SHARED LEADERSHIP

Maximize Organizational Potential By Sharing Authority & Lean Management

Shared Leadership is a lean Framework based on Open Kanban. Its focus is on organizational leadership and synchronizing teams to maximize potential of any organization and stay ahead of competition.

Shared Leadership

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Table of Content

1. INTRODUCTION

Shared Leadership has many definitions that describe the same thing. The definition in Wikipedia (http://en.wikipedia.org/wiki/Shared_leadership) states: team leadership by more than only the appointed leader.

In our document we consider leadership on the organization level. In this context specialists take over leadership roles in their business and technical areas.

In this context Shared Leadership is a lean management framework. It extends Open Kanban and focus on portfolio products /services, sales and delivery.

1.1 What is Shared Leadership?

Shared Leadership is a light weight framework. The author is Walid Farag at ValueCourse (http://valuecourse.net). Its license is governed by creative commons license. You can use it as you like. Please give credit to Walid Farag.

Shared Leadership framework is based on and extends Open Kanban (https://github.com/agilelion/Open-Kanban). Open Kanban is an ultra-light lean framework contributed by Joseph Hurtado and Annita Yegorova Hurtado at AgileLion institute (http://agilelion.com/). Many thanks to both of them.

Shared leadership can be defined by simple characteristics:

- A systematic approach of finding and developing organizational leaders.
- These leaders take care of important areas, products and/or services.
- They lead and develop cross-functional teams.
- Every team focuses on a small or a big part of the organization portfolio.

Shared Leadership might be applied by organizations of different types and sizes to:

- Find out and use its real human and leadership potential.
- Develop, integrate, sell and deliver portfolio components.
- Synchronize different organizational teams (Sales, Delivery and external partners).

1.2 Why is Shared Leadership essential?

1.2.1 Market Changes

In the past it was easy to plan sales and revenue for a complete year. With globalization customers search for best offering worldwide. Your next competitor could be in any place on earth. Differentiation and best positioning is the only way to retain existing and win new customers.

Shared Leadership is a model that helps organizations find and use their real potential. Shared Leadership is a contribution aiming at building an adaptive organization.

1.2.2 Problem with Classic Delegation

Usually line managers are busy with not only administrative but also with tasks that add value to the business and all that benefit from this business (customers, users…etc.).

The busy line manager delegates his tasks to subordinates, when s/he is busy. This is absolutely a good practice. The only risk with this is that the manager decides him-/herself on what will be delegated, to whom and when.

This could lead sometimes to bottlenecks and delays in the process. Eventually the tasks will not be assigned to the best possible team member. So the performance and quality of results is questionable.

1.2.3 Why is Classic Delegation painful?

In the real world this approach is problematic.

First, the real organizational potential in terms of existing leaders with non-manager status is not used at its maximum. This is because ideas and views are limited to the capacity of managers.

Second, the non-managers might not find a chance to show and use their potential. This usually leads to virtual or real resignations.

Third, even when different organizational teams have the good will to collaborate, it is often difficult to work in sync. This often leads to internal conflicts and in worst cases to unsatisfied customers and employees.

1.2.4 Potential of Shared Leadership

Shared Leadership lean framework recognizes these problems and offers an opportunity to:

- Remove or at least minimize Bottlenecks.
- Enrich the organization opportunities with many new and good ideas.
- Offer a complete view (different standpoints are considered and integrated).
- Lead the organization in a holistic way.

2 COMPONENTS OF SHARED LEADERSHIP

2.1 Values

Shared Leadership builds on the Open Kanban (https://github.com/agilelion/Open-Kanban) Values. Please refer to Appendix A for more information. Following are the Shared Leadership extensions to Open Kanban:

Team Spirit

Shared Leadership is about leading the organization especially when facing great challenges and taking risks. Team spirit is essential for any success.

The following are some characteristics of a functioning team.

- Shared team purpose.
- Shared team success.
- Team solidarity.
- No egoism or selfishness.
- No jealousy.

2.2 Practices

Shared Leadership builds on Open Kanban practices. Please refer to Appendix A for more information. Following are the Shared Leadership extensions to Open Kanban:

### 2.2.1 Deliver with cross-functional teams

Shared Leadership assumes cross-functional teams that sell and deliver end products/services. Sales, delivery, support, recruiting and procurement teams are working in Cadence. Members of these organization units are represented in the teams responsible for end products/services.

Shared Leadership assumes that cross-functional teams are essential for the success.

2.2.2 Incremental Delivery

Shared Leadership framework aims at reaching goals as soon as possible. The cross-functional team decides on the minimum viable product release that can be delivered. Further releases are delivered later incrementally. User/Customer can evaluate and give feedback early. The whole organization can learn and adapt from this feedback.
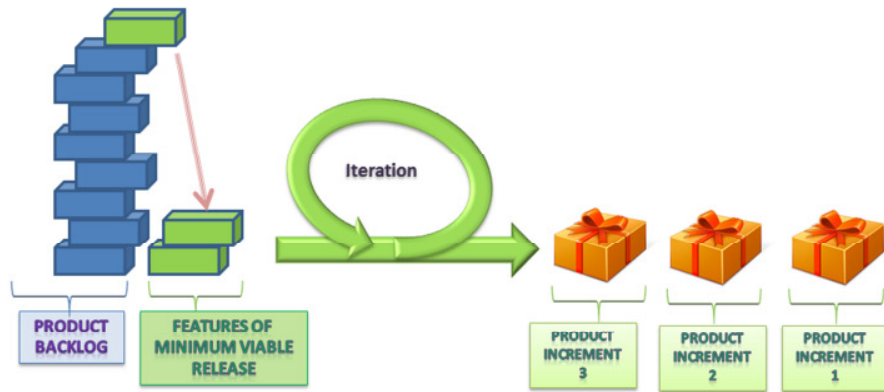
2.2.3 Recognize Success

Success is the best motivator. Use every chance to recognize success. Success should also be recognized on team basis. Please avoid recognition on individual basis. This destroys the team spirit and solidarity.

2.3 Shared Leadership Model

Shared Leadership has a simple model. Leaders or specialists take care of part of the portfolio. Leaders work close to sales and support functions. Line managers act like enablers. They enable the whole process to work and keep track of results.

2.3.1 Three Tracks

Shared Leadership model is simple to understand. It consists of three tracks that should work in parallel:

- Finding and recognizing leaders.
- Leaders take care of developing and delivering the portfolio products/services.
- Leaders work very close to sales and customer facing units.

2.3.2 Portfolio Building Blocks

An organization is a complex system of interconnected parts and has a portfolio of products and services.

Shared Leadership recognizes the fact that not all activities in the organization are delivered standalone to the customer/user. Rather end products/services are delivered. These end products/services consist of building blocks, smaller components or hierarchy of them and so on.

The same way teams can be organized around products/services and their building blocks. For every team a leader or more is defined.

An example of such a model in the case of software product organization:

- End product (traffic information portal)
- Components (map server, direction planning service, portal framework…etc.)
- Business background and technical competences (Geographic Information Systems, Design, Testing, User Interface/Experience…etc.)

2.3.3 Cross-Functional Teams

Shared Leadership builds on the idea of the matrix organization.

Teams responsible for end products/services should be cross-functional. Team members from different business units such as sales, delivery, procurement and recruiting should be part of the team.

This way all points of views and competences are available. This should support success of the product/service.

Moreover the team members act like an active interface between their areas and other areas. This should result in transparence and cadence between all areas of the organization. This model could also work with partner network of the organization.

2.3.4 Role of designated Leaders:

Leadership role is explicit role. A manager can be a leader, when possible. A leader must not necessarily have line manager status.

The leader acts like a coordinator. He takes care of his product/service, the delivery, the knowhow of his team and finding solutions for existing problems.

Since leadership is shared among the team, the leader is the first but <u>not</u> the single point of contact to customers and sales.

Leaders should have passion for what they are doing. They must be able to communicate with all personalities. They should also know whom to avoid or ignore.

2.3.5 Role of Line Management

Line management plays a vital role in Shared Leadership framework. The goal is to orchestrate activities, synchronize them with short and midterm targets and goals. Line management must be involved in order to avoid losing control on the whole process.

Shared Leadership is about multiplying the organizational capacity by sharing authority. Line management shares part of the authority to leaders/specialists. The leader/specialist will always need line management support.

The line manager acts like an enabler. S/he is expected to do the following:

- Find, motivate and support leaders.
- Orchestrate all leaders' activities in order that all focus on and support the organizational strategy.
- Make decisions regarding budget and resources to help leaders reach their goals.
- Remove organizational barriers.
- Solve process conflicts.

2.3.6 Visualize the Workflow & Limiting Work-in-Progress

Shared Leadership is based on Open Kanban. Visualizing the development and/or delivery processes is essential in Shared Leadership. Also limiting the work in progress enables more focus and reaching goals faster. For more information please refer to Open Kanban Practices.
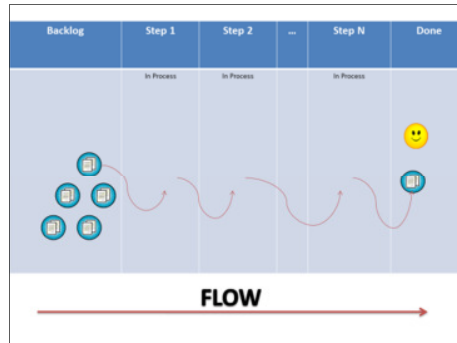

2.3.7 Scrum-ban

Shared Leadership extends Open Kanban values & practices. Visualizing the flow and limiting work in progress are essential practices in Shared Leadership.

Moreover Shared Leadership puts much value on incremental and iterative delivery of positive results. Scrum is a good framework for agile project management.

With Scrum-ban same iterative approach of Scrum is applied.
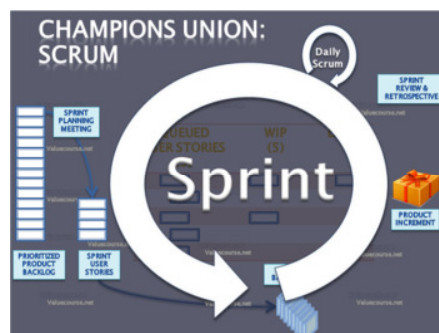
And Kanban is applied within Scrum sprint.
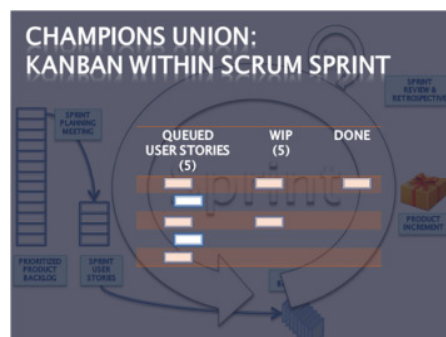
3 SHARED LEADERSHIP LICENCE

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It is based on a work at https://github.com/agilelion/Open-Kanban.

4 APPENDIX A: OPEN KANBAN

Open Kanban is an ultra-light lean framework contributed by Joseph Hurtado and Annita Yegorova Hurtado at AgileLion institute. Many thanks to both of them.

For completeness purposes Open Kanban Values and Practices are listed below. The original documentation can be found here: https://github.com/agilelion/Open-Kanban

4.1 What is Open Kanban

4.1.1 Open Kanban Definition

Open Kanban is an Agile and Lean ultra-light method to improve any area of your organization. Although it's main focus is in IT and Software Development, Open Kanban can be used in any business or non-profit to achieve agility and continuous improvement.

However Open Kanban is not a full or complete Agile or Lean method, instead it is the heart of that method that is the reason it can be ultra-light. The best comparison in the software world would be the kernel of an open source operating system.

Open Kanban includes three key components that define it:

- A set of values that align it with the Agile and Lean Movements for IT and Software Development
- A set of practices that translate those values into action
- An open source license that allow anyone to build upon it or modify it.

4.1.2 Open Kanban Movement

Extensions on top of Open Kanban constitute Agile and Lean Methods based on Open Kanban, or Open Kanban Methods. Open Kanban is the heart of all those Kanban methods. Our license allows them to be free or commercial. All these Kanban methods working together and collaborating are the basis of the Open Kanban Movement. We look forward to having many Open Kanban methods that collaborate with each other to benefit all.

All Open Kanban Methods share in common the following characteristics:

- A common Open Kanban core that is both Agile and Lean
- A collaborative approach to improve Open Kanban itself by submitting their ideas back to the main Open Kanban repository; where they can be shared with all the Open Kanban community.

The nature of the Open Kanban Movement can be easily understood by examining the diagram below:
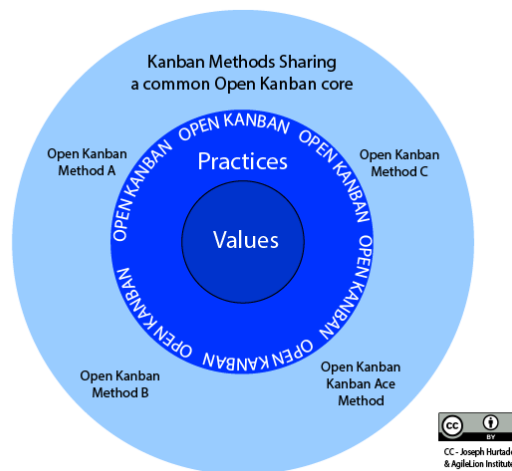
Open Kanban can be extended and customized by people or organizations that wish to create an Agile and Lean Kanban method that is complete and customized for their particular audience. For example Kanban Ace is an Agile and Lean Method based on Open Kanban; but extended to address the particular needs of IT, Software Development and business.

As the Open Kanban movement grows we expect many additional Open Kanban methods to join us. We already share many key ideas with Alan Shalloway's Kanban for Teams, Corey Ladas Scrumban and Karl Scotland's Kanban Thinking. We extend an open invitation to them, and to any leading thinker or organization that wants to join us to build a strong Open Kanban Movement.

4.2 Open Kanban Components

The following are the key values and practices that make up Open Kanban. Given that this is our initial release, we do expect future contributions and revisions. Feedback is welcome, and yes you can use GitHub with a Pull request!

4.2.1 Open Kanban Values

Open Kanban practices are rooted in values that are Lean and Agile; those values are an integral part of Open Kanban. Open Kanban values are:

1. Respect for people

At the core of Lean and TPS is respecting people. Respect for people also means assuming responsibility for your actions, and empowering others to take those actions.

Respect for people allows for delegation and the demand-pull that is crucial to Kanban. When any developer is able to take a story from the backlog and pull it to development or QA, he is able to do so because we respect him, we respect his skills, and we give him the ability to do so, we empower him through our respect.

Respect for people also aligns with sustainable pace in Agile, or Muri 無理 in Lean. If you respect your team you will not work them to death, or subject any worker to intellectual or physical demands that make it nearly impossible to succeed. An exhausted developer, manager or team are the perfect recipe for disaster. Kanban cannot succeed this way.

2. Courage

Respect for people is not enough; like Kent Beck noticed in order to improve or even correct mistakes we need courage. When a manager, VP, or person in authority makes a mistake and someone with lower rank notices it, it takes courage for him to tell us about it.

Courage combined with respect for people enable effective delegation, proper demand-pull and continuous improvement.

3. Focus on Value

One of the key purposes of Kanban is the creation of value. In software development value means the creation of working, good quality code and is also part of Agile. Value implies customer satisfaction, and that is the purpose of our efforts.

Value is at the center of Lean and TPS, but frequently it is mentioned as the reverse side of the coin: eliminate waste or "Muda" in Japanese Muda 無駄 represents anything that does not add value to your process or flow. By eliminating waste, we optimize the creation of value.

4. Communication and Collaboration

Communication and collaboration are at the center of teamwork. One value does not work without the other that is the reason we decided to group them together. To succeed we need to make ourselves heard (communicate) but also we need to be able to work with others to create value.

Without teamwork Kanban fails, and to be honest almost any business that does not communicate and collaborate properly will fail.

5. Holistic or Systemic Approach to Change

Deming's System of Profound Knowledge and Goldratt's Theory of Constraints reminds us that no single part of a system can ever bring overall improvement. We need to take a holistic view of the system and understand it. And the key part of the system is people, not just as resources, but also as full rounded individuals who make the system work.

Kanban agrees with this vision and aims to drive improvement where it counts. An understanding of the whole is fundamental to arrive at steady, successful change.

4.2.2 Open Kanban Practices

Open Kanban values translate into action by following four key practices:

1. Visualize the workflow

When we are doing knowledge work, like programming a method, designing a user interface or writing a business report most of the work is invisible. This means that the output of your effort is much smaller than the effort involved, and the bulk of that effort cannot be easily seen.

Kanban deals with this challenge by using Kanban boards, visual representations of the flow of work that show how work items move from stage to the next.

This Kanban practice makes it easier to collaborate in a team setting, and also provides transparency about the process and the work everyone is doing. If you are a manager you can easily see at any moment what is the status of things, and if you are a team member you can see your impact on the overall work.

Visualizing the workflow is not limited to Kanban boards; one can also use signs and diagrams that the team can see in their work environment, like dashboards, performance metrics or other information radiators.

2. Lead using a team approach

Unless your organization is composed of just one person, you cannot achieve anything worthwhile without leading a team.

Although Kanban starts where you are, and does not need to modify any titles or roles in an organization, Kanban cannot work without a team to deliver value.

Teams and team leadership are crucial to deliver value. Both are needed in Kanban: good teams and good team leadership. No need for new roles or titles, but we do have a need for working teams, with leaders in them!

3. Reduce the Batch Size of your Efforts

Research in the way the mind works, and countless experiences from Lean, the Theory of Constraints and Kanban confirm that to deliver value faster, with better flow and good team morale we need to focus and limit the number of things we do. Multitasking does not work.

Limiting how many things you do at any given time, means reducing the batch size of whatever you are doing at a particular stage of the value chain. By doing this you will deliver value faster because you are able to focus your efforts, one of the best explanations of this fact has been given by Donald G. Reinertsen. Keeping the team focused helps them finish what they start faster.

Limiting WIP is a consequence of reducing the batch size of your efforts, and not the other way around. However doing either will result in improvements in efficiency and productivity. Open Kanban does not ask you to limit WIP, but it does request that you "Reduce the Batch Size of your Efforts."

How do you reduce the batch size of your efforts? Reduce the complexity and the quantity of things you do at any stage of the value chain. In software development this would mean: reduce the number of large stories (epics) you create, and do your best to keep stories simple; also reduce the volume of stories you work on any stage of the Software Development Life Cycle; this way your team will focus, and deliver more value.

4. <u>Learn and improve continuously</u>

The four previous practices ensure you are doing things better than before, and that you deliver more value. However to make sure you make a significant jump in innovation, morale, and value we must also stop, learn and apply our knowledge to improve!

It is worth mentioning that this practice aligns with the Agile value of embracing change, and there are many ways a Kanban team can implement this practice, you could have Retrospectives, Strategy Meetings or even Kaizen Groups.

Learning is the key concept before continuous improvement can ever happen! Once learning is part of the culture, part of the workflow, then improving continuously becomes easy.

Open Kanban further supports learning by listening to the community and updating itself to be a better Agile and Lean method.