

Review Copy
Chapter 5
The Path to Leadership

PERSONAL AGILITY

Double Your Impact.
Perform with Precision



PETER B. STEVENS and MARIA MATARELLI

Review Copy



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- ❖ Chapter 6: Case Studies
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Chapter 5: The Path to Leadership

“Leadership is unlocking people’s potential to become better.”

— **Bill Bradley**

Key concepts

1. Clarity of Purpose
2. Achieving Autonomy *and* Alignment
3. Aligning with Stakeholders
4. How to be an Agile Leader
5. Achieving Results

“The most empowering condition of all is when the entire organization is aligned with its mission, and people’s passions and purpose are in sync with each other.”

— **Bill George**

How can you lead people without telling them exactly what to do? This challenge is faced by company leaders around the world as they begin to embrace agility in their organizations.

A practitioner of the Personal Agility System knows why they are doing what they are doing, not just what they are doing. How does Personal Agility apply beyond a single individual? Imagine your organization if everybody understood why they are doing what they are doing, and all the stakeholders agreed on the key initiatives and their importance!

Leadership is “a process of social influence in which a person can enlist the aid and support of others in the accomplishment of a

common task,”⁴ or, more fundamentally, motivating the people around you to follow your direction.

When we look at successful endeavors, we see that clarity of purpose, motivation, and engagement are key to this success. Alignment is a fancy word for “everyone understands what we are doing and why we are doing it.” Alignment is the holy grail of large organizations. “If we could only get everyone on the same page, pulling in the same direction...”

If the people doing the work are engaged, they will go the extra mile to achieve great things. When people feel aligned to a greater purpose, this increases their motivation. When they have autonomy, this leads to self-fulfillment. Many people believe autonomy causes chaos. How can you achieve both alignment and autonomy at the same time? Through clarity of purpose.

Often, our job as leaders is to understand the needs of our stakeholders or even, help them to better understand their needs. How do you help your stakeholders achieve clarity of purpose or even identify a common purpose that they can all agree on?

In this chapter, we will give you tools to achieve clarity of purpose. Given that an organization has multiple objectives, we’ll share tools on how to balance those against each other so your organization can achieve high performance instead of overloading itself. When you create alignment, you can be the agile leader that others want to follow.

I – Clarity of Purpose

Fifty some years ago, man from the planet Earth first set foot on the Moon. Two astronauts did the walking, and one person spoke the first words. But the effort was massive. It was probably the largest mobilization of a country’s resources for a peaceful purpose. Between NASA, the military, other government agencies and civilian

⁴ <https://en.wikipedia.org/wiki/Leadership>, extracted 26 Feb 2020

contractors, over 400,000 people were involved in the Apollo program.

How do you organize so many people to achieve such a seemingly impossible goal in less than a decade?

In 2019, Peter Stevens attended Starmus V in Zurich, Switzerland, the celebration of the 50th anniversary of the first Apollo landing where he listened to the stories told by astronauts, mission controllers and administrators of the US and Soviet programs to understand how the Space Race between the USA and the USSR was won.

The defining advantages were on the American side. President John F. Kennedy did not commit America to go to the Moon. He asked America to commit to sending a man to the moon and bring him safely back to Earth. There was one program with one goal, not several programs competing primarily with each other nor was the mission overloaded with unrelated objectives. Leadership was 100% committed, and the rest of the country followed suit.

Everybody involved in the program knew two things: 1) "We are going to the moon." 2) "It is not going to fail because of me." These two statements told everybody everything they needed to know about their role in the program. Clarity of purpose enabled good decision making at all levels of the organization.

Everybody understood what really mattered. Having a successful mission. There was one goal and a clear purpose.

Even the vendors weren't just delivering goods to a program, they were essential partners. For example, the seamstresses at ILC Dover knew how important their jobs were. "They may have had the most important job of all, frankly", said Basil Hero, author of the Apollo account, "The Mission of a Lifetime." As Neil Armstrong said, "Those space suits were mini spacecraft. You were one pin prick away from death. If those suits failed, that was it. You were done".

We often see a very different picture with organizations today. Instead of one mission and one goal, organizations and the

individuals in them have many goals, many managers, many things to do in parallel, and constantly changing priorities about what they should work on. It's difficult to care about or take responsibility for anything because the priority could change tomorrow, and that passion and energy will have been wasted.

This leads to people disengaging. They do what they have to do to keep their jobs, but anything beyond that is wasted energy.

How many people know how their work ties to the goals of the company or the satisfaction of their customers? Do they know what initiatives are important to the company, why they are important, or how many people are focused on achieving the goal of each initiative? We saw in Chapter 4 that multitasking kills performance, but if the company has many goals to achieve, how can they achieve them without excessive multitasking?

Personal Agility offers a way out. As always, the key question is, "What really matters?"

II –Achieving Autonomy *and* Alignment

"Control leads to compliance; autonomy leads to engagement."

— **Daniel H. Pink**

Daniel Pink wrote that the prerequisites for motivation are autonomy, mastery, and purpose in his book "Drive". Autonomy is the need to direct your own life and work. Mastery is the desire to develop your skills and purpose is the deeper why behind what you are doing. When people believe they are working toward something larger and more important than themselves, they are often more productive and engaged.

It is rare to see a person or organization focusing on just one thing. Musicians, Olympians, professional sports teams, and bodybuilders are all examples of the excellence that can be achieved through

focus when they do. We rarely see this type of dedication in organizations.

The Apollo program was very clear, but the Space Race was just one part of the larger US government. Companies today usually don't have just one goal either. How do you achieve alignment and autonomy while pursuing multiple goals? And how many goals can a company effectively pursue simultaneously?

The current situation we often see in organizations is that people are typically working on multiple projects simultaneously. Joe's manager gets a request like: "I need someone with Joe's skills" (and Joe may be the only person with those skills). "You can have Joe, but I need him 30% to support his current project." And so it goes. The people in the company get spread more and more thinly across multiple initiatives until it is not uncommon for people to be working on 5 or more projects at once. Everybody is really busy, but actual progress slows to a crawl.

Often, companies lack the tools to see and understand the impact of this overload, and leadership is unable to react appropriately.

Typical symptoms of excessive multitasking include projects that miss deadlines and compromise quality, which in turn causes defects and customer complaints that have to be addressed later, and the morale of the teams goes down. How could clarity on what really matters change this? Let's take "Sample.com" as an example.

Imagine a Priorities Map for the whole company. Sample.com's leadership agrees on which initiatives would, if successful, bring the most benefit and communicates that list to the whole company. Each initiative is a card in the "What Really Matters" column. These cards are ranked by strong prioritization. The topmost card is more important than the second card, which is more important than the third, etc.

For example, let's assume Sample.com has the following initiatives, and that this list is sorted by potential value (or other measure of importance):

1. Expand to the mobile market (“Mobile”)
2. Bring new product X to market
3. Bring new product Y to market
4. Upgrade system and network infrastructure
5. Upgrade existing product S to defend its market position
6. etc.

Why is Mobile the most important initiative? This needs to be both clear and agreed upon by the key stakeholders.

How do you avoid spreading your people and resources too thinly? Let’s add a simple rule to ensure the company focuses on the right things: A high priority initiative never waits on or shares people or resources with a lower priority initiative. Everyone can understand and apply this constraint to make the right decisions about how to allocate their time, people and other resources.

Here’s how it could work. Let’s assume that Sample.com has 10 teams, named Team A, Team B, Team C, etc. through Team J. Which teams are needed for expanding to the mobile market? Teams A, C, and D. Mobile gets those teams. Which teams are needed for bringing Product X to market? Teams B, E, and F. No conflicts arise, so Product X gets the teams. Which teams are needed for bringing Product Y to market? Teams D, G and H.

Uh oh. Both initiatives Mobile and Product Y need Team D. What happens next? One approach would have Team D divide their time between the two efforts. Or the leadership might arm-wrestle over the teams and depending on who is winning this month, the priorities and focus might shift from month to month or even week to week.

As we saw in the chapter on multitasking, either approach slows down both initiatives, increases the cost, time-to-market, and probability of failure. The agreement to focus first on the top priority initiative enables a clear decision to work on the mobile market.

What happens to Product Y? Either the company finds another team to substitute Team D -- maybe Team K could also do the job -- or product Y waits until all the necessary teams are available.

This simple approach ensures that the company a) is always focused on the top priority initiatives with the necessary energy, people, and resources and b) only takes on as many initiatives as they can effectively handle. The technical term for this is limiting Work In Progress or limiting WIP. Unlike a Kanban approach, which sets explicit WIP limits, this approach uses available skills and capacity to limit the WIP.

Some teams might not be assigned permanently to any one initiative, like maybe IT Support. By understanding the company's priorities, they can ask themselves, how can we best support the Mobile initiative? A shared understanding of what really matters enables anybody in the company to align with the goals of the organization.

Spotify pioneered a similar approach. They call the "What Really Matters" column "bets", they focus on these high priority bets, and they review these priorities at regular intervals.

The key here is to have a Work in Progress (WIP) Limit on initiatives. The high priority bets get the focus while other initiatives wait. It's a simple prioritization algorithm. If two bets need a person or resources, the higher priority bet gets them. A lower priority cannot take people or resources away from the higher priority initiative.

These clear priorities allow people to focus on these top initiatives with little interruption.

How does Sample.com achieve alignment and autonomy? By communicating the "What Really Matters" column, everybody knows what is important and why it is important. By understanding why, each member of the company can make decisions that support the key goals of the company. This is alignment.

The "What Really Matters" column is an enumeration of purpose. You create alignment by sharing what really matters. People can

make decisions about what to do and how to do it. This delegation of responsibility in the context of a purpose enables people to decide what is the right thing to do. This is aligned autonomy.

When you start, you may discover that “What Really Matters” is poorly understood or that there are many different visions coming from various parts of the organization. It is important to figure out what your stakeholders really want and build consensus around this vision.

III – Aligning with Stakeholders

“The key to successful leadership today is influence not authority.”
— **Kenneth Blanchard**

How do you figure out what really matters to your stakeholders?

The classic business definition of a stakeholder is anyone who has an interest in what you’re doing on a project. In the real world, a stakeholder is anyone who can helicopter into your project and completely toss out all the assumptions, plans and results prepared to date. For this reason, stakeholder management is essential to successful endeavors.

In our experience, stakeholder management is easiest when you and your stakeholders trust each other. When your stakeholders know that you are listening to them and understand them, they can have confidence that you can represent their interests moving forward.

How do you build trust with a stakeholder? Connect with them as a person and ensure you are on the same page. This can help with understanding the problem you’re trying to solve, establishing a stronger relationship, and most importantly, understanding the official and hidden agendas and motivations of the people involved.

Personal Agility Stakeholder Interview Canvas

Figure out what really matters to your stakeholders. Ask questions in the numbered order.

Who?	Why?	Desired Outcome
1. Stakeholder Note and if necessary confirm the person's Name, Function, Contact Details	3. Challenges and Impediments What are the main challenges to achieving these goals or desired outcome?	6. Definition of Awesome If I could snap my fingers, and all your wishes came true on this project, what would that look like?
8. What really matters? At the end of the day, what is most essential? (Summarize and confirm what you learned through questions 2-7)	4. Risks, Concerns, Fears What are your biggest concerns about achieving these goals?	7. Support How can I/we support you to make this come true?
2. Main Goals or Objectives What do you want to achieve through this project or collaboration?	5. Frustrations What causes you to bang your head against the wall?	9. What's next? What is the next thing that you need to do for this stakeholder (follow-up)?

The first step is to listen to what your stakeholders have to say. Listen for understanding, not to debate or convince. We often enter conversations wanting others to see our point of view. Ironically, the best way to get stakeholders to listen to you is for you to listen to them.

We created the Stakeholder Canvas to help you start a relationship with new customers or stakeholders. The Stakeholder Canvas provides a coaching approach to working with stakeholders. It's both a script for asking useful questions and a template for recording the answers. Listen to your stakeholders. Really listen to them. By understanding what really matters to them, you establish your credibility as a trusted partner.

Use this canvas to guide your conversations with your stakeholders about your collaboration or the project you are working on. We suggest planning 30 to 60 minutes for the interview.

The first column is related to who the stakeholder is, their main goals and objectives, and ultimately what really matters to them. The second column is related to their motivations. Risks and fears relate to emotional motivations looking forward and frustrations apply to emotional motivations looking backward. Challenges and impediments are about the actual problem to be solved or solution to be delivered, not about emotions. The third column focuses on the desired outcome.

While the columns are organized by theme, we recommend asking the questions in the numbered order. Note that we don't ask the "What Really Matters" question until later in the order of questions. Going through the thought process of the other questions first can help build context.

Coaching questions can be helpful to elicit better, more complete answers, e.g. "Is there anything else." or "Let me read this back to you; have I understood you correctly?" Sometimes it is helpful to vary how you formulate the question so that it resonates better with your interview partner.

Your overall goal is to design your activities around helping your stakeholders to master their challenges, reduce their fears, and eliminate their frustrations to achieve their optimal outcome. Your immediate goal is to demonstrate that you understand them and their desired outcome, and that you are focused on making it happen.

You may find it useful after the interviewee has answered each question to answer the questions yourself. They can understand you as well as you understanding them.

You can use the following as a script to lead your partner through the interview:

Introduction:

As you know, we are working to do _____.
Beyond that, my goal is to create an effective partnership between us, so that we can work together effectively with a minimum amount of friction. I want to focus on doing great things for you and your customers. To that end, I would like to understand you, your goals and your perspective.

1. Stakeholder - Confirm the person's name and contact information
2. Main Goals or Objectives - "What do you want to achieve through this project or collaboration?"
3. Challenges and Impediments - "What are the main challenges to achieving your goals or desired outcome?"
4. Risks, Concerns, Fears - "What concerns you about achieving your goals?"
5. Frustrations - "What problems keep coming up that cause you to bang your head against the wall?"
6. Definition of Awesome - "If I could snap my fingers and all your wishes came true on this project, what would that look like?"
7. Support - "How can I/we support you to make this come true?"
8. What Really Matters? - "From what I have heard you say, when push comes to shove, these three points are the most essential.... Have I understood you correctly?" Summarize and validate your understanding of the stakeholder's key concerns. If you are correct, you have an agreement about what really matters.
9. What's next? - What is the next thing that you need to do for this stakeholder (follow-up)?

What to do with the results?

When dealing with a large number of stakeholders, look for patterns and similarities or glaring differences. Use the information gleaned to guide your collaboration and the definition of your project goal.

A stakeholder (or the entity they represent) could become a column in your Forces Map. The top card would contain:

- A picture or icon of the stakeholder
- Their perspective on what really matters
- Their definition of awesome

Individual cards might correspond to specific goals, features or tasks to help them achieve their 'awesome' state.

Tips for interviewing stakeholders

By understanding who your stakeholders are, what their goals are, what their challenges, fears and frustrations are, as well as the optimal outcome and what help they need, you get a complete understanding of the situation at hand and can discuss constructively how to move forward.

Ask them these questions and listen to what they are saying. Take notes and read what they said back to them. Ask, “Is there anything else? Have I heard you correctly?” This gives both you and them confirmation that you have heard and understood the whole problem.

When can you share your perspective? After you have listened to them and gotten their confirmation that you have understood them correctly and completely, now you can bring in your inputs: “In my experience, I have found that this can also be an issue...” “Oh, that’s interesting. What can we do about this?” “Let’s have a conversation about that...”

There are a couple of things to avoid: selling, debating, or arguing. These activities might happen later, but they do not build trust. If you find yourself in a conversation where you are interrupting each other, or trying to get the other person to listen, then you need to listen more and talk less!

Building trust is not about convincing someone else on a direction or selling them on an idea (though trust building can be a selling technique). It’s about listening for understanding. Listening for understanding provides opportunities for deep learning and connection. Typically, if you don’t listen to others, they won’t listen

to you. When you stop to listen, that's when you really begin to connect.

At this point, you can formulate your purpose, enable autonomy while maintaining alignment, and you can understand your stakeholders and help them figure out what matters to themselves and the organization.

IV – How to be an Agile Leader

“Morale is a multiplier for velocity”
— Joe Justice

If you are a leader and want your organization to be agile, start with yourself. The best way to be agile is to begin being agile. Agility is a mindset, not a toolset, nor is it just a process to follow. When leaders themselves are agile, they set the tone for the entire organization. Personal Agility is a way to do that.

What does it mean to be agile? In 2001, seventeen leading software developers formulated the “Agile Manifesto” and started a movement. To paraphrase the opening lines slightly: We are uncovering better ways of doing what we do by doing it and helping others to do the same. Our highest priority is to satisfy the customer through early and continuous delivery of value.

It's about learning, collaboration and clarity of purpose.

An agile company learns quickly and effectively, collaborates effectively, and knows why they do what they do. So does an agile leader.

If you look for better ways yourself, share what you do with others, and learn from others around you, you are being agile. You are agile. It's about continuous learning and continuous improvement.

Today, many companies want to be more agile so they can build better products, respond better to changing marketing conditions, get to market faster, have higher performing teams, and ultimately, increase market share and earn more money. So the leaders tell

their IT people (and more recently their business people) to “be agile”. Use this tool, apply that framework. But neither the tool nor the framework make you agile. These were developed by people who are agile so they can do their work better. You can invite people to be agile but telling people to be agile is almost always counterproductive.

The most successful patterns we have seen are when leaders embrace agility; the spread isn’t purely top-down nor bottom-up, but is best described as viral. Top leaders and other influencers “dance the dance” and the rest of the organization follows.

Leading by example is key.

“I want to end each week with satisfaction, and start each week with confidence,” explains Walter Stulzer, Executive Director of Futureworks in Zurich. “All of our projects are managed somewhere. Agile projects have task boards, classical projects have traditional tools. But what about my work? What about the things I can’t delegate? I manage the things that aren’t projects with Personal Agility.”

Klemens Buob, CFO of Sisag AG started their agile transition by putting a Priorities Map on the wall in his office. There he managed his own work. More importantly, every time someone came to visit him, be that an employee, a supplier or a customer, they would see this new thing on the wall and ask questions. By explaining how he managed his own work, he was able to share ideas as well as his passion and energy. He gave people implicit permission and inspiration to try out the approach for themselves. When they started using a software tool, Trello, to visualize the work, it spread like wildfire in the company. All of a sudden, the agile way of working wasn’t strange, it was normal, and the company was able to move forward with it quickly.

When Sisag started applying other agile techniques, they were natural extensions of Personal Agility. Everyone understood easily why it was beneficial to themselves or the company. “The most important thing is that every few weeks, we get to consider what

brings value and what doesn't. We can then choose to do those things that bring value," explained Erich Megert, Chief Marketing Officer of the Board at Sisag AG.

As an agile leader, it is important to lead by example. Agile Leadership Coach and Trainer, Michael Sahota says you have to put the oxygen mask on yourself first before you can help others. Uncover better ways of doing what you do by doing it and helping others do it. Focus on continuous learning and improvement and empower your teams.

Truly embracing agility yourself can set the tone for your entire organization.

IV – Achieving Results

Transparency and Accountability are two key components of an agile approach. Clarity around what really matters is essential. If everything matters, then nothing matters. Leaders set this tone.

As we look back at Walter's company, he had several profound insights as he restructured everything.

"We accomplished everything needed to achieve our initial goals. Half of our ideas proved unnecessary, so we didn't do them. Compared to our previous unsuccessful attempt, we were able to achieve all of our goals with half the work in a quarter of the time. And the results are already visible in our finances!"

This was achieved through focus, clarity, and short iterations. The way they had operated over the previous several years was not getting them where they needed to go.

Results are best achieved by having a small number of initiatives running at the same time. When there are too many good things to work on, people get stretched too thin. This is also the problem that companies have. Projects running late and over budget - everyone is

running constantly, and no one has time for anything - everyone is at full capacity. (remember the multitasking problem).

In the next chapter, we will look at examples of people applying clarity of purpose to master a range of challenges, such as improving the overall quality of their life, balancing work and family life, graduating from college, building their career, launching a business, and increasing the market valuation of an existing business. It is incredible to see the many ways Personal Agility brings value to people's lives.

Thank you for reading!

What do you think? What resonates? What doesn't? Join the community to share your thoughts and ask us questions!



Please share your thoughts

so we can incorporate your thoughts in the final version of the book.

Thanks!

Peter and Maria