VII, Issue I, January](#)
- [Portman, H. \(2023\). Agile management products, Sensemaking in the Agile Forest series article, *PM World Journal*, Vol. VII, Issue II, February](#)
- [Portman, H. \(2023\). Agile and testing, Sensemaking in the Agile Forest, series article, *PM World Journal*, Vol. XII, Issue III, March](#)
- [Portman, H. \(2023\). Kanban in a nutshell, Sensemaking in the Agile Forest series, *PM Journal*, Vol. XII, Issue IV, April](#)
- Culture makes or breaks your agile transformation
- The evolution of agile frameworks

About the Author



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Henny Portman, owner of Portman PM[O] Consultancy and was partner of HWP Consulting, has 40 years of experience in the project management domain. He was the project management office (PMO) thought leader within NN Group and responsible for the introduction and application of the PMO methodologies (portfolio, program, and project management) across Europe and Asia. He trains, coaches, and directs (senior) programme, project and portfolio managers and project sponsors at all levels, and has built several professional (PM(O)) communities.

Henny Portman is/was accredited in a variety of qualifications, including P3O, PRINCE2, MSP, MoP, PRINCE2 Agile, AgilePM, AgilePgM and AgileSHIFT trainer and an SPC4 SAFe consultant and trainer. He is a P3M3 trainer and assessor and PMO Value Ring Certified Consultant (PMO Global Alliance). On behalf of IPMA, he assesses mega and large projects for the IPMA Project Excellence Award. In addition to this, he is an international speaker, author of many articles and books in the PM(O) field, and an active blogger (hennyportman.wordpress.com/).

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