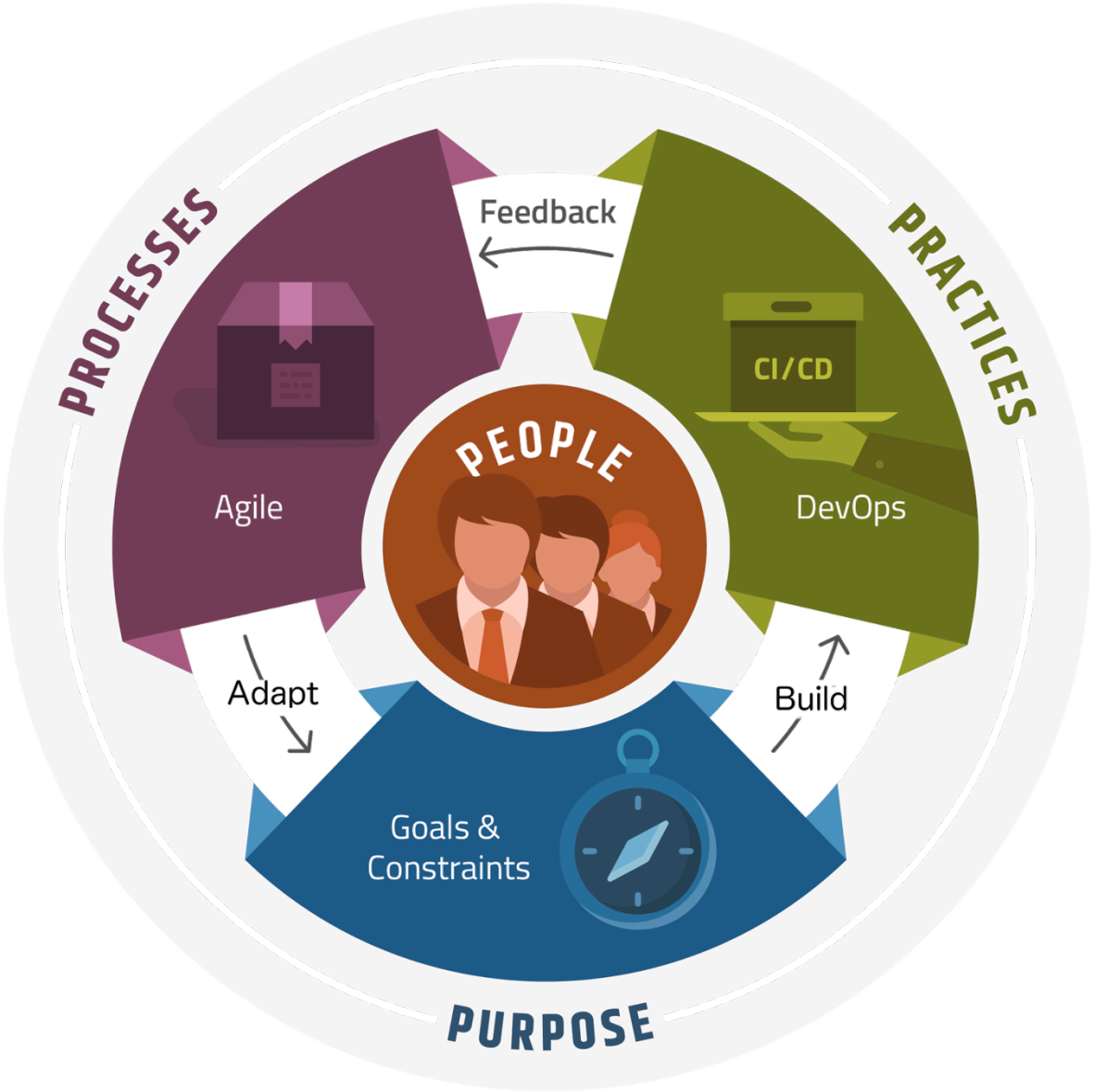
Making Sense of IT

Short Handbook v1.0
2019


PROCESSES
Feedback
PRACTICES
CI/CD
PEOPLE
Agile
DevOps
Adapt
Build
Goals &
Constraints
PURPOSE

PREFACE

«*Je weniger die Leute davon wissen, wie Würste und Gesetze gemacht werden, desto besser schlafen sie.*»

- Otto von Bismarck

This guide aims to document the main pillars of an approach that has been used in companies across Germany and Switzerland. It is the result of more than 30 years of experience as an IT technical contractor for organizations like Telefonica, Siemens, MSF, Credit Suisse, UBS, etc.

For many years, my assumption was that many decisions that were evidently wrong at technical level had more important reasons to exist from a management point of view. This assumption was time after time, proven to be wrong.

The conclusion is that there is an important disconnection between some decisions and their consequences. MBAs prepare people to decide under conditions of high uncertainty. A better approach instead, would be to recognize what we know, what we do not know, and find together the rest. There is much more information available within any organization than we can imagine.

The challenge, however, is that this information is not on any record. As the best CEOs and top managers know, what makes the difference is not any data or method. It is the experience and common sense, that really matters. What we often forget, is that this can be found at all levels.

ZenSum aims to make usage of this experience and common sense wherever it is.

“Zen” because it aims to be minimalist.

“Sum” because it aims to make sure, that each part adds value.

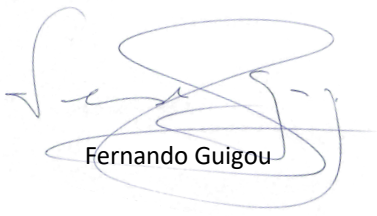
“ZenSum” is pronounced “Sensum” like the Greek word for “sense” because it aims that every single action we do, no matter how big or small it is, makes sense.

A more reasonable approach is certainly needed, or the old statement from Otto von Bismarck that “*The less people know, how sausages and laws are made, then the better they will sleep.* ” is going to remain valid and we should even extend it to “and *how organizations are managed*”.

True, it might be disappointing to discover that the complex world we live in and for which we often blame those in power, is not really being controlled by some evil mind but just too big, fast changing and intricated to be easily manipulated.

The good news is that the future is in our hands, as long as we are conscious of it.

Switzerland, May 3rd 2019



Fernando Guigou

QUICK OVERVIEW

note: if you are familiar with Lean, Agile, Scrum, Design Thinking, DevOps, etc. this short summary is for you. Here you will get a quick overview before deciding to read the details.

Most organizations have today some teams using Kanban, Scrum or any other agile approach. But in order to improve even further, they need to increase across the whole organization:

- **Teamwork** inside and across the different teams
- **Automation** everywhere, with testing and deployment as an indispensable minimum
- **Collaboration** at enterprise level, replacing silos with full-stack teams
- **Alignment** across multiple high performance teams
- **Pragmatism** (or scientific thinking)

ZenSum helps to improve in all these aspects, providing clear guidance in a consistent manner.

TEAMWORK

The team (like the family in our society) is considered in ZenSum the foundation of any organization.

Team dynamics and construction imply much more than just the sum of its parts. ZenSum promotes that teams are not only self-organized, but also self-built. Each individual should be able to choose which team to work with and viceversa. We will see later in detail, how to achieve this.

AUTOMATION

If you do not have your tests and deployment automated, this is where you need to start with a strong sense of urgency. Not having these elements in place, is like not having electricity, desks or chairs. It is part of the basic infrastructure you need in today's world to start developing software.

Of course, automation does not end here, but It is essential to understand the minimum required.

If you are going to get started with test and/or deployment automation, you probably want to consider the points described under **PRAGMATISM**. Basically:

Think big. Start small. Try multiple controlled experiments. See what works. Grow from there.

COLLABORATION

Organizations based on traditional division of labor, roles and silos are condemned to perish.

Having cross-functional teams means much more than a group of individuals with different skills.

It means to have *everything* you need in order to *do* and *decide* whatever is necessary to deliver a meaningful solution. And as we know, in Lean, any intermediate work is waste; so we are talking about final results delivered by full-stack teams. Business and IT, Marketing and Production, Research & Development with Talent Development, all working together towards a common goal.

ALIGNMENT

A team is not only a group of individuals, just like an organization is not merely a group of teams. Defining common goals and objectives, assigning the necessary resources, aligning different efforts, etc. are all aspects that help an organization to work as a single unit.

ZenSum governance is implemented through **Collaborative Boards**, in order to keep teams aligned (among other things).

Most organizations are familiar with boards. There is often a board of directors and also projects are steered by boards formed by sponsors and senior managers. It is the natural place where progress report is formally presented, and major decisions are taken.

But these boards often have an important problem: *reality is not always described trustworthily*.

To avoid this flaw, in ZenSum the most common board meeting (the intermediate ones) are not a status report session. They are instead an opportunity, for the teams to ask for help and feedback. Transparency is essential.

There are three different kinds of Board Meetings in ZenSum:

- An **initial meeting**, that is similar to a kick-off and is the formal acceptance of a proposal
- Multiple **intermediate meetings**, where teams ask for help and feedback
- A **final meeting**, similar to a go-live decision

The biggest difference is in the intermediate ones, as already explained. These are not a status report meeting, because in a status report there is a natural bias to present things better than they really are. Instead, this is an opportunity for the team to come with the problems and get the necessary support to achieve the results previously agreed. We will later discuss all these meetings in detail.

PRAGMATISM

This short summary was written for those already familiar with some Agile & Lean concepts. If you have read for instance the Scrum Guide, you may have noticed that the Scrum Guide says: "*Scrum is free and offered in this Guide. Scrum's roles, events, artifacts, and rules are immutable and although implementing only parts of Scrum is possible, the result is not Scrum.*"[1]

This is not the case with ZenSum.

ZenSum is only an approach. A way to put some pieces together, build a common vision and start making some initial steps. It is heavily based on the so-called "Toyota Kata".

Therefore, ZenSum is not an "all or nothing" approach. On the contrary, it is open, endless and each of the principles and parts of it can be totally or partially implemented and further developed, without limits.

In fact, you can start using ZenSum in small groups. It is even recommended to do it this way, so you try multiple experiments and continue building on top of those cases that have worked better.

The most important thing when you use ZenSum is not ZenSum itself, but the capability to always improve the outcomes through a better working environment, generating more revenue, higher engagement, more knowledge, ownership, productivity, customer satisfaction … and happiness.

At the end of the day, like Charles Chaplin said at the beginning of "Modern Times", this is:

"A story of industry, of individual enterprise ~ humanity crusading in the pursuit of happiness."

[1] End Note. Page 19 ©2017 Ken Schwaber and Jeff Sutherland

INTRODUCTION

ZenSum is an approach to lead autonomous teams in a collaborative way, through the adoption of lean principles and the orchestration of different alternatives that the teams can use to get their job done and deliver great results.

More specifically, ZenSum brings together in a comprehensive approach, options like Kanban, Scrum, Design Thinking, etc. and has a strong emphasis on software, as an unambiguous way to formalize knowledge.

So, while building the “big picture” on how to use the main Agile and Lean implementations, ZenSum also offers an approach to manage, lead and steer autonomous teams. This answers many important questions, because now that Agile is mainstream and every organization has some self-organizing teams, other kind of issues are being raised:

- If teams are autonomous, should we tell them what to do?
- Should we simply let them do whatever they want?
- How do we align diverse teams, so that different efforts do not cancel each other?
- How do we build these teams?
- How do we assign and control the budget they use?
- Should we plan as always and then let them use this "agile thing" for the execution?
- What is the relationship with Continuous Integration / Delivery and DevOps?
- Is Design Thinking an alternative to Agile and Lean … or are they all complementary?
- Are plans, estimations, deadlines and other similar concepts still valid? How?
- What is the role of management?
- And more …

In order to address all these points in a consistent and comprehensive manner, ZenSum presents a big picture composed by different elements.

Like many innovations, not all the elements are new (the reader will actually get a better understanding in case of being familiar with some of them) but it is the order and place assigned to each part, together with an emphasis in some crucial aspects what makes sense of the whole thing and helps to solve many issues regarding governance, implementation and more.

ZenSum intends to deliver many benefits.

For the different teams, it helps to understand the available options and how they can be used to deliver better outcomes, with more impact, less effort and being aware that the challenges to be faced cannot be solved by a single way of thinking. What has proven to be useful in the past, may not work in the future. So teams will basically "*learn how to learn*" by learning how to see themselves, as a collaborative team within an organization with a purpose, that aims to create value and make the world better.

For those who lead these teams, ZenSum provides a governance alternative that is based on the same principles and therefore fully compatible with the mindset promoted at team level. ZenSum governance is implemented through Collaborative Boards (which are also teams), and by using Toyota Kata they are able to keep the delicate balance between leadership and autonomy. Direction is provided, deadlines and outcomes are agreed, and within these boundaries, autonomy flourishes and servant leadership is accomplished.

For the whole organization, teams can thrive, be innovative, autonomous and at the same time, aligned with the overall goals. Collaborative Boards ensure not only the alignment of the different efforts, but also that each step is worth it, delivering meaningful value instead of promises of a better future, that very often end up becoming our worst reality. No promises: results. No assumptions: facts. No inertia: flow and conscious decisions.

For all of us, ZenSum helps to rebuild important connections we have lost, while solving many contradictions of the old system.

For example, mass production and division of labor have contributed to an impressive jump in productivity but at the same time, as things became more and more complex, we lost the link between our actions and their ultimate impact. New generations are horrified by how much we have devastated our planet but even more, about how much unconscious we have been about it.

Talking about contradictions, just think on how many people you know (maybe including yourself) that are demanded to perform "more" but at the same time, are limited to a concrete role and expected not to do anything beyond it, even if they could. Being limited to how much we can contribute, under penalty of offending others who were supposed to do it, is a contradiction. The same as aspiring to a better life, but being constrained to do always the same thing, and so on. All these contradictions generate frustration and derive in unnecessary discussions, blaming, suffering and even violence.

Arthur Schopenhauer once wrote:

> *« If every desire were satisfied as soon as it arose, how would men occupy their lives, how would they pass the time? Imagine this race transported to a Utopia where everything grows of its own accord and turkeys fly around ready-roasted, where lovers find one another without any delay and keep one another without any difficulty; in such a place some men would die of boredom or hang themselves, some would fight and kill one another, and thus they would create for themselves more suffering than nature inflicts on them, as it is. »*

The first time I read this, I thought:

> "F*ck!! No matter how good paradise can be, we will always ruin it!".

Probably I was not alone in thinking this way.

And then, suddenly, another thought came out:

> "Hey, we already *are* in a paradise ... *we just need to care for it*".

MOTIVATION

There are several reasons why ZenSum has been developed.

PARTIAL SOLUTIONS

Scrum, Kanban, Design Thinking, DevOps and many more, have made very important contributions to improve organizational agility, work in a more meaningful way and implement Lean values and principles across the whole organization. However, these contributions normally focus on a specific area and do not seem to be always aware of the existence of the rest.

ZenSum aims to build a big picture, indicating also some criteria in order to choose the corresponding approach in each case.

DOGMATIC IMPLEMENTATIONS

Cargo Cult is a belief system where some practices are performed with the hope of achieving unrealistic results. If you check some videos on the internet[1] it might be heartbreaking to watch those who lacking the knowledge we are familiar with, tend to interpret the facts in a wrong way.

Similarly, future generations will also look back to how projects were run for decades until now and may also feel sorry for us.

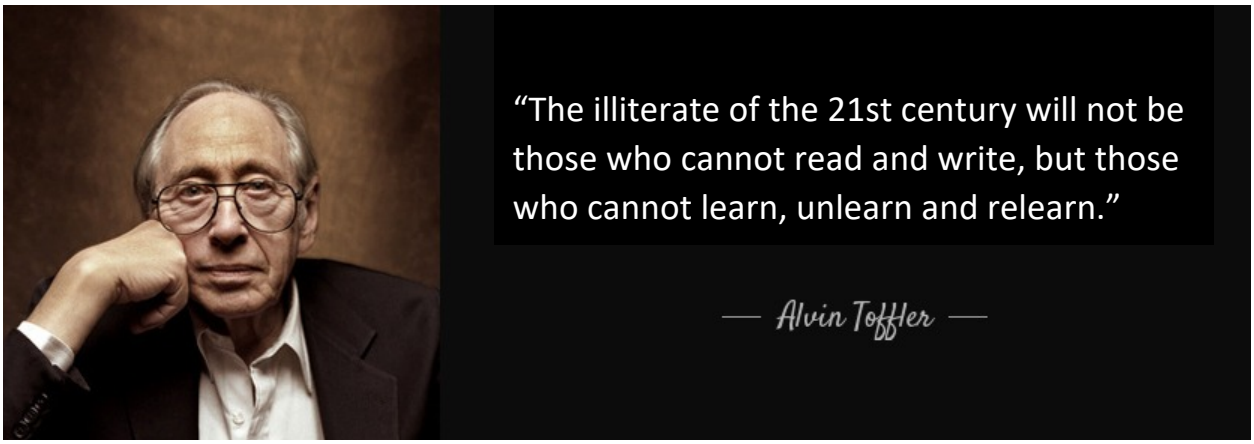
Science has always insisted on how important it is to question everything. But traditional business approaches have been insisting on the contrary: *build a plan, make it perfect, results must follow.*

To leave this dogmatic approach behind, where we try to force the reality when our original estimations are not confirmed, is probably one of the most challenging shifts we need to do.

If facts do not confirm your hypothesis this invalidates your hypothesis, not the facts.

This obvious statement has been ignored too often, causing terrible damage, losses and frustration.

ZenSum avoids any dogmatic implementation and promotes that you question everything. Yes, including ZenSum itself and if this is your best way to keep on continuously improving.



[1] https://www.youtube.com/watch?v=dVZ9bPRTiIA
https://www.youtube.com/watch?v=qmlYe2KS0-Y

"Agile is implemented Agile" is a motto used in ZenSum trainings.

This means that there is no big jump into the vacuum, overnight implementation or a long plan that will deliver something that actually is not a result, but a way to achieve them.

Until you have enough evidence that something works, run small experiments. Many. Small. The bigger the risk, the smaller the scope should be, so learnings exceed failure and worth the cost.

Growing from there, you will also learn not only to reduce failure and risk, but also how to build and share knowledge in your organization.

Learning how to implement ZenSum properly may be even more important that ZenSum itself.

COLLABORATION AT SCALE

In his wonderful masterpiece Sapiens[1], Yuval Noah Harari takes us into a fantastic journey where we discover that one important reason why I am writing this and you are being able to read it, is our capacity to cooperate.

Neanderthals were stronger, with bigger lungs and brains than us and still, we prevailed.

The secret? Among other things, our bigger abstract world and richer language made possible for us to build strategies in our collective imagination. So, any first battle may have been probably won by our stronger, less tired and bigger brains cousins. But the next time, while they will probably repeat the same actions, we can organize our group in a better way, surprise them and prevail. So important is collaboration.

True, competition is also good. So … how does ZenSum balance both of them?

In the same way as team sport tournaments work.

Teams compete with each other and those with the best capacity to cooperate and achieve results, are the winning ones. Same and clear rules apply to all. And as in team sports, members can freely move across different teams, keeping the balance between competition and collaboration. There are even local and international competitions, so the same players can be teammates in one case and adversaries in the other. The system balances and improves.

ZenSum also provides mechanisms not only for high performance teams to thrive, but also to build steering teams that help to keep the overall alignment while preserving autonomy. These steering teams are called Collaborative Boards and are explained later.

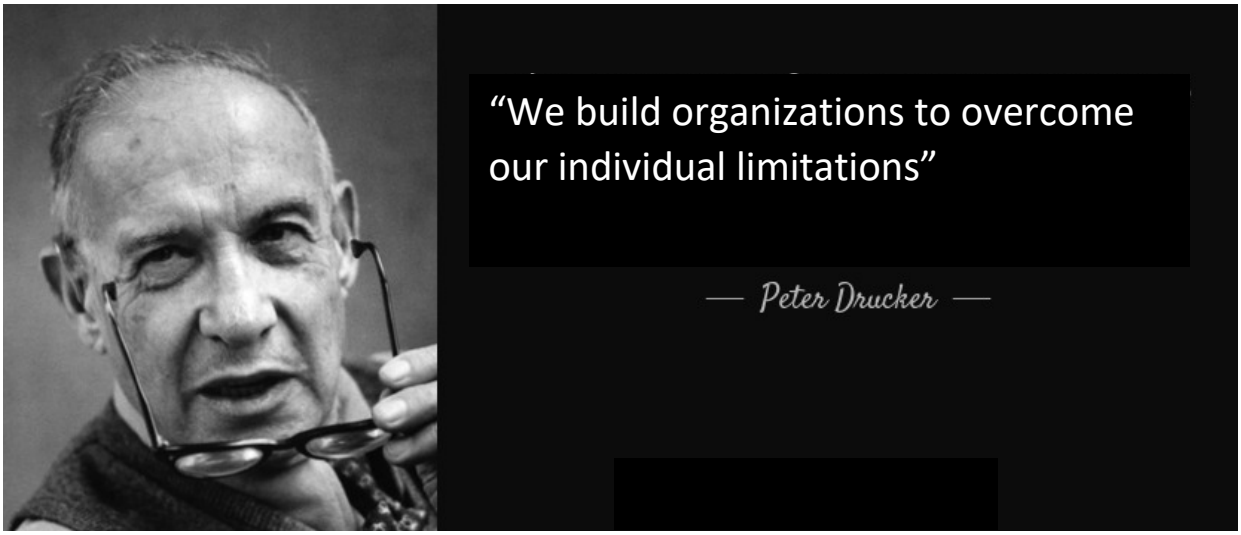
TEAMWORK EVERYWHERE

When being at school, I was told that "*family is the foundation of society*". It is indeed, the first group where we interact as humans and its influence is undeniable.

In the same way, teams are the foundation of any organization. Especially Lean & Agile ones. They are not just a group of individuals. Each team represents to its members, very often, the whole organization. They can be a reason to stay or leave somewhere else.

Once an organization is able to build high performance teams, you better look after them and keep them safe. Empower and promote them further, using them as an example. They are more than the sum of the individuals. This is why sometimes great players in a certain context, do not perform equally well in another one.

[1] https://www.ynharari.com/book/sapiens/



Mass Production was a big step forward after 2.5 million years of artisanal work, counting since we started shaping stones. Just 200 years ago our life conditions were still miserable. The comfort that most of us have at our disposal today, is not the result of working harder, but smarter. In a similar way, the big jump in productivity that Lean means is something we have never seen before.

In this future world of abundance, it will be very easy for individuals to choose the right organization where to work and more specifically, those people closer to him or her. This means that the team to where the person belongs, will play an important role in retaining talent.

Just think about it: if people can choose the organization where they want to work, why not let them choose also the people and team with whom to work within the organization?

BUILDING THE PUZZLE

By bringing together some partial solutions, where each one has a clear contribution and purpose; avoiding dogmatic implementations where reality tends to be dangerously ignored; and by implementing an organic and sustainable approach that delivers real and concrete benefits on each step; we get very close to an unprecedent capacity to collaborate in large scale, hard to imagine within our actual context.

All this is achieved through different elements that interact in a way that potentiate each other.

We are going to see each of them in detail, when talking about the **Fundamentals** and **ZenSum** in detail.

But having all the pieces and building the puzzle are two very different things.

It is in the dynamics, in how each piece is put on place and in the transition from your actual situation, that the difference is made.

These interactions and the first steps to implement them, are described when talking about the **Implementation**.

Having a comprehension of where you are, where you could be, what elements you need to put on place right now and how to continue your journey, is the best way to implement ZenSum. This is how organizations and people shine.

Welcome to ZenSum. Welcome to a collective learning journey. Welcome to Lean.

FUNDAMENTALS

The following are some basic constituent elements of ZenSum. A short description of each one is presented here, and this is the meaning of the concept every time it is mentioned later.

These concepts are not specific to ZenSum, but preexisting ones that ZenSum is built upon.

AGILE

Agile is understood in ZenSum as the Agile Manifesto[1]. No less. No more.

The four values have made a huge impact and despite its profound meaning, the different interpretations and attempts to explain them further have sometimes produced more confusion than clarity. Here, we stick to the original source without adding or removing a single comma. The 12 principles are considered part of it too.

XP

XP (or eXtreme Programming) is an agile process with a strong emphasis in some software engineering practices, like TDD, Pair Programming, etc.

SCRUM

One of, if not the most, popular agile framework at the moment.

However, even though the guide says that anything not following the guide rules is not Scrum, ZenSum prioritizes Lean and Continuous Improvement. This means that Scrum is seen here as a great starting point, but organizations should go beyond it and overcome even these simple rules, if they get in the way of creating value. In ZenSum, Scrum is another way to deliver value and not a goal on its own. It is not even applicable in all situations.

KANBAN

One of the simplest elements of Lean, introduced by Taiichi Ohno in order to build self-regulated systems. Kanban boards are very common today to visualize work and even though visualization is crucial in ZenSum, it is not limited to Kanban. In some cases, as we will see, Kanban is preferred over Scrum.

DEVOPS

Technical improvements have made possible the automation of tasks that traditionally have always been performed manually. Continuous Integration and Delivery meant a huge step forward in comparison to the long weekends that used to be needed to deploy a new software version in production.

These technical improvements also meant a cultural change, where hand-offs are eliminated and different teams (Development + Operations) work together towards a common goal, removing silos that were previously built.

DESIGN THINKING

A systematic approach to elaborate new ideas and products, initially conceived and implemented by IDEO. it is especially useful in those cases where the solution to be built is not yet fully clear. It helps to elaborate hypothesis, validate, observe user experience and refine the solution. It is quite similar and compatible with many practices promoted by Lean Startup, with a bigger focus on the solution and user experience, rather than the business aspects.

[1] https://agilemanifesto.org/

LEAN

The broadest and most difficult concept of this list. It was developed by Toyota and initiated as a production system. It is now evident that the principles and values that sustain Lean represent a whole paradigm shift.

In the same way that Mass Production became the de-facto standard for two centuries, Lean is a superior system to deal with uncertainty and variation, releasing the full potential from each of us. Being a different paradigm, Lean also resolves many contradictions inherent to the division of labor, that so much conflict and suffering have caused.

The focus on value and elimination of waste is still confusing for many, who over-simplify it to cost-reduction. Lean is not yet fully formalized, and it is more a system under development, hence the difficulty to define it. ZenSum for instance, is a contribution to Lean and it is based on many of its principles.

Of course, waste reduction (and this is where cost reduction comes in place) is important. But even more important, is the creation of value. To have a higher purpose. If a company wants to dramatically reduce costs, here is something to consider: *what about bringing all costs to zero … by closing the company?* You will probably not call it a success.

To quote Taiichi Ohno on cost reduction:

> *"The Toyota Production System clearly reveals excess manpower. Because of this, some labor union people have been suspicious of it as a mean of laying off workers.* ***But this is not the idea****.*
> *Management's responsibility is to identify excess manpower* ***and utilize it effectively.****"*

Or to say in Mary Poppendieck's words:

> *"Cost reduction can be a great secondary objective. But a disastrous primary one."*

Just think of it: if you want to go from A to B, the straight line is the most economic path and it makes perfect sense. *But the primary goal is to get to B*. Without a destination or purpose, you have nowhere to go. You remain still. Your costs can be zero, but your company doesn't run anymore.

Furthermore, you may be reducing costs by switching from one option to another, but if the whole purpose is meaningless, you are solving the wrong problem and optimizing for nothing. Decisions like "*reducing costs by XX%*" (and applying it blindly through the whole organization) totally miss the point. It is like being operated by a blind surgeon, who cuts here and there, without differentiating the excess of fat, from the muscles and organs essential for life. Instead, make clear the ROI contributed by each part and costs will be managed as a consequence of that.

Furthermore, waste reduction is not a one-time effort. It is a continuous task for which the definition of value and the direction to create it, are essential. A goal is the north star that allows to recognize futile efforts, which are waste.

And reducing waste is much more than reducing costs, in the same way that Lean is much more than reducing waste.

But our impossibility to enumerate everything that Lean is, doesn't mean we do not have any concept.

Ultimately, Lean is based on scientific thinking. No contradictions. No blind assumptions. Facts.

A very distinctive element worth mentioning, is that humans are considered people and not mere resources performing a limited function, which utilization should be maximized.

Reducing a person to perform only a small part of what (s)he can do, is considered disrespectful … and wasteful.

Being based on scientific thinking, Lean aims for consistency and rejects contradictions. And by considering humans as such, important aspects related to motivation, healthy environments, clear purpose and more, become essential.

It may sound utopic. It is not. And it solves many conflicts and contradictions from the past.

Karl Marx used to say that a worker is paid by the labor power (Arbeitskraft) instead of the work itself (Arbeit).

While this may have been true in mass production and people were paid for the time spent at work, this is not the case in Lean. What matters is not the time spent, nor the effort, but the outcome achieved and their ultimate impact.

Jeff Bezos says it very clearly in the 2017 letter to shareholders, when warning about "proxies":

> *"Good process serves you so you can serve customers. But if you're not watchful, the process can become the thing. This can happen very easily in large organizations. The process becomes the proxy for the result you want. You stop looking at outcomes and just make sure you're doing the process right. Gulp."*

We have been living in a world of proxies. Doing *this*, expecting to get *that*. In a complex world, it doesn't work.

The progress and world of abundance that we have ahead of us is hard to imagine. As well as its implications.

While in a culture of scarcity, social status is often related to what people *have*, in a culture of abundance status is defined by what people *contribute* and *give to others.* This becomes the rare and more appreciated virtue.

Thank you for learning about Lean. Thank you for learning ZenSum. We hope it helps to build a better world.

TOYOTA KATA

While being part of Lean, Toyota Kata deserves an explicit mention.

In very simple terms, it means the balance between long- and short-term actions.

It is actually a concept we can find in many situations in life. For instance, if you are on the beach and want to cross through a group of rocks to go to another beach; or if you are climbing a mountain; or traversing a small stream by stepping on different stones; in all these cases you need to keep the vision of your destination, while at the same time pay very close attention to each step you are taking. You make progress by trying multiple small and controlled attempts and then continue based on those that have proven to work.

If you only focus on your destination, you may fall over. The importance of each single step is easy to understand.

But if you only focus on each step, you may survive for a while and then, end up at a totally wrong destination.

The financial crisis of 2008 is just one (yet painful) example of focusing only on short-term goals.

When using Toyota Kata, your vision is the "North Star" guiding every single step and at the same time, you can also focus all your attention on deciding and executing your immediate next step. For those familiar with Scrum, it is as if each step is a sprint and after doing it, you make a break, have a look around, and decide how to proceed further.

Sometimes, if risk and uncertainty are too high, you may take only one small step. In other cases, if the overall situation is much clearer and more certain, we can go for a bigger scope. What is important, from the perspective of Risk Management, is that the risk of each step is acceptable and future results are not compromised.

To learn more about Toyota Kata, the main reference is always the homonymous book, from Mike Rother[1].

Going one step further and discussing about the imbalances of rewarding short-term success, while leaving others to deal with the long-term consequences, the book "Skin in the Game"[2] from Nassim Taleb is an excellent reading.

The concept is actually very simple. What might not be so easy, is to have the discipline to relentlessly apply it. Traditional mindset and organizations aim to build large, complex and too detailed plans, that can later no longer adapt to a dynamic reality. Setting goals and constraints, while providing the necessary space for experiments is crucial, when we deal with uncertainty, ambiguity and other challenges, beyond replicating copies of the same thing.

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[1] http://www-personal.umich.edu/~mrother/Homepage.html

[2] https://en.wikipedia.org/wiki/Skin_in_the_Game_(book)

NEMAWASHI

Meetings are an important element in the dynamics of any organization. They are essential for communication. But too often they have been used for mixed purposes, resulting in less focus, efficiency and effectiveness. Many organizations are still today struggling with bad, boring and unproductive meetings that reach no conclusion, decision or any kind of action. There are still multiple advises on how to improve them, based on the dynamics, moderation and other aspects that are unfortunately missing the main point: *the content.*

In Japan instead, there is a practice called "Nemawashi" that is brilliantly explained by Rochelle Kopp in a series of articles that cover from the definition to the implementation, going through the cultural aspects involved[1].

The basic idea is to separate the discussion from the formal decision. This saves time and keeps the meetings focused.

ZenSum adopts and promotes Nemawashi, using two different types of meetings: *formal* and *informal*.

Formal Meetings are focused on decisions to be taken. They have a clear purpose and normally last 30min maximum.

Informal Meetings are used for the preparation of Formal Meetings, making them effective and efficient. They can take place anytime, anywhere, with any person. Even though they do not involve all participants at the same time, every single person should take part, so there are no unpleasant surprises in the Formal Meeting.

In short*: we avoid discussions where not all participants are engaged or feel comfortable to express their opinion.*

Discussions can be of imprecise duration. Formal meetings are normally time-boxed to 30 minutes.

This distinction between "formal" and "informal" is a terminology used in ZenSum and from a certain perspective, "informal" (could also be called "preparation") meetings, can be actually very formal in the manners, but no official decision is made. This is only done when all participants are present at the same time and is the only formal decision.

The basic idea is to separate any clarification or debate, from the decision itself.

A team or person aiming for any given approval should make sure that all relevant participants are clearly informed, their questions answered and their points of view and any other special consideration, taken into account. They all should be reflected in the decision and/or the pros and cons of the alternatives.

The preparation effort for the meetings can be very different, depending on the complexity of the topics, people involved, data available, etc. A good preparation results in a clear decision where everyone can agree based on the data presented, the pros and cons of each option and the suggested recommendation.

The preparation of a Formal Meeting does not necessarily aim for a decision but for a clear, objective and comprehensive presentation of all the alternatives. A poor preparation may reveal options or arguments not previously considered, resulting in the termination of the formal meeting indicating that "*further analysis is needed*".

Formal meetings are not (and should not be) the place for discussions. Points can be raised, but their discussion takes place separately. Think of them like a DSM in Scrum; if impediments or any other topic is raised, it is discussed afterwards and not in the same meeting.

Summarized, we can say that Nemawashi helps to improve meetings in many ways:

- By promoting a clear separation of concerns, where debate and decision take place in different moments.
- By using formal meetings as the event where previously agreed decisions are officially adopted.
- By providing decision-making participants all the data and giving them time to reflect on the different options.

[1] https://www.japanintercultural.com/en/news/default.aspx?newsID=234

ZENSUM

Implementing ZenSum is not just about superficial changes or replacing one checklist by another. It is about profound concepts, like for example: how organizations conceive themselves.

The traditional mindset of viewing an organization as a big machinery, where each gear has a precise function and a master mind controls everything is neither flexible nor fast nor adaptive enough for complex environments.

To implement ZenSum, it is better to conceive an organization like an evolving ecosystem. Tim Harford makes the analogy very clear in his book "Adapt"[1]. Instead of creationism (following a plan), an evolutionary approach works better in uncertain circumstances. Simple: while plans work on paper, diversity and small experiments work in reality.

The role of leadership in this model is then to create the right conditions for the teams to be formed, evolve and deliver outstanding results. This includes the definition of goals and constraints, as well as other aspects that can be grouped in four main areas:

- **People**
- **Purpose**
- **Processes**
- **Practices**

Let's see these areas with more detail.

PEOPLE

People are the centric element in ZenSum. This is the focus, the basis, the raw material for the building blocks that make an organization. These building blocks are the teams.

As it was said before, a team is to an organization what the family is to our society. The basic cell.

Leadership is all about creating the right conditions, the ecosystems, in order to allow these teams to form, develop and deliver. We are going to see some key concepts for all this, considering both, general and particular aspects.

There are multiple points of view, based on which we can classify the teams. An important one from the point of view of this guide, is the distinction between delivery teams and leadership teams. The first ones have a direct focus on outcomes. The second, in making the first group successful.

Delivery teams are evaluated by the outcomes and impact they produce. Leadership teams are evaluated by the outcome and impact of the teams they are leading. No proxies. No scapegoats or "fuse management". Responsibility.

When talking about processes, we will see the different options to be used for delivery and for leadership.

Team Building

Teams and organizations are built based on the initiative of some individuals.

We are going to focus on teams, but it is important to notice that almost everything we are going to say, applies to organizations too. In fact, a team can be seen as the seed for a future organization. Building spin-offs, should be a goal for any organization that wants to survive in the future. This is how life perpetuates itself.

This means that small teams of 2-3 people start with a clear concept and look for leadership support and resources. Again: start small. Too many people can lose focus and only one person is not a team. Of course, exceptions happen.

How do leaders build these teams? Easy: *they don't.* What they do, is to create the conditions for them to be born.

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[1] http://timharford.com/books/adapt/

Daily work should be maximum 80% of the time. Free time is equally important as busy time. Both are working time.

But unlike the busy time, free time cannot be scheduled in advance. It is just necessary to "breathe" and take perspective. These are the moments for reflection, see the whole, and be creative and innovative. We can talk about different brain waves or the difference between performing and learning. In any case, *both are important.*

Free time allows people to experiment, try ideas and build teams. Those who germinate can look for support and develop the first sprouts. This is how leadership takes care of the ecosystem. It requires to think more like a seed accelerator and venture fund. This is exactly why consulting firms like Mc Kinsey are promoting that "*management should think more like investors*"[1].

When the team grows and matures, the organization lets those individuals who want to join a team, and teams who want to include some individuals, to work together. They just need to continue delivering on time and budget.

Control

As we are going to see when talking about processes, teams can choose their own one, to deliver the agreed results. Coming from a traditional mindset, a very valid question would then be "*how do organizations control the costs?*".

The full answer would make this guide too extensive, but the basic idea is that every expense is evaluated on a cost / benefit basis. To reduce risk, you manage scope. The bigger the uncertainty and risk, the smaller the scope will be.

A timeline, certain outcomes and the necessary resources to achieve them are agreed upon. Within these boundaries, teams have full liberty to try, fail, learn and build. At the end of the cycle, results should be delivered.

Any interference or attempt to manage the team or team members, is considered in ZenSum *micromanagement*.

In the end, what counts and really matters, are the outcomes, not the activities to achieve them.

Paraphrasing a well-known expression:

> *Be careful with what you control, because you just might get it.*

In ZenSum, instead of controlling activities (expecting results to follow) the control is exerted directly on the outcomes. Hence, the importance of measuring the impact. It is not about how much effort is done, but about how much is achieved. Only completely finished outcomes have an impact and therefore, count. The rest is waste.

Risk

Risk is managed in ZenSum through a time-boxed approach.

Instead of fixing scope and running initiatives that go beyond time and budget, they are both fixed.

Teams manage scope to deliver the best possible value and then, results are evaluated. Is it worth to go for another round? Was it so successful that we can try something bigger? Or not so much and we should try smaller. Or stop?

An important point to observe regarding risk, is that when the step proposed is too big and therefore, the risk and uncertainty are also too big, we have to reduce the scope. Scope should be:

> *Small enough, to mean no risk. Big enough, to be meaningful.*

By managing risk in this way, we can also do two more important things: *deliver* and *learn*. Everything is connected.

[1] https://www.mckinsey.com/business-functions/digital-mckinsey/our-insights/an-operating-model-for-company-wide-agile-development

Alignment

We can do many things that have a positive cost / benefit balance. Here is where the *direction* becomes an important aspect of *leadership.* The "North Star" that guides and aligns the different initiatives in a consistent manner. This is where Toyota Kata comes into the picture, helping us to ensure the alignment.

To make sure this alignment takes place, the same leaders take part in the decisions of multiple teams.

These decisions are taken in the Collaborative Boards we are going to see soon.

Communication

This is a crucial aspect in any human enterprise. The more complex the environment, the more important it becomes.

As it was said before, this is why we prevailed over the Neanderthals. Misunderstandings are often the source of many issues, problems and useless discussions. Good communication allowed us to cooperate and reach the stars.

In ZenSum, time-boxed milestones help to manage risk, reduce waste, deliver meaningful results and learn.

It is in the Collaborative Boards where the formal communication takes place. These meetings are prepared using Nemawashi, which is a fundamental element in ZenSum.

Scope, time, budget, other constraints, and outcomes are agreed. The direction is set top-down. The proposals are elaborated bottom-up. In both cases, it is a collaborative endeavor. But the initiative and formal responsibility, is as described. The reason for bottom-up contributions, is to increase ownership, commitment and awareness on details.

All these aspects are not just theory or concepts you will forget. They are the foundations that sustain the Collaborative Boards that we will see in detail, when talking about Processes.

Transparency

In the past, it was easy to see that workers could focus better if they only know the minimum necessary to perform a simple task. This removes confusion, increases focus and productivity, while also permits to remain in the "performance zone"[1].

While this remains true, the difference is that now just copying and repeating is not enough. Faster and better decisions, as well as innovation and creativity, have also become essential to survive. This means that we need to share more about how we work, learn and improve. We need the information there, wherever it is needed.

The corresponding concept in Lean is called "JIDOKA" and it is deeply related to being a conscious organization.

Some oversimplifications reduce Jidoka to "stop the line", but Jidoka means much more. As it is brilliantly explained in the book "This is Lean"[2], it is comparable to what in the military is called "situational awareness": *to have full visibility of the different elements and events of any given situation, their meaning and the possible future states*.

This is why the so called "information radiators" are so important. Visual communication allows instant feedback. Quick reactions and decisions. Fast adaption. Survival.

There is no recipe on how to build an information radiator, but once you have built one, it should:

- Provide instant information (no further reading, thinking or interpretation should be necessary)
- The information should give a clear indication to perform (or not) a certain action

As an example, think of a traffic light. Once red, you do not need to start thinking what the meaning was and which action you should perform. You stop. If green, you continue. Simple. Effective. The simpler, the better.

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[1] Eduardo Briceño "Performing vs. Improving": https://www.youtube.com/watch?v=KaiwGb0csas

[2] https://thisislean.com/

This transparency impregnates everything.

Meetings in ZenSum are open by default. Anyone can attend. In case of questions or comments, it is recommended for non-members to wait until the end of the meeting. Only in very special cases, you may ask permission for an intervention, but the idea is to learn without interfering with the normal development of the meeting.

In Lean there is a concept called "Genchi Genbutsu" that means "Go & See". If you want to learn how successful teams work, go and watch them. Observe with minimum interference, otherwise you will not see "*the real thing*".

This openness may be harder in some environments today. Start small. Learn. Grow from those cases that work.

Transparency is also related to having a clear purpose. Instead of "*just do your work*", people need to understand the reasons behind it. The problem being solved. The constraints to do it (e.g. time, budget, etc.) and above all, how to measure success (i.e. the impact of our actions).

This allows better decisions to occur, especially in a changing environment.

The bigger an organization is, the more important it is to count on clear metrics that make impact visible, transparent.

Transparency consists in making all the necessary information available where needed, in order to decide and deliver. This makes informed and better decisions possible, with the corresponding increase in productivity

Please make sure that you have no doubts about the importance of *alignment*, *communication* and *transparency*, so you know that you are ready for our next topic: *purpose*.

PURPOSE

Any organization needs a reason to exist and create some value to live.

Like a person who needs to eat in order to be alive and have a purpose in order to live this life in a meaningful way, organizations need to create value and consume resources, but having a purpose is what provides a meaning and consequently helps to align all different efforts.

This purpose can be elaborated, discussed and refined collaboratively among all members but in the end, it is the responsibility of the top management to define it. Intermediate management levels can break it down through different teams that report to a corresponding board. We see this in more detail, when talking about processes.

Purpose is the north that provides direction, guides all different efforts and helps to balance the trade-offs that teams and individuals are making at almost every single moment. Each person makes decisions all the time and purpose, milestones and constraints set the right context to make the best possible ones, while keeping them aligned.

If we do not have a purpose, we fall into "generating revenue" or "reducing cost" low-level tactics.

Being a hospital, we can start selling beds and medical equipment to balance out the numbers. Or (a real-world example) being a bank, we can force all external contractors to take some days off, before the end of the fiscal year.

Even though the balance is looking nicer, are we really doing any better? No. We are actually doing worst!

This is why in Lean an important principle is to *think long term* and prioritize it over short-term wins.

True, cost-reduction is important (as a secondary goal to generate more revenue) and revenue is also important (as a way to measure how much value we are making towards the goal). But if reducing any cost and generating any revenue are valid actions, we will suffer the consequences in the long term.

Purpose is what helps us to understand if our financial results are meaningful or not. Did we generate this value by getting closer to our purpose? Or are we cheating with short-term actions that will cost much more later?

PROCESSES

As it was said before, ZenSum is essentially pragmatic (i.e. practical). It is also empiric (based on evidence), and incremental (the only firm decision, is the very first next step). An important consequence of being pragmatic, is that it tends to be simple. Easy to remember. Easy to follow.

All these concepts reinforce each other.

For example, if we do not have our tests automated, we start just with one. Schedule it to run on some events. Grow from there. Incremental. Pragmatic. It won't be practical to stop everything (or dedicate huge efforts) until something of endless nature is done. We just get started and from now on, each new story or bug should come with at least one new test. Simple. Incremental. This is how *capabilities* are built.

Being empiric, means that it is based on evidence. Not in dogmas.

Some practices may have evolved independently, starting from a totally different standpoint and still, they can be fully compatible with ZenSum and Lean. Because this is the beauty of the scientific method: *it is always consistent.* This means that independently developed ideas, as long as they are based on experimentation (which means that they can be openly challenged) start connecting with each other, and the reality becomes evident (i.e. "emerges"). Only ideas can be contradictory. The reality is always consistent.

One note about processes.

Processes are good when taken as good practices, but they should not become a constraint to be enforced. This may sound weird because they were enforced in the past, when actions and outcomes were always the same. But doing the same thing again and again, will hinder us from continuously improving. This is why every now and then a "Modernization (a.k.a. Transformation) Program" was necessary in order to catch up with things that were not done on a daily basis. Not surprisingly, these transformations or modernizations are taking place more and more often.

True, some regulations may enforce organizations to follow certain processes, but they should not be seen as a way to achieve something (a process) because there are no options there. It is something mandatory and as such, it plays more the role of a constraint ("it is the only way to do something") rather than an option to achieve a certain result.

It may also help to stop using the term "*requirements*", because it implies things of a very different nature. On one side, features and functionalities that a certain system is expected to perform in order to achieve some impact and on the other side, some technical constraints that in the past we have called "*non-functional requirements*".

A feature or functionality that is implemented in order to achieve a certain impact, is a value-creation task.

A regulation, performance constraint, security aspect or any other thing that is mandatory, is not there to deliver value but to ensure certain minimum standards. It plays the same role as time and budget, they are *constraints.*

A feature is a solution to a problem, and this means that we have *options.* A constraint normally has no alternatives.

These constraints, together with clear goals and metrics to measure progress, are essential for any organization in order to continuously improve. The unequivocal definition and communication of these goals and constraints is part of how leadership is conceived in ZenSum.

Leadership in ZenSum is not simply about some personal soft-skills, but about setting the right conditions in the ecosystem, in order to let the teams to evolve and thrive constantly and smoothly, in a sustainable way.

Regarding the way for the teams to deliver value, ZenSum is totally agnostic. Scrum, Kanban or even Waterfall, can be used indistinctly. However, those practices that help the teams to deliver better results at a lower cost and effort will prevail and thanks to the transparency on the way of working, they are expected to pollinate all around.

Nevertheless, some notes on the most common ways of working are worth mentioning. Let's go through them.

Delivery Processes

We are going to revisit only the most common processes, that agile teams are using at this moment.

Scrum

Even though the Scrum Guide says that any partial implementation of it is not Scrum, this is not relevant in ZenSum. The process is not the thing and it is only as good as the results it delivers. Everything is therefore optional.

Teams have been observed, where counting on a proper deployment pipeline, the Review is eliminated in practice. The PO can see the results in a stable environment every day, validate them and if comments are needed, raise them immediately. By the moment the sprint is over, everything has been already reviewed and accepted.

The Retrospective, however, is an event that is encouraged to be always maintained. This is the moment when teams can reflect about how they are working and decide on improvements. It is so important, that even in teams using other approaches (like Kanban) it is recommended to do it too.

Some changes can also be observed, as long as the teams mature.

For example, the need for a Scrum Master tends to vanish once team members have learned not only the rules, but also the underlying reasons for them. They have been able to elaborate improvements, have open discussions, trust each other and focus on how to make things even better. The PO changes from writing user stories, to raise the right challenges and discuss the proposals with the team. This kind of changes are a healthy sign of a mature team.

Kanban

While Scrum is very appropriate for the construction of a given solution built incrementally, Kanban is much more indicated for those cases of continuous tasks, like a help desk, support team, etc.

The metrics in this case are slightly different and as it was said before, having a regular break and doing a retrospective is helpful not only in order to discuss and implement improvements, but it also consolidates the team.

Design Thinking

If Scrum is useful once a solution has been defined and Kanban helps teams that are working on continuous issues, Design Thinking offers a broad set of practices and techniques in order to conceive new ideas and solutions.

A detailed description of it is beyond the scope of this guide, but it is important to highlight the coincidence of many principles with Lean, Agile and the scientific method. For instance, the emphasis on observation, the validation of hypothesis and a solution-oriented approach. What matters is what *works* and not what we think *should* work.

In Design Thinking errors are not handled by blame, responsibilities or instruction manuals. A good design makes mistakes impossible to happen. In Lean, this is called *"build quality in".* Remember this, when building ecosystems.

Summary

As we have seen, there is no specific recommendation regarding the process that each team decides to use.

What we have seen are simply some general descriptions or guidelines, but the decision is up to each team. What really matters, is the measurement of the results, what the outcomes achieved are, and how much value is created.

While traditional approaches have historically focused on processes, assuming that results should follow; in Lean and ZenSum a process is only as good as the results it delivers. If results are not satisfying, the process can be changed.

Any process that is not optional (like some industry regulations require) are not considered processes, but constraints. So they must be observed, like time, budget or any other aspect that limits the universe of the solution.

These constraints are all welcome, because as the old expression says:

Necessity is the mother of invention

Leadership Processes

ZenSum focuses on steering autonomous teams by presenting the right challenges to them and boost collaboration.

Feedback is considered essential to validate progress and the different experiments. To provide feedback, ZenSum emphasizes the construction of transparency and awareness, by making metrics, progress and problems visible.

To achieve extraordinary results, ZenSum empowers teams by providing autonomy within clear boundaries.

And the absence of roles in a team makes possible for each individual to develop the full potential from within. There are no boundaries for the contributions each member can make, as long as everything is transparent and clear.

Instead of telling people what to do, leaders in ZenSum present problems to be solved. They address the teams with the right challenges. Unless some team requires support to achieve the results (in which case, leaders help and practice the concept of "servant leadership"); then leaders are expected to have free time to think and do the so called "forward thinking". What are the challenges that the organization is going to be facing in 6 months? In one year? In three? In five? Are there opportunities that we are overlooking? What initiatives are being proposed? What kind of innovations does it make sense to propose to entrepreneurs? Are there teams mature enough for a spin-off?

At team level, forward thinking is about imagining the future, learning and being prepared for the new challenges.

Traditional organizations that start to use ZenSum may have many different kinds of teams. However, part of maturing through this path, means that more and more teams are becoming full-stack, with all the members needed to decide and deliver outcomes that have a direct impact on what the stakeholders (customers) are expecting. If some basic services need to be offered across all business units, this is probably a need also for other organizations. There is a business opportunity there. Think about a book seller that is now providing IT cloud solutions: *Amazon*.

Life perpetuates itself through diversity. Organizations are not in a finite game of winners and losers. They are in an infinite game of surviving[1] and this is better achieved like life does. Diversifying. Reinventing. Disrupting themselves.

How to steer autonomous teams, exert control under conditions of uncertainty, while promoting ownership, autonomy and creativity, is what we are going to see next, when presenting Collaborative Boards.

If you are a leader, avoid the mistake of thinking that presenting a challenge is enough. Challenges need to be taken by the teams and only then, you know that the articulation is the right one. If challenges are not taken by any team, they may be unclear, too small or too big. You need to articulate the vision to the right level and this is an important part of your job, as a leader. Still, nothing is done until it is finished, and your responsibility is to present the right challenges that can be taken by the teams, support them in their endeavors and validate the results, making sure that all the learnings gained during the process are not lost. Then, your job has been *really* done.

Collaborative boards, as we are going to see soon, are based on Nemawashi as a way to ensure solid decisions and also to make possible management by exception. This means that only when a team cannot reach consensus, decisions are escalated to the next level. If this escalation takes place too often, this is a sign that communication or some other aspects need to improve. It is expected that teams make decisions based on facts and data, not on hierarchy or hypothesis that mean a major risk and uncertainty. If the decision is not clear, they must look for support.

Leadership in ZenSum can be seen as:

1) the art of presenting the right challenges
2) supporting teams in the delivery of value
3) validating the results and (in case of errors) sharing learnings, so errors are not repeated

These three different aspects are aligned with the three different kinds of meetings that Collaborative Boards have.

[1] https://www.youtube.com/watch?v=KbYzF6Zy5tY

Collaborative Boards

Even though not new to most organizations, boards are a distinctive element in ZenSum.

They are different because in traditional organizations boards are a place where to report progress to a hierarchy, while in ZenSum they are a collaborative team where decisions are taken using Nemawashi among all the members. If consensus is not possible, then the decision is escalated. This allows top managers to act only on those exceptions.

Boards provide direction, support and validate the outcome of the different teams. This is where leadership is organically performed. They are a place where teams ask for feedback and help. Servant leadership crystallizes here.

Scope, deadlines, resources and anything else related to the activities performed by the team that cannot be decided by the team itself, is decided in the Collaborative Boards.

Members

Boards are composed by a mix of members from the team being supervised and management. The point is to count on first-hand information about the overall situation, plus all the necessary people to make any decision that can be required. Occasionally, some extra members may be invited, in order to better understand specific points.

Decisions

Boards use Nemawashi to decide and if this is not possible, escalation takes place. Escalations should be prepared by the board with a clear and concise explanation of the situation, the alternatives and the pros and cons of each one. The escalation point should get a clear understanding of the agreements and disagreements, as well as the different options and recommendations. Frequent escalations are a sign that communication needs to be improved.

Escalation

The escalation point for a board can be another board or in rare cases, even a single person. In case it is a person and this person is part of the board that is escalating the decision, it is recommended to make this decision at least on the following day, if possible. This increases perspective for a better judgement.

Board Meetings

The direction, support and validation of the outcome of the different teams is performed by the boards through different types of meetings. If possible, all meetings are open, so other team members can attend, listen and learn.

An **initial meeting** is prepared in order to define the outcome that a team is going to deliver. Even though it is built in a collaborative way, this proposal is formally elaborated by the team. They propose a certain outcome to be achieved within a specific timeline and with certain resources. Management members should help in leading these proposals by providing Goals and clear Constraints, as well as ensuring the alignment of the initiatives from different teams. The decision is basically a cost / benefit decision. Not surprisingly, it is prepared using Nemawashi.

Toyota Kata is the concept behind this approach. The overall goal is presented by management as a rough, long-term idea, together with clear constraints. Based on this, teams come with proposals (next target condition) that are elaborated between all team members and refined in collaboration with the board representatives.

A proper preparation of the initial meeting means that in 30 minutes a positive decision is taken.

Then, **intermediate meetings** take place. These meetings, unlike the ones in traditional organizations, are not a status-report meeting where progress percentage is tracked. In the past, these status report meetings have been often biased to present a situation better than it really was, missing the opportunity for timely corrections.

The goal in ZenSum is to use these intermediate meetings to come up with major problems, risks or impediments that may endanger the achievement of the results originally defined. These are *supportive meetings*, to solve problems. It is up to the teams, to track progress and raise any possible concern.

Of course, these meetings are also an opportunity to validate results and collect feedback, but this purpose of receiving feedback about the work done should not be jeopardized into the evaluation of team performance and results, something that should only take place in the final meeting.

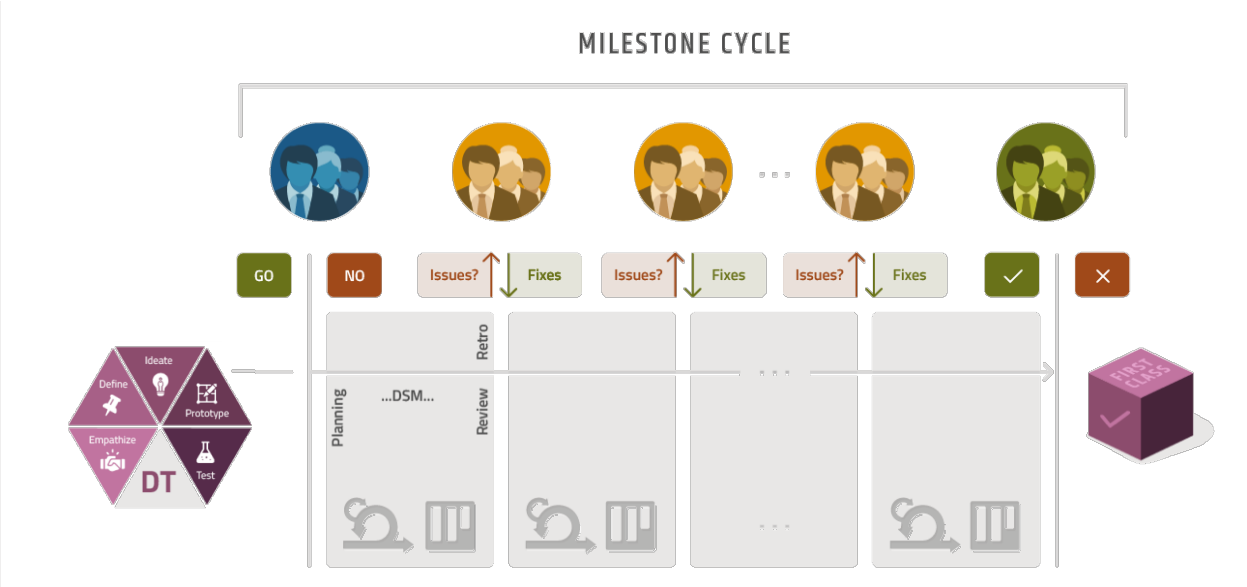
A **final meeting** takes place then, when the deadline agreed in the initial meeting has been met.

Here the results are presented and the board accepts or rejects the results. If accepted, the team can then go into another milestone cycle. If rejected, the board can decide to conclude the whole thing, or to extend the efforts for some time.

It is not acceptable and reveals a poor preparation of the intermediate meetings, if at the end of the whole cycle and without having raised any previous issues, results are not delivered.

Outcomes are tracked in ZenSum in binary mode: done or not done. No percentage.

99% done, means zero. If you have difficulties to accept this, just think on the last time you caught a train by 99%, almost there, being in front of the doors when they got locked. Or think on the last time your favorite team *almost* scored a goal: the ball crossed the line 99%. It doesn't count. Sorry. Just learn from your failures and try again.



Proposals

As it was already said, once the goals and constraints are set (top-down), the proposals are elaborated bottom-up. This is an ideal situation to use something like Design Thinking. But again, ZenSum is open to any alternative that each team may consider better.

What really matters, is that the proposal is reasonable, has an estimation of the value being delivered, has identified possible risks as well as the required resources; while also involves enough people that volunteers to deliver the first results and counts with a rough roadmap about the future. A balance between the concrete step and the long term.

Initial proposals are ideally in the order of 1 to 3 months.

For teams that take the initiative, the previous points are just some aspects to be considered. This can be totally different, because what really matters is the management agreement to take the risks and allow them to have a dedicated effort to achieve the proposed result.

PRACTICES

Among others, a key aspect to increase productivity is the capability to focus on one thing at a time.

To make it possible, two important areas deserve special attention in ZenSum: Automation and Architecture.

Automation

In the past, development teams were constantly interrupted due to bugs and other issues in production or deployment activities. This not only slows down the delivery of new features, but also demotivates, frustrates, promotes blaming and diminishes morale on every participant. It is nobody's fault, but a wrong way of doing things.

By using engineering practices that are on place already for many years, we get testing and deployment automated, executing smoothly with almost no effort, based on solutions offered as a service. Development teams can count on them "on demand" without delays. Deployment pipelines can be easily setup and changed during the lifecycle of the solution. The main reference is still the book "Continuous Delivery" [1] published in 2010.

DevOps in this context is all about supporting delivery teams with the necessary infrastructure, with operations monitoring and improving, involved when necessary, in order to understand the needs and adapt the service offer.

SLAs are typical metrics that help to evaluate these processes and measure their results.

All these processes and practices are the basis to become a digital organization, where modern engineering practices and a DevOps culture have a service offer that enables a seamless development and deployment of incremental solutions, tested thoroughly in an automated way. As it was said before, this is so essential as electricity or desks. The basis to start getting the job done.

Test Automation

Among many others, one important aspect when talking about test automation, is the separation of test specification and test implementation. This separation when done in a language like Gherkin, allows not only to automate the testing, but also to specify in a language readable by non-technical people, *what* should be tested. This makes possible to write a user story, together with the corresponding test specification and get both implemented (the feature and the test case) when the user story is "done". If something fails, it is easily readable what and where, the problem is. Furthermore, Gherkin implementation makes sure that such an easily readable expression is directly linked with the implementation and it never gets out of synch (like comments or other doc do).

Finally, future developments like DSLs or AI may have an impact on these practices and their implementation. But the concept remains the same: *automate*. Automation makes actions repeatable, reliable and auditable.

Without automation, a change that could be done in some minutes, may take months to be deployed in production.

Architecture

A special point also needs to be made regarding architecture.

Especially when talking about large systems, the art of "slicing the elephant" becomes critical to ensure success.

Unfortunately, there are no recipes (so far) on how to slice a system, but once we do it, there are certain aspects that we can consider, to know if it was a good or bad partition.

A result of a good partition will mean:

- High Cohesion
- Low Connection
- Clear Interfaces

High Cohesion

This means that each part is solid, cohesive, and has a clear purpose. It is not just "a piece" or "a bunch" of things put together. There is a clear concept that can represent each single part, and if at any moment we need to look for a bug or implement a change, this cohesion makes it easy and clear to find where. Single responsibility.

[1] https://martinfowler.com/books/continuousDelivery.html

Low Connection
This means that the dependencies among the different parts should be as less as possible. Too many dependencies, means a bad partition. If this happens, we didn't really slice anything. All the parts remain still deeply connected to each other. Try again, otherwise you may have the impression that you have some partition, but this is an illusion and you are dealing with a highly coupled, monolithic solution.

Clear Interfaces
Interfaces need to be clear, intuitive, only the minimum necessary. Unnecessary parameters are a source of errors. Using a parameter to modify the desired behavior is a bad practice and a hint that the module has low cohesion.

Architecture Summary
Architecture is a major concern. Bad architecture means tight and coupled parts of the solution that cannot be easily replaced or maintained. It is exactly the opposite of the old motto "Divide & Conquer" and then, we let the problems to become a snowball, where each single thing may have important and unnoticed consequences.

In short: if you have a bad architecture, no process will be able to help you.

This is so important, that it is worth to say it again:

> *No process can be good enough, to solve the issues of a bad architecture.*

PUTTING IT ALL TOGETHER

One of the beauties of Lean is its consistency. We will find the very same concepts again and again, sustaining multiple and very different situations. Consider for instance what we just said when talking about **Low Connection**:

> *"… the dependencies among the different parts should be as less as possible."*

This is exactly the same principle that stands behind cross-functional teams: *reduce dependencies.*

Remember at the very beginning, when talking about **Collaboration** in the Quick Overview when we said:

> "*Having cross-functional teams means much more than a group of individuals with different skills. It means to have everything you need in order to do and decide whatever is necessary to deliver a meaningful solution."*

In other words, a cross-functional team has no major dependencies on other parts of the organization.

This is precisely why DevOps is such an important concept. In a DevOps culture, you do not *depend* from another team in the sense that you have to *wait* for them to perform a certain task. They make the services available, so teams can use the necessary services on-demand. No delays. No dependencies. No waits. No waste.

Furthermore, this concept applies to the whole organization. As Conway's Law[1] says:

> *"… organizations which design systems (in the broad sense used here) are constrained to produce designs which are copies of the communication structures of these organizations."*

When putting together the way to organize teams (the *people*) with a clear *purpose* to be achieved within some clear constraints, using certain *processes* and *practices*, the whole thing results in a new culture and a new organization.

Don't panic. Use Toyota Kata. *Dream big. Start small. See what works … and grow from there.*

This is what ZenSum is all about.

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[1] http://www.melconway.com/research/committees.html

IMPLEMENTATION

When implementing ZenSum, it is good to remember that most of the elements (including ZenSum itself) are optional. This is because ZenSum is not a goal on its own. Not even implementing Agile or Lean is a final goal. They are just a mean to achieve other things. First of all, productivity.

We are talking about ways of working and we work in order to create value. Therefore, even though the ultimate purpose is our pursuit of happiness, productivity is an essential aspect at work. If work were only about fun, we should simply have a party. Lean offers a much better balance than any traditional approach full of suffering, stress and where holidays are specially celebrated. Lean frees all of us from blind efforts, authoritarianism and limitations.

Having said all that, the transition from the current situation towards a better way of working when implementing ZenSum is done in an agile way: *incrementally.* Remember: "Agile is implemented Agile".

The best thing you can do to start a ZenSum implementation is the same thing any scientist does: *observe.*

What to observe, that's the point. Instead of focusing on how busy people are ("resource" optimization) try to focus first on how much value is being created, what is the ultimate purpose of each outcome and the impact it has. Are they all equally important? Are the most important things really getting the necessary attention? Do we have our focus on the value created from an end user perspective? If something forces us to wait, do we try to get rid of this waste? Or by switching to something different we just keep ourselves busy and feel OK? How can flow be optimized, so waiting times are reduced or eliminated? A basic principle in Lean is that instead of optimizing *resource* utilization, we try to increase *flow* optimization, so value is being created without delays, without waste, without mistakes.

How much value is being created and how fast it is being created, are the only two metrics that will tell you, if you are making progress in your Lean journey. Nothing else. Any other thing is a proxy.

From there, after having set some basic awareness and principles, start presenting some challenges or major goals that your organization, division or department is aiming for.

Build open communications where help is appreciated and the only mistake is to hide something. Encourage teams to be formed, were goals, challenges and success are shared among all members. You can start using Scrum or Kanban but more important, you try to call for proposals and encourage those who want to create valuable things.

You can present some major goals and then wait for the teams to present themselves spontaneously. Or you can organize an official event, where you call for teams to present some work, a concept and a roadmap, in a timeframe relatively short, from 3 to 8 weeks. From there, you select and promote the best proposals, to continue further.

The precise way is not what matters. If one doesn't work, try another. Be clear. Be transparent. Collect feedback.

If not everyone gets engaged, that is totally fine. Build on the bright spots.[1]

Those who do not join this new way of working, will continue performing under the "Command & Control" paradigm.

Those who make the switch, will nicely surprise you when exceeding the original expectations. The rest will follow.

Generating communities and reaching a critical mass, that is your goal for a transition.

After that, just continue improving … this is how we build a better future.

[1] https://www.youtube.com/watch?v=zbLNOS7MxFc&index=3&list=PL4531E5C54EC1050A

SUMMARY

In the past, when Mass Production was increasing our productivity to unprecedent levels, the key element was to make perfect copies in a massive scale.

Today, with production issues relatively well solved and where the full automation is just a matter of time, other challenges are coming up regarding design, innovation and flexibility; bringing our way of working to a new level.

But not only this. Sometimes, the very same thing that helped us to get to a certain point, can become an obstacle.

We are talking about our mindset.

While Mass Production delivered a lot of value, it also generated many contradictions. Lean instead, with an important emphasis in the scientific method and evidence-based decisions, helps to make organizations not only more resilient, effective and innovative, but also a better place to work, where individuals can be themselves, release their full potential, and facts can be discussed without fear or any concern other than finding the best possible option. Solutions. No blame.

In the old approach, the role of management was to give precise instructions.

This works pretty fine in a well-known domain, where we have mastered how to do the things and the division of labor helps us to reach incredible amounts of productivity. The solution is known. Now it is only about doing it.

But facing Volatility, Uncertainty, Complexity and Ambiguity (VUCA[1]) we fall in the contradiction of trying to tell people how to do something, while making them responsible for the results. We cannot do both. It does not work.

A person following orders cannot be blamed for the results of executing them. In the same way, a person responsible for delivering certain results, needs to have the freedom to make decisions within some predefined constraints.

Our fast-changing world and regulated environments offer enough constraints in order to add some artificial ones regarding processes or ways to deliver some results. We need to choose if we want results, or blind obedience.

Alignment is achieved in ZenSum by proposing major goals (direction), for which the teams elaborate proposals and after having an agreement with management, teams have absolute freedom on *how* to deliver these results within the defined constraints. Once the timebox has expired, we can evaluate the outcome and make new decisions.

Successful teams will go for bigger challenges. Those that still need to learn, will go for smaller ones, or even have their members leaving to other teams where they can collect more experience. Risk should always be minimized.

During the process of delivering a certain milestone, teams have the opportunity to ask for help and feedback, and this is how servant leadership is implemented in ZenSum.

Leaders are eager to help teams in their endeavors, providing feedback and support, because the success of the teams they are leading, is the success by which they will be recognized. Teams will look for good leaders and good leaders will help, support and further develop, these good teams. A virtuous cycle that lets organizations thrive.

This is not utopic. It is just common sense and focus on what really matters, when we get together to get a job done.

If there is an elephant in the room, we call it by its name. If we have problems, we have problems (not “issues” or “challenges”). And if anyone has a solution, we will better consider it, regardless of where it comes from.

Only by understanding *why* we do things, we can make them better. This makes purpose clear. Motivates. Engages.

Before concluding, let’s review the questions raised in the introduction:

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[1] https://en.wikipedia.org/wiki/Volatility,_uncertainty,_complexity_and_ambiguity

- **If teams are autonomous, should we tell them what to do?**
  The best approach is to present the problems we want to solve.
  In case we need a specific solution, then we should make sure to explain "why" this is for us the only one.
  But it is always better to leave room for the teams to come with proposals elaborated by them, because we are going to generate much more awareness, ownership and motivation than by giving a direct order.

- **Should we simply let them (the teams) do whatever they want?**
  The previous answer addresses also this point. Once the goals are set, then deadlines can be agreed. Only within these boundaries, autonomy takes place. Aligned Autonomy.

- **How do we align diverse teams, so different efforts do not cancel each other?**
  Because the same members of the leadership team participate in multiple Collaborative Boards.
  These members ensure that the different efforts are consistent and do not cancel each other.

- **How do we build these teams?**
  We do not. We provide the space, by not assigning work for more than 80% of the actual capacity.
  We provide direction, by presenting the right challenges.
  We present the constraints, by indicating the limits in time, budget, regulations, etc.
  We let then teams to be born, come with proposals and those who prosper, we boost even further, promoting the creation of spin-offs, that like life itself, is how organizations will perpetuate themselves.

- **How do we assign and control the budget they use?**
  In each initial meeting, this is when and where budget is assigned. It would be a good practice to set some thresholds, so teams can have autonomy up to a certain limit and these boundaries can then be increased or reduced, based on team previous success or failures to deliver. Transparent. Consequent. No drama.

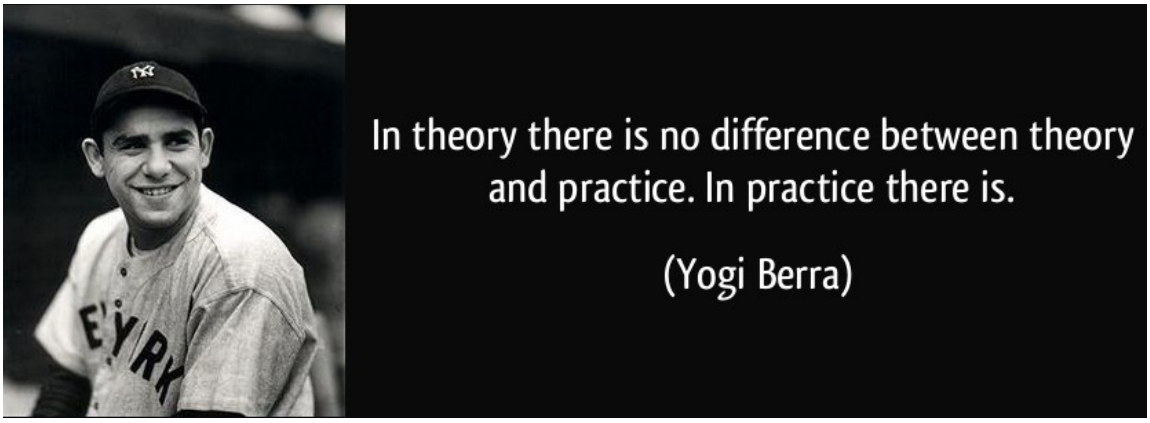
- **Should we plan as always and then let them use this "agile thing" for the execution?**
  "Planning is essential. Plans are useless." - Dwight D. Eisenhower
  We can always do some planning, as long as we use it as a rough roadmap and we always remember that plans are *hypothesis*. There is nothing wrong in planning and there is a lot of value in evaluating possible scenarios and the corresponding alternatives. But trying to use them later for a precise execution is a mistake from the past, only applicable when we do the same thing again and again.

- **What is the relationship with Continuous Integration / Delivery and DevOps?**
  CI/CD is the basis for any modern attempt to build a software system.
  Automation is fundamental, if we want our actions to be repeatable, auditable, testable, etc.
  DevOps is more a cultural aspect, about collaboration, transparency and a service-oriented mindset.
  All these aspects align nicely with Agile, Lean and ZenSum.

- **Is Design Thinking an alternative to Agile and Lean … or are they all complementary?**
  They are totally complementary, reinforcing each other.
  Design Thinking helps us to conceive and refine new solutions, concepts and ideas.

- **Are plans, estimations, deadlines and other similar concepts still valid? How?**
  More than the plans, it is the planning action that matters. A plan is just a base for a discussion. Estimations are also (like plans) hypothesis. This does not mean that they have no value. The fact that in the past they have been overused and reality was often forced to fit into pre-defined plans and estimations, does not mean they cannot be used properly. Have them as a rough approximation. Something to be verified in practice. The best possible value at this moment. Based on this, define a deadline short enough, to reduce risk down to a point where it becomes harmless. Respect deadlines. This is how time-boxed works.

- **What is the role of management?**
  ZenSum promotes and facilitates that traditional management based on planning and the corresponding control of its execution moves towards a model of leadership, based on a similar approach like seed and venture capital firms work. Even though this implies a different mindset, ZenSum offers concrete and clear events in order to approve, support and validate the different initiatives that the teams will propose.
  This means that by presenting the right challenges, agreeing on a reasonable cost/benefit decision with precise boundaries, constraints and timeline, then teams can have autonomy to deliver the promised results. Then leaders can apply and develop the concept of servant leadership, that is, helping, providing feedback and supporting the teams on their endeavors.



This guide has gone through many different points and as you may have noticed, through the different levels of detail with which the topics have been discussed, it is possible to go much further, in extension and depth, about Lean, Agile, ZenSum and more, including each of the concepts mentioned in **Fundamentals**.

Still, all this is just theory and even though it can be put into practice, it is the reality where each organization lives and how it adapts and survives through the different changes across time, what really matters. As it was said before, ZenSum is just a mean to achieve something and not a goal on its own.

Any organization that enforces (instead of promoting) the usage of ZenSum or any of the other elements described here, will be trying to use a new tool, with the old mindset. Results will be limited and very easily lost.

If you are not sure where to start, take into consideration the following alternatives:

Instead of giving orders, ask for help.

Instead of controlling activities, check the outcomes and the impact achieved.

Instead of being busy doing everything, ask yourself what is the only one, more important thing to do next.

Instead of building reports, build information radiators. Build Transparency.

Instead of trying to find a solution to each problem, try to think and visualize how the ideal situation would be.

Instead of making now a big project or attempt to get there, start small.

Instead of worrying about making every single effort a success, try many and let them fail or flourish.

Instead of worrying about those which did not work, focus on those which did. Grow from there.

As explained in **MOTIVATION**, the aim of ZenSum is to put together different Agile & Lean approaches that exist today, as well as providing a governance mechanism that is compatible with the underlying values and principles.

It is expected to be clear now, how Design Thinking, Kanban, Scrum and others can be used together and in which cases one may deliver more benefits than the other.

This full picture however, is not a dogmatic recommendation and everything described here is just a mean to deliver better results, with less effort, while developing our full potential. Lean, the most important concept on which ZenSum is based on, is not something fully formalized and it may never be. All the consequences and implications of something so simple as being truthful and consequent with our observations, are hard to imagine for those of us who are leaving behind a world of how things "should be", often pretending that reality can be distorted to fit in.

ZenSum is a contribution to an endless path that we need to make more and more clear, to avoid the fear, uncertainty and confusion typical of a paradigm change, like in any *interregnum*[1].

Peter Drucker used to say that knowledge workers should be treated as volunteers.

In this future of abundance that we can reach by making each effort meaningful, those who work only for money will not be able to compete with those who do something because they love it. Organizations prepared to work with the first group, will lose the second kind of workers; those who make organizations thrive.

Of course, the transition is not easy. More often than we may expect, even organizations using many of these principles are not fully aware of them. Old consulting firms that used to say "*agile is only for startups*" are now selling new recipes based on observations, without really understanding the underlying reasons.

Copying practices will not make a cultural change.

Developing soft-skills (even though important, of course) is not enough to become a leader.

Many misunderstandings can make us fail. But if we observe the facts, are honest to ourselves, ask for feedback and are thankful to those who give us hints on areas to improve, we will be on the right track.

Building a system where individuals can shine, teams thrive and organizations prosper, is not impossible.

We are still in a dark room, stumbling against different obstacles.

We hope ZenSum can help to bring a little bit of light.

We hope you will help others to make this light even brighter.

"UNLESS someone like YOU cares a whole awful lot, nothing is going to get better.

It's not."

- Dr. Seuss

[1] https://en.wikipedia.org/wiki/Interregnum