



Personal
Agility

GUIDE TO **PERSONAL AGILITY**

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Peter Stevens



Maria Matarelli

Guide to Personal Agility

Peter Stevens and Maria Matarelli are Agile trainers and coaches that help people and businesses discover better ways to work. They are sharing how Personal Agility can help people do more of what matters.

WHAT DO PEOPLE SAY ABOUT PERSONAL AGILITY?

“It gives me a good framework in context to have a meaningful conversation with my wife about actual things that we need to get done.”
– Rijon Erickson

“It also gave me a wider time horizon, what I need to do today, next week, what I accomplished last week, I'll give myself a pat on the back.”
– George Verdolaga

“Now I know what is most important for me and what I have to do first, and this is the best thing I have learned from this program, to set my clear priorities” – Piyali Karmakar

“Now I feel much more focused on what is really important and what makes my life happier.”
– Laura Quattri

“Personal Agility has given me the ability to focus inwards, you know, to try to understand what is important for me, what will make the impact for me, what will make me happy.” – Surajit Das

“Because it gave me more focus on and helped me understand better the difference between the importance and the urgency.”
– Thomas Bindzus

OVERVIEW

Personal Agility is a simple framework for people who want to do more that matters and have more impact through their actions. This white paper explains how to use Personal Agility to achieve your goals.

Today, almost everybody has more things to do than time to do them. Highly creative people have almost by definition more ideas than time to execute them. In either case, deciding what to do and what not to do is the key to doing things that matter.

Personal Agility is designed to enable you to reflect on your goals and intentions at regular intervals so you can ensure that you are doing the right things first and you can stop working when additional work brings no further benefit.

We believe Personal Agility can help anybody do more that matters and have more impact.

In a business context, Personal Agility can enable managers and their staff to achieve high alignment and transparency about goals, forecasts and milestones achieved. In a personal context, spouses and partners can coach each other to set and achieve objectives together. And as a coach, you can use Personal Agility to enable your clients to identify and work toward their important goals in life and work.

“Agile” is a set of values and principles often associated with highly effective software development teams, and Scrum is a leading Agile framework. By simplifying processes, you can deliver value in a shorter time period while inspecting and adapting to improve along the way.

Personal Agility applies these agile concepts beyond the workplace. Personal Agility helps people identify what matters most in their lives and ensure that their actions align. Personal Agility takes its name because it is based on the same values, principles and patterns as Scrum and Agile software development, but recognizes that organizing your life is a different challenge than creating products as a team.

HOW PERSONAL AGILITY CAME INTO EXISTENCE

Peter Stevens was initially inspired by an article “Critical Things Ridiculously Successful People Do Every Day”, by Travis Bradberry, in which the author suggested that such people manage the minutes, not hours. Peter decided that he wanted to be such an individual, but quickly realized that if managing the minutes is key, then such people must lead much more predictable lives than he did. Peter said “My life is not that predictable. So I set out to create something that balances focus with flexibility.”

Peter tested Personal Agility for 12 weeks. His wife Sabine served as his Celebration Coach for most of that time. They were amazed at how they both got much better at getting important things done. They understood each other much better and had fewer unpleasant surprises. The weekly discussions on what's important helped them synchronize and focus on activities beyond the urgent tasks of daily life. Over a year later, they still do it — with a smile! — and really miss it if they can't.

Maria Matarelli has always been a high performer, but she found that she sometimes moved too fast without enough rest, pushing forward endlessly, sacrificing health and wellbeing. When Maria and Peter began talking about the concept of Personal Agility and the benefits that Peter had empirically discovered, Peter asked Maria the simple, yet powerful question “What really matters in your life?” Time seemingly stood still as Maria realized exactly how powerful this question was and began to refocus the lense through which she looked at the things that she did.

Peter and Maria began working together to spread the concept of Personal Agility, presenting at conferences in Singapore, India, Thailand, Austria, Zurich, and throughout the U.S. The response to follow was overwhelmingly positive from people around the world as the use of Personal Agility continued to grow. Upon further discovery, Maria and Peter realized that the foundations of Personal Agility and the 3 Pillars of Personal Impact can be applied as a leadership model and help create alignment in organizations. Peter and Maria are building a community of practitioners while leading workshops and coaching sessions to help people refocus on what really matters and begin to enjoy life more.

WHY PERSONAL AGILITY?

It takes just as much time to flip a quarter as to flip a penny, but the quarter is more valuable. So where should you invest your time? On the quarters, i.e. on the things that bring value to you.

Sometimes resting or “chilling” is the right thing to do, and that's OK too. Personal Agility doesn't try to tell you what's important; it just helps you to recognize what's important to you, so you can do the right thing.

Personal Agility enables you ask and find answers to the key questions that enable you to make better use of your time:

- What is important?
- What is urgent?
- What do I want to accomplish?
- What am I going to do today?

Personal Agility is defined through a small number of roles, tools and events. Each of them exist to help you ask and answer these questions, and ensure that your answers are still the right answers as you and your situation evolve over time.

Personal Agility has no hard rules to follow. Personal Agility consists of a few agreements to make with yourself and maybe one other person, so that you ask yourself important questions at regular intervals. If you miss a week, it's not the end of the world. If you find that certain aspects don't bring you value, it's OK not to do them.

Personal Agility is like a gravitational force – it exerts gentle, attractive guidance that always pulls you back to doing the right thing.

LIFE IS THE OCEAN METAPHOR

Imagine you're a boat on the ocean. Where is the boat? Well, that's kind of hard to tell. You need some tools for navigation.

Where is the boat headed? That depends. If the boat has no captain, no drive and no rudder, then the boat will be taken somewhere by the wind and the waves and the currents. A GPS can tell you where you are and, based on where you've been, can predict where you're headed. It can't tell you where you should go nor guarantee that you will get there.

What will happen to the boat? The course can change with every change in the weather. The winds can blow the boat aground and the waves and storms could tear the boat apart. Without drive and course, that boat could spend a long time in a storm.

How do you get to a destination? You need a captain who wants to get there. You need drive to keep the boat moving and a rudder to keep the boat on course. A GPS can tell you where you are, confirm that you are on course and suggest course corrections if you get blown off course.

Imagine your life is a boat on the ocean and you are the captain of the boat. The winds and waves and currents represent the forces on your life. Without drive, a destination, and the ability to know where you are and where you are going, how can you set a course to a destination.

Who you are is a reflection of what you do. The decisions you make about what to do reflect what really matters to you. They also reveal your course (or lack of one). If what you do isn't helping you become the person you want to be or accomplish what you want to accomplish, then something that really matters isn't getting enough attention.

By adjusting your priorities, by doing things that matter, you can change your course to become the person you want to be and accomplish the things that are important to you.

HOW DOES PERSONAL AGILITY WORK?

In a nutshell:

- You set aside time for yourself, or meet your coach or your manager once per week to review the last week and set goals for the upcoming week.
- You celebrate what you accomplished, even if it is different from what you planned.
- You discuss what's important, what's urgent, and what you want to accomplish this week.
- You decide what order you want to do things in.
- You visualize your goals and tasks with a Priorities Map.
- You may reserve time for important, but non-urgent goals.
- You set a key goal each morning for your day.

You may use a task board such as Trello to visualize your Priorities Map and calendar to plan the things that need coordination with other people.

Personal Agility is not about contemplating your navel or answering the deeper questions of life. Nor is the purpose to “spin the hamster wheel faster.” Personal Agility will help you figure out what really matters in the sense of what drives your actions.

Once you have figured out what really matters or where you want to go, Personal Agility will help you get there.

CORE PRINCIPLES

Personal Agility was inspired by core Scrum principles:

- Inspect and adapt at regular intervals
- Produce something of value at regular intervals
- A team solves the whole problem
- One voice is responsible for answering the question 'Why?'
- A coach helps everyone get better

Personal Agility is at its heart a coaching framework, inspired by the concept of Powerful Questions.

The events in Personal Agility represent opportunities to ask yourself powerful questions to help you recognize and focus on doing the things that really matter to you. Your answers may encourage other, deeper questions.

“What really matters” is that something of value. How you answer that question depends on your context, but once you have it figured out, what really matters provides context for answering the other questions.

The roles reflect the key activities of doing work, prioritizing work, and asking questions about the work and the priorities. These roles suggest patterns for collaboration with others including family, friends, customers, managers and stakeholders.

The tools of Personal Agility enable you to understand your priorities, past, present and future, and manage and plan your activities. Their purpose is to make it easy to figure out what to do next.

THE 6 POWERFUL QUESTIONS OF PERSONAL AGILITY

A Powerful Question invites you to think, so at the heart of Personal Agility is the core collection of powerful questions. These core questions help you figure out and focus on what really matters. There are a total of 6 questions, 5 to ask yourself routinely and one to get you unstuck:

1. What really matters? -- Provides context for answering the other questions.
2. What did I get done this week? -- Celebrate it and feel good about yourself!
3. What could I do? -- Keep your to-do's in a place you will see them.
4. Of those things, what is important and what is urgent? — Triage!
5. Of the urgent and important things, what do I want to do this week? -- Take only as much as you can complete.
6. Who can help? -- This question and the answer can both help you get unstuck.

ROLES

Personal Agility defines three roles, “Me, Myself and I.” Think of them as your Personal Product Owner, your personal Team, and your personal “Celebration Coach.” How these roles are assigned depends on your context. Optimally, you will take on two of the three roles and get help from another person for about one hour per week for the third.

Me, Myself and I

“Me! Me! Me! It's all about me!” — My inner Product Owner

“I do all the work Myself!” — My inner Team

“I often have to remind Me to be nice to Myself!” — My inner Coach

If you are not employed or under contract, then you are an independent, thinking agent. You are responsible for your own life. You get to set your own priorities and do your own work.

Even if you are employed or under contract, you are still an independent, thinking agent, and you are still responsible for your own life! You still do your own work, but you might not get to set your own priorities, especially at work.

None of this prevents you from asking others for help, working with others, or even working with a team in a larger context. It just says, “it's your life, you are responsible for it, and you get to decide.”

“Me” — Your Inner Product Owner

Me's job is to answer the question “What really matters?”

“Me” has an answer for the question why should you do this (and not that)?

What if you do not have control over your priorities? For instance, if you are working in a company and you have a manager, this person may have control over your priorities and your time (hopefully just at work!). The events are the same, except that you take on the role of Celebration Coach and meet with your manager (your “Personal Product Owner”) to ensure that you understand what really matters, review what you have accomplished, discuss what is important, what is urgent, and what you need to accomplish this week.

Myself — Your Inner Team

You are always yourself. You do the work of your life. Henry Ford said, “Whether you think you can or think you can't — you're right.”

“I” — Your Inner Celebration Coach

What does a personal coach do? A coach helps you unlock the potential in you. The assumption is that you know or can figure out how to solve your problems, but may need help identifying the problem or the best course of action, so a good coach asks you the right questions.

The main duty of your Celebration Coach is to ask the key, “powerful” questions at the weekly Celebrate and Choose event: What have you accomplished? (High Five!) What is important? What is urgent?

So your Celebration Coach will meet with you once per week to review what you have accomplished, discuss what is important, what is urgent, what really matters, and given all that, what you want to accomplish next.

TOOLS

A tool is something created to help you achieve a particular purpose. In this case, the tools serve to help you achieve your goals. The tools of Personal Agility help you answer three essential questions:

- What is important?
- What am I going to work on?
- What have I accomplished?

Priorities Map

You manage priorities through a form of a story map. The columns correspond to the different levels of importance, and the cards in the columns to individual goals or tasks. Your Priorities Map includes at least these 6 columns:

- What really matters?
- What could I do/What is important?
- What is urgent?
- What do I want to do this week?
- What did I get done this week?
- What have I gotten done previously?

The “What really matters?” column shouldn't change very often (once you've gotten it figured out) and shouldn't have any more than three or four entries. If too many things matter, then nothing matters. Sort this column by importance (to you). Each entry in this column is color coded, so you can associate individual items with something that really matters.

The columns “What could I do?” and “What is urgent?” enable you to perform triage on the many things you could do and decide which ones you want to accomplish this week.

Each thing you could do becomes a card. Color code each card to tie it to something in the “What really matters?” column. Sort the cards by importance, which is also the order you want to get these items done.

At the weekly Celebrate and Choose, move cards from important or urgent into “Do this week”. Sort the cards in the order you want to do them.

Focus on getting one card done before moving on to the next card. Always start with the top most card. As your goals are accomplished, move the corresponding card into “Done this week”. This makes it easier to review them at the end of the week. After the celebration, move them to “Done in previous weeks”, so that they are out of the way.

What if a goal can't be accomplished in a week?

Here are two possible approaches: One is to make cards for smaller goals that can be accomplished in a week. The other is to create a checklist for the steps along the way, checking them off as you go along. Both approaches have their merits and disadvantages. It's your Personal Agility! Experiment and pick the approach that works best for you in your situation.

What happens if something pops up during the week that I have to do?

Make a card for it. Put it on the Priorities Map in “What could I do”. If you want or need to do it right away, ask yourself why. If the answer is convincing, put it on “Do this week” in the right place in line. Then go back to work on the topmost card (which may or may not be the new card).

Forces Map and Breadcrumb Trail

The Forces Map can be used to organize and prioritize to-do's according to what really matters. If you have many things to do for multiple priorities in your life, then it may be helpful to have a to-do list for each major force in your life.

Sometimes the best way to understand where you are going is to see where you have been. Organizing your done items by week or by month enables you to see what has actually mattered to you in the past.

This is called the Breadcrumb Trail. It offers a hint at what really mattered in your life in the past. If what mattered does not agree with what actually matters, then choose to do different things moving forward to get on course.

Your Calendar

Your time is limited, so how much you can do is limited as well. Time-critical, “urgent” things tend to push out other important things, so scheduling time to work on important goals can be very helpful. A calendar can also remind you of upcoming deadlines so that you can get important things on your radar before they become urgent (or overdue).

An alternative to reserving time is to strictly sequence your “Do this week” column. What to do first, what to do second, what to do third.... Do things in that order.

You are the master of your calendar, not the other way around. You put things in your calendar to help you do the right things. But if your needs change, that’s OK, change your calendar!

If your schedule is too full, especially with immovable appointments, you become inflexible and have no time to do actual work. So in general, important tasks should only be scheduled during the current week, and known, urgent tasks should be scheduled only a day or two in advance. Obviously if you are scheduling time with someone, you may need to schedule it further in advance, but be aware of the dangers of an overfull calendar!

Checklists

How do you know something is really done? In Personal Agility, you usually only have to answer to yourself or your Inner Product Owner, so a checklist is probably sufficient.

A task board such as Trello can help to manage your tasks. On your Priorities Map, you may want to consider including an additional column: Templates. This contains cards for complicated tasks that you may do repeatedly. Each time you need one of these cards, you can copy it into the possibilities column. This gets you the complete checklist as well, so it is easier to complete the tasks correctly.

Personal Agility does not define a “Product Increment,” though if the metaphor is useful to you, you can of course use it. For example, a startup CEO might say “We want to become a viable business. At the end of each iteration, our company should be closer to being a viable business.”

In Personal Agility, the idea is simpler. Each week should support what really matters to bring you closer to your goals or to whom you want to be.

EVENTS

Week

The basic rhythm in Personal Agility is a calendar week. Once per week, you set aside time for yourself, get together with your Celebration Coach or your Personal Product Owner to review your priorities, celebrate what you have accomplished, identify what is important or urgent, and choose what you want to accomplish in the upcoming week.

Weekly Celebrate and Choose Event

Each week starts with the Celebrate and Choose (“C&C”) event. This is similar to having weekly review and planning ceremonies. You can do this on any day of the week, though earlier in the week often feels more natural. The agenda always addresses the 6 questions of Personal Agility:

- Celebrate: What have I accomplished since the last C&C event?
- What really matters?
- What could I do this week?
- Choose: Of those things, what is important and what is urgent?
- Choose: Of those things that are important or urgent, what would I like to accomplish this week?

Celebrate means give yourself a high-five or a pat on the back for what you accomplished!

What happens if something popped up during the week that I had to do?

If you haven't made a card for it, now would be a good time. Put it on the Priorities Map, straight into done! Celebrate it with the others. If you think it blew you off course adjust your course next week so that you get back on track. Or maybe you need to set a new course, which means adjusting what really matters.

What is the difference between important and urgent?

Important means, if you do something, then something desirable will happen, but there is no immediate deadline or consequence if it is not completed. For example, getting your book written is important, but nothing bad will happen to you if you don't write a chapter this week. But if you never write your book, then you won't accrue the benefits.

Urgent means if you don't do it soon, something undesirable will happen. The immediate deadline means that if something is not done quickly, that bad thing will happen soon. For instance, if you don't make a credit card payment on time, you may incur a penalty or worse.

A common problem is having so much urgent work to do that there is no time to do important work. Recognizing this, reducing urgent work, sequencing your work, getting one thing done before starting the next, and possibly blocking time for important work can all contribute to achieving long-term objectives.

After reviewing what is urgent and what is important, choose tasks and goals that will best bring you forward and choose things that you think you can accomplish in the course of the week. Reserve time during the week in your calendar for important and/or time-consuming activities that are not urgent.

Daily Celebrate and Choose Event

One key cause of procrastination is having too much to do. Where are you going to start? At the beginning of each day, ask yourself three questions:

- Celebrate: What did you get done yesterday?
- Choose: What is the most important thing to get done today?
- Unblock: If that is difficult, who could help?

The first question is to help your morale. The second question is to help you decide where to start. And the third question is to help you get unstuck (if it's needed).

You can sign up to have an email sent to you every day with the Celebrate and Choose questions at www.myPersonalAgility.org/freetools

Start every day with the daily Celebrate and Choose questions. Even if all you do is look at the email and answer the questions in your head, it can help you focus.

THREE PILLARS OF PERSONAL IMPACT

Personal Agility helps you recognize where you are and where you are going.

Pillar 1: Capability: Get things done

The ability to get things done is the first essential skill. If you are all talk and no action, who will pay attention to you? Who will trust you when you make a commitment if you don't do what you say you will do? At the basic level, getting things done is about being able keep track of and check off items on your to-do list. Beyond that, mastering tools and skills can make you dramatically more effective. If you need to send a slightly personalized email to 30 people, would you send 30 individual emails, or would you use the mail-merge feature of your mail program?

Pillar 2: Prioritize: Get the right things done

You could do many things. Some of them matter and some of them don't. On the one hand, you need to be able to prioritize so you can choose the ones that matter. But to prioritize, you need to have some criteria for prioritizing. Why is this task more important than that task? The answer to "Why" is what really matters. In order to prioritize, you need to know — or be able to figure out! — what really matters.

Pillar 3: Create Alignment: Listen!

If you and someone else agree on what really matters, your decisions will strive to achieve the same goals. You are pulling in the same direction. You are aligned! The key to alignment is asking the right questions and listening. How often do you just wait for your turn to speak without really listening to what others have to say? When was the last time you asked a powerful question to understand what really matters to your manager, your department or your spouse? It is so easy for people who want 98% of the same thing to get lost in arguments about the remaining 2%!

We all have too much to do. Sooner or later, we run out of time. Sooner or later, we need food or sleep. Some things just won't get done. The question is not will you say no, but when will you say no, why will you say no, and how will you say no. And of course, will your stakeholders — those around you in positions of influence or authority — support your decision? If your decisions are aligned then they will, because the same things matter to them, so their conclusions will be aligned with yours!

The foundation of impact is trust. If you are good at getting things done, if you understand what's important and can therefore make the right decisions, you create a context where people can trust you. The more they trust you, the more they will be willing to follow your lead and forgive your mistakes and shortcomings.

Alignment with Stakeholders

How can you justify a decision to your stakeholders? How do you know that you are doing the right thing at work? How do you know that you are doing the right things for your customers? The key is creating alignment between you and the people you need to satisfy.

If two people can agree on what really matters, then their actions and decisions will strive to achieve the same purpose. These two people are aligned.

As an employee, you can create alignment with your manager simply by holding a weekly Celebrate and Choose event. For your manager, this is called a “regular one-on-one meeting”. You review your accomplishments of the previous period, ensure you are in sync on what really matters, then choose the desired activities for the upcoming week.

Stakeholder Canvas

At the beginning of an assignment, people might not be clear on what really matters. While the many possible ways of establishing alignment around a common shared vision are beyond the scope of this paper, the powerful questions of the Personal Agility Stakeholder Canvas have proven to be an excellent starting point for figuring out what really matters to your stakeholders:

Introduction:

“As you know, we are working to do <<whatever it is you are doing>>. Beyond that, my goal is to create an effective partnership between us, so that we can work together effectively with minimal friction. I want to focus on doing great things for you and your customers. To that end, I would like to understand you, your goals and your perspective.”

Who?

1. Stakeholder - Note and if necessary confirm the person's «Stakeholder»
2. Main Goals or Objectives - What do you want to achieve through this project or collaboration?

Why?

3. Challenges and Impediments - What are the main challenges to achieving your goals or desired outcome?
4. Risks, Concerns, Fears – What concerns do you have about achieving your goals?
5. Frustrations - What causes you to bang your head against the wall?

Outcomes

6. Definition of Awesome - If I could snap my fingers, and all your wishes came true on this project, what would that look like?
7. Support - How can I/we support you to make this come true?
8. What really matters? - When push comes to shove, what is most essential? (Sometimes you might not ask this actual question directly, but rather summarize yourself).
9. What's next? - What is the next thing that you need to do for this stakeholder (follow-up)?

You can download a printable Stakeholders Canvas at.. www.myPersonalAgility.org/freetools

HOW TO START WITH PERSONAL AGILITY

Getting started is easy:

- Agree with yourself to try Personal Agility for a month.
- Ask yourself, why are you doing Personal Agility? What change in yourself do you want to achieve? Write your goals down and stick them on the wall or on the fridge – someplace you will see it!
- If possible, agree with someone to be your Celebration Coach or Personal Product Owner to try it for a month. (If you can't find someone, you can do it yourself, but having a second person involved makes it easier!) If you are doing this at work, your Personal Product Owner is probably your manager and the Celebrate and Choose event is called a “weekly one-on-one”.
- Pick a time for your weekly Celebrate and Choose. You'll need an hour (maybe 2 hours for the first one). It should be the same day and same time every week, preferably at the beginning of the day.
- Create your Priorities Map with the six columns. (You can use an electronic task board like Trello for this). Start entering goals and tasks in the “What could I do” column.
- Meet up with your Celebration Coach weekly to Celebrate and Choose.
- Review and update your Priorities Map frequently.



**Join our early adopters club for
chapters, updates, free tools, community and more!**
www.MyPersonalAgility.org/freetools