The OpenAgile Primer

Version 1.1

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Introduction

OpenAgile is a method for organizations, teams and individuals to increase productivity and quality, allow innovation and respond to change, increase team spirit and personal engagement, create a culture of continuous improvement, and reduce costs and risks. OpenAgile is also a value delivery system, a learning system and a learning community. The purpose of OpenAgile is to create an environment in which people are free to express their true nature and capacities to contribute to the betterment of their organization. In the OpenAgile Primer, we will briefly explore each of these ideas and how you can use OpenAgile in your own work.

OpenAgile is an approach to doing work that is both practical and principled. Anyone doing work that needs to be organized, effective, and quality conscious can use OpenAgile. OpenAgile enhances the ability of individuals, teams, and organizations to deliver value to their stakeholders by developing human capacity, improving processes, and, most importantly, encouraging rapid and deep learning. We hope that you will find OpenAgile a useful, exciting, and revolutionary approach to working.

In this brief e-book, OpenAgile is presented in an easy to understand, easy to apply format. This e-book is also part of the required reading for the OpenAgile Readiness Certificate test. This is the first level of the OpenAgile Capacity Building Framework. More details about the test and framework are available online at www.openagile.com. We also invite you to participate in the OpenAgile Community at www.openagile.org.

Chapter 1 – A Short Story about OpenAgile

In 2010, a superintendent and his small group of supervisors in a mining company decided to start using OpenAgile. They had all sorts of quality, productivity and teamwork problems. This group had trouble with large amounts of re-work, late projects and arguments between shifts about how to do tasks.

These supervisors were responsible for supporting the smooth running of the mining operations at a particular mine site. They built and maintained roads, dikes and sumps and they managed all the materials needed for the mine infrastructure such as sand and limestone. Individually, they were good at their jobs. They had many problems working together.

Once they started to use OpenAgile, things changed dramatically. The work they were doing became visible and coordinated. They started to learn each other's jobs and skills. They even started to truly enjoy working together. Arguments about who, how and when to do things changed to productive discussions around how they would collectively solve problems and meet the needs of the mine operations.

This small group of individuals became a productive high-performance team. Over just six months of using OpenAgile, they saved themselves around ten million dollars. The broader impact to the organization was over one hundred million dollars. They easily handled emergencies and critical challenges including the sudden death of one team member. They continue to use OpenAgile after eighteen months with every intention to continue indefinitely.

OpenAgile has enabled them to create an environment with efficient execution of their own work, continuous learning and improvement about how to do their work more effectively, and a desire to share their learning with the rest of their organization.

Chapter 2 – The Foundations of OpenAgile

OpenAgile stands on three foundations that are essential to delivering value to stakeholders. The first, Truthfulness, is a basic human capacity. The second, Consultative Decision-Making, is a method for teams to take coherent action based on a unified vision. The third, the "Learning Circle," is a simple and practical model of effective learning. While there is a great deal that can be said about each one of these, we will limit ourselves to a brief exploration here.

Foundation One: Truthfulness

> *"Truthfulness is the foundation of all human virtues"* -
> 'Abdu'l-Bahá

We are all familiar with what the lack of truthful behaviour does to us or our environment. The good news is that truthfulness is a basic human capacity, and everyone can develop their capability to be truthful. Truthfulness has many aspects including transparency and visibility, speaking honestly and being honest with ourselves, harmony of our deeds and words, and seeking the underlying truth in any given situation.
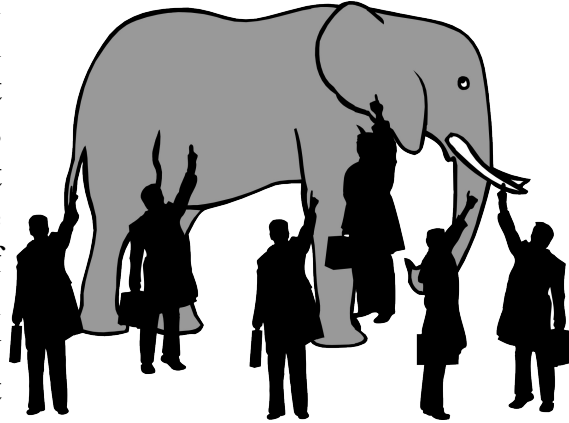
Truthfulness is more than an ethical standard: it implies not lying, stealing, cheating, cutting corners or hiding the truth in any way. In order to develop the capability of truthfulness, individuals must be dedicated to the following:

– expanding their conceptual framework of truthfulness,

– continually deepening their knowledge of truthfulness, and

– developing qualities, skills and habits necessary for conducting their affairs according to the standards of truthfulness.

OpenAgile relies on people developing the capability to be more truthful. Truthfulness is necessary to learn from mistakes, be creative, and to find an effective approach to doing work. Ultimately, truthfulness builds trust and leads to reducing excessive bureaucracy and chaos.

Perception and Prejudice

You may know the story of the six blind men and the elephant. Each blind man is touching a different part of the elephant. One is touching the tusk and thinks that it is a spear. Another is touching the leg and thinks it is a tree trunk. If you tell them that they are all touching the same thing, it is very likely that they will argue about what it is. Unless they are also truthful about their own limitations, it will be difficult for them to come to a unified vision about what they are touching.

The filters we have as we perceive the world are important: they reflect our beliefs and help us sort the world efficiently. However, these filters can also hinder us and become blind spots or prejudices that prevent us from being open to the truth. In an OpenAgile environment, we strive to be open to the way other people perceive the world so that we can learn from them.

Foundation Two: Consultative Decision-Making

> *"We never undertook to do any thing of any importance which was likely to affect each other, without mutual consultation. We were generally a unit, and moved together."* - Frederick Douglass

Consultative decision-making is a method for individuals, teams and organizations to take coherent action based on a unified vision. The process requires that all people involved in making a decision put themselves into a new frame of mind where truthfulness, humility and detachment are uppermost, rather than competition, debate and arguing. This means that after a decision is made, all those involved will fully support the decision, not just giving lip-service, but wholeheartedly acting in accord with the decision.

Rules of Consultative Decision-Making

Consultative decision-making is based on the following simple rules:

- Everyone is encouraged to contribute to the discussion; a diversity of views is welcomed

- No idea is owned by any individual and therefore it is okay to change your own mind

- Offence should never be given nor taken

- Personal attacks are absolutely forbidden; Aggressive interruption is considered bad behaviour

- Everyone should be able to fully express themselves in a frank, amicable, and courteous manner

Unified Action

Consultative decision-making ideally results in unanimous support for a line of action. However, if unanimity is not possible, a majority can carry a decision. In this case, though, once a decision is made, regardless of whether or not you voted for it, you fully support the decision. The reasoning is simple: by fully supporting the decision in unified action, whether or not the decision is correct, through reflection, a better way will become clear. Adjustments can then be made based on collectively learning about better approaches through experience.

Consultative decision-making can be used in all aspects of the OpenAgile process, it requires Truthfulness, and it is an essential component of OpenAgile.

Photo credit: Darin Zandee

Foundation Three: Systematic Learning

> *"Learning is like rowing upstream: not to advance is to drop back."* - Chinese Proverb

Systematic Learning is a necessary component for the effective use of OpenAgile. Learning about people, their skills, processes, and the work results of a team or an organization. In OpenAgile systematic learning is supported through a model called "The Learning Circle".

The Learning Circle is a simple and practical model of effective learning. This model describes learning as a series of four steps for us to follow, four capacities for us to develop, and the pivotal importance of Guidance. The steps are repeated over and over thus giving us the opportunity to get better at learning and to make progress. The Learning Circle model applies to traditional operations and project work as well as primary learning environments such as research and innovation.

The Four Steps

The four steps in the Learning Circle are Reflection, Learning, Planning, and Action, and are followed one after another, over and over. It is possible to begin an endeavour with any of the four steps. The diagram below shows the Learning Circle Model:
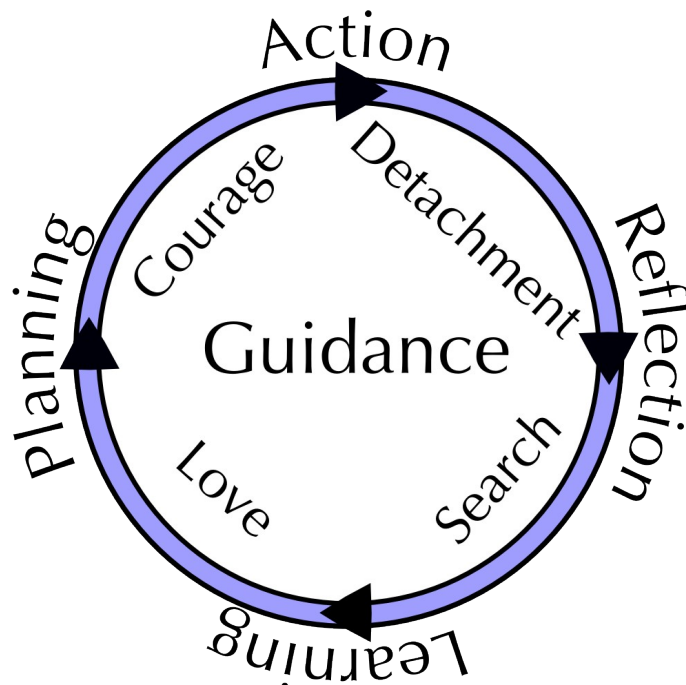
1. **Reflection**

   The Reflection step is a pause in our activities where we gather data, impressions, history, stories, and any other observations about what we have done. In order to do this effectively, we must develop and exercise the capacity for Detachment – detachment from preconceived notions.

2. **Learning**

   In the Learning step we carefully examine the observations made in the Reflection step and "discover" new insights, skills, relationships, structures, failures or any other conceptual changes. We search for the principles involved in our work. In order to do this effectively, we must develop and exercise the capacity of Search – search for the underlying principles.

3. **Planning**

   In the Planning Step we apply the conceptual understandings we have developed. We create a plan of action using the newly discovered principles from our learning step. We should directly reflect in our planning each insight or principle we have learned. In order to do this step effectively, we must develop and exercise the capacity for Love – love for the act of learning.

4. **Action**

   In the Action Step, as an individual, team, or organization we carry out the plans we have created. We do our work. In order to do this effectively, we must have Courage – courage to plunge into the unknown.

The Four Capacities

Each of the four capacities in the Learning Circle are prerequisites for taking the next step. At the same time, as we exercise these capacities through the use of the Learning Circle, we develop these capacities within ourselves, in our teams and in our organizations. Our inner conditions and capabilities have an effect on our environment which in turn then has an effect on us. By going through the Learning Circle, we use and develop these four capacities:

1. **Detachment.** The capacity for Detachment supports the Reflection step. Detachment is openness. Detachment means that we set aside our ego and objectively look at the evidence including facts, events and feelings.

2. **Search.** The capacity for Search supports the Learning step. Search includes consultation, wisdom, discernment, judgement, and search for solutions.

3. **Love.** The capacity for Love supports the Planning step. Love of learning creates openness to Guidance. Love engenders vision, passion, and a sense of purpose.

4. **Courage.** The capacity for Courage supports the Action step. Courage encompasses conscious choice, volition, willingness, and desire to act even in the face of uncertainty.

In the beginning, we may not be strong in these capacities. However, with practice in the Learning Circle, we have the opportunity to grow and become comfortable with the Four Capacities. As they say "practice makes perfect."

Guidance

Central to the effectiveness of the Learning Circle is the concept of Guidance. Guidance is the act of assisting an individual, team, or organization to reach a destination by accompanying, giving directions, or supplying advice. Guidance plays a pivotal role in developing our capacity and can be applied to all four steps and all four capacities. For individuals, teams, and organizations, Guidance is critical to be able to progress in the development of knowledge, skills or capacities. Guidance can come from within – a team member who has expertise can share it with the other team members. And Guidance can come from outside – we can bring experts into the organization, we can read books or web sites. Inspiration can also be thought of as a form of Guidance, for example a team member suddenly has a bright idea. Being open to receiving Guidance ensures that the Learning Circle is both organic and disciplined.

Chapter 3 – The OpenAgile Process

The processes in OpenAgile are designed so that individuals, teams, and organizations can apply the Learning Circle in a systematic manner.
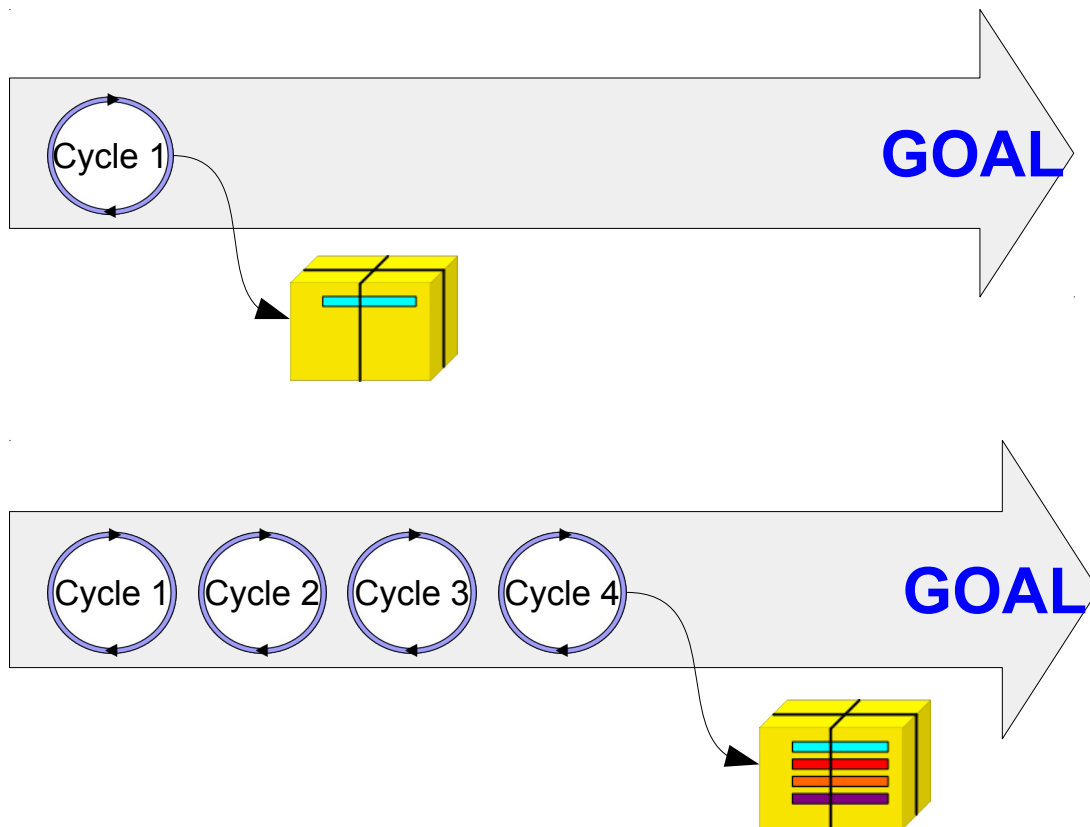
Goals

All work is done for a reason, to achieve a purpose, and to accomplish a goal. OpenAgile is a framework for helping us do this as effectively as possible. Having a goal you are working towards is critical for the process to work effectively.

In OpenAgile, goals can be lofty or practical, simple or complex, short or long term. It is natural for goals to start broad and become more specific as you make progress. Having a goal allows you to track progress, contextualize feedback, and ensure that the work you are doing is valuable.

Work in Cycles

In OpenAgile all work is done in short Cycles of equal length. Every Cycle can be considered a single step along the path to our goal of producing valuable results. Each Cycle of work builds on the value you created in the previous Cycle. There are three rules to doing this effectively. First, apply the Learning Circle without fail, every Cycle. The Learning Circle encourages the systematic evaluation of our assumptions, actions, and outcomes. Second, use Cycles of equal length. This allows us to measure our progress across Cycles. Third, use Cycles that are short relative to the length of your Goal. Short Cycles, ensure that you frequently deliver value to stakeholders, adapt to change, and emphasize continuous improvement. If you have a goal that is one year away, you might choose Cycles that are one month long. If your goal is only one week away, you might choose Cycles that are four hours long.

Cycle Input: Value Drivers

At the outset, we need a measurable activity or focus to help drive our progress towards accomplishing our goals. We call these Value Drivers. When achieved, a Value Driver should result in delivering something of value to your stakeholders. Value is defined as a characteristic deemed desirable by stakeholders that is measured in relation to a goal and verified by achieving the intended results by the end of a Cycle.

A Value Driver is best understood when it is S.M.A.R.T. – specific, measurable, attainable, results-oriented, and time-bound. We cannot predict the future, so it is important to work on the highest priority Value Driver first. The person serving to do Growth Facilitation, which we will discuss in greater detail later, is responsible for collecting and prioritizing the list of Value Drivers.

Traditional Value Delivery

Delivering value every Cycle is not always easy. In some environments, we treat reaching a goal as a whole project in which we plan the project at the start, execute the project and then assess whether we have reached the goal. This is a traditional project management approach, but when we use this approach there is usually no second chance. We make it or we don't. There is no ability to react gracefully to change because of the high cost of rework. In OpenAgile, the use of Cycles is deliberately designed to give us lots of chances to truly assess if we are contributing to the goal.

Organic vs. Mechanical Value Delivery

A great analogy to help explain this concept is to look at mechanical systems and organic systems. A mechanical system like a car doesn't grow. It is assembled. A car is made up of many components that are critical to its function – an engine, tires, steering wheel. But if you are missing the engine, the car has no value as a car. You can't easily manufacture a car in small stages so that even the first stage has essential car-ness. Instead, a car only makes sense at the end when all the pieces are put together.

On the other hand, if you look at a tree, every year right from the time it is a seedling, it retains its essential tree-ness. Moments after the seed has sprouted, you can call it a tree. As it grows, there is no point in time when it is not a functional tree. Even if a branch breaks off, it is still a tree.

Mechanical systems respond poorly to change. Change can even be catastrophic for a mechanical system. However, organic systems are much more adaptive to change. OpenAgile is a means for humans working together to respond to change in a way that is more like an organic system rather than a mechanical system.

Value and the Learning Circle

The parts of the sequence of the Learning Circle after Action, namely, Reflection, Learning and Planning are required to ensure that we are still contributing value. We ensure that our goal is still valid, we are doing things the best way we know how, and we adjust all these things if needed. This may mean that parts of what we have done in the first Cycle get changed immediately, or that new ideas are generated that weren't possible at the start, or even that the goal is changed entirely! This kind of change is only possible if we are fully open to the possibilities revealed through the Learning Circle by using it every single Cycle. The Learning Circle gives us a model that even allows us to change our goal if we discover the need to do so.

Engagement Meeting

We begin every Cycle with an Engagement Meeting. In the Engagement Meeting, we focus on Reflection and Learning followed by Planning. We use Consultative Decision-Making to explore all the items in our list of Value Drivers and decide which of these will be done in the current Cycle. We break down each Value Driver into as many independent tasks as are necessary to satisfy the stakeholder.

The result of this meeting is called a Cycle Plan. The Cycle Plan consists of a number of tasks that we do during the Cycle. We will discuss the Core Types of Tasks in greater detail later.

Timing

The Engagement Meeting is the same length of time every Cycle and it is in proportion to the overall duration of the Cycle. For example, a one-week long Cycle for a business would have an Engagement Meeting that lasts between two and four hours, but really shouldn't be longer than that. If there are forty working hours in the Cycle, then the meeting should be two to four hours long. In other words, less than one tenth the overall Cycle duration. If a Cycle is only one workday long, then the Engagement Meeting should be less than forty-eight minutes long. And if the Cycle is three months long, but it is for a volunteer group working on average ten hours per week, then the Engagement Meeting should be less than twelve hours long (12 weeks x 10 hours/week x 10%).

Keeping the meeting short relative to the overall length of the Cycle helps maintain focus. As we go through this meeting, we should not consider the stages of Reflection, Learning and Planning as strict agenda items. Rather, we start the meeting with a focus on Reflection, but some Learning and Planning may take place right at the start. As we progress through the meeting, the emphasis shifts to Learning, and then shifts finally to Planning. As an example of how this might look, consider that you might have forgotten an important fact about the previous Cycle which you only remember near the end of the Engagement Meeting. Rather than rigidly sticking to just planning, you would be welcome to bring up this recollection since it may be important to making an effective Cycle Plan.

Engagement Meeting Output

The output of the Engagement Meeting is a Cycle Plan. The Cycle Plan consists of a collection of tasks. Tasks can be recorded in any manner that is effective for the environment. For example, if we are a small team working in a common space together, then we might record tasks on note cards and put them on the wall so that everyone can see them. On the other hand, if we are working with people we never see because we are dispersed over a large geographic region, then perhaps using an electronic tool such as a wiki or spreadsheet is more appropriate.

Reflection During the Engagement Meeting

In the Engagement Meeting, we typically start with Reflection. Reflection can include seeing a demonstration of work completed in the prior Cycle. It can include personal time to reflect on how we felt and what we did in the prior Cycle. It can include examining the completed tasks of the Cycle Plan for the prior Cycle. Reflection during the Engagement Meeting typically lasts between ¼ and ½ of the overall time of the Engagement Meeting. However, there is no strict rule about how much time we should spend on Reflection.

Learning During the Engagement Meeting

As we are Reflecting on our prior Cycle, we will notice things that are deeper than just what happened – the things we have learned. Learning typically follows Reflection, but there can be some overlap: some of us are still Reflecting, and others of us are realizing what we have learned. We should take care to clearly identify what we have learned so that everyone involved can appreciate our collective and individual capacity building. Moreover, we pause to ensure that we use what we have learned to make our Cycle Plan as effective as possible. A simple example of this is that someone on the team learns that a Value Driver is no longer needed. This learning is then reflected in the list of Value Drivers by removing that particular Value Driver. Like Reflection, Learning in the Engagement Meeting typically takes between ¼ and ½ of the time.

Cycle Plan

The last part of the Engagement Meeting is Planning, or the act of creating the Cycle Plan. The Cycle Plan is simply a collection of all the tasks we intend to do during the Cycle in order to deliver value. We ask questions and discuss what is required to complete each Value Driver, and we deliberately use our Reflections and Learnings to shape our understanding of the intended outcomes. A Cycle Plan should be tempered with a truthful assessment of our capacity to complete the tasks. Consultative Decision-Making is used to create the Cycle Plan.

A Note About Perfection

The Cycle Plan is not intended to be perfect. We don't have to follow it rigidly, which in most types of work would lead to disaster. The Cycle Plan is meant to be flexible. One of the key ways in which it is flexible is that we do not decide who will do what task at the start of the Cycle. Instead, we decide as we go. As the team works, tasks are completed, modified, new ones are added to the Cycle Plan, shared, or deleted.

Generating Tasks

In the Engagement Meeting, everyone participating in the work of the Cycle needs to actively participate in generating tasks. This creates collective ownership of the Cycle Plan. Generating tasks can be done in a discussion format or with people working individually and then coming together at the end of the meeting.

Generally, any item in the list of Value Drivers can become many tasks. For example, if one of the Value Drivers is to have a meeting with a potential client, then this single item might result in three tasks: confirm the meeting, prepare the agenda, and then hold the actual meeting. The way Value Drivers become tasks is entirely up to the people involved in doing the work. People who will not be working during the Cycle do not have a say in defining the tasks in the Cycle Plan.

One Value Driver becomes many Tasks.
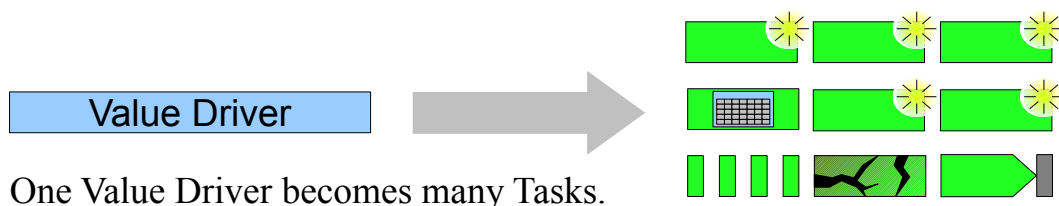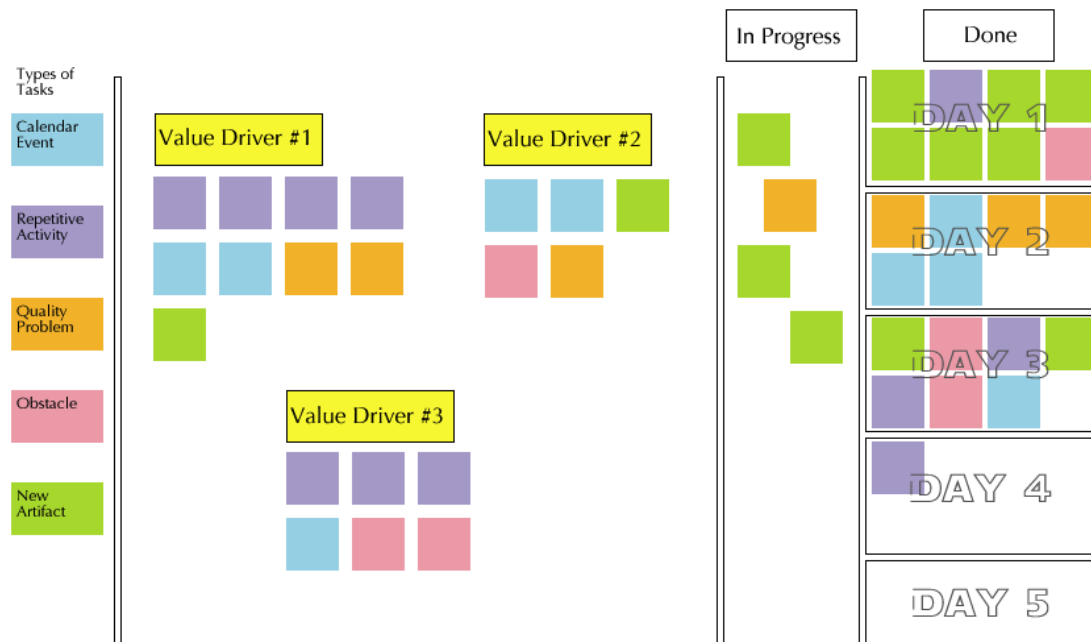
A Cycle Plan with colour-coded Value Drivers and Tasks.

A Positive Attitude

A little detour to look at one of the principles of working in OpenAgile is appropriate here; we need to maintain a very positive outlook and inner condition. Tests and trials occur in all parts of our life, and maintaining a positive attitude is not always possible. However, we still strive to remain positive and seek opportunities to grow from all the challenges we encounter. This is not to say that we ignore problems. Rather, we accept that our inner condition can influence our environment, just like our environment can influence our inner condition. If we are happy, we express that happiness in many small ways that help the people around us to become happy. If we are content and calm, that inner feeling gets expressed in how we respond to others which in turn helps them to be content and calm. Similarly, if our environment is beautiful – if the words we hear, the music we listen to, and the things we read are positive, we are more likely to feel positive ourselves. Creating an positive inner condition is something that helps us use OpenAgile effectively.

In order to set the right tone for the Engagement Meeting, it is strongly encouraged that those people involved in the Cycle take a short amount of time to "check in" before beginning the work. This can be done as a group or individually and is intended to transition the group into a stronger sense of presence and connection to the work at hand. Try reading or reciting meaningful passages from uplifting sources to help orient your thoughts on the principles and attitudes needed. For example,