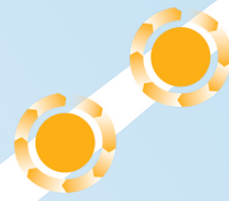


Version 2.0

Understand
the Direction or
Challenge



Establish
the Next Target
Condition

Experiment
Toward the Target
Condition



Grasp
the Current
Condition



PRACTICING BUSINESS AGILITY

Agile Kata



Agile Kata

Practicing Business Agility

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agilekata.org



Introduction

Originating in martial arts, a Kata involves deliberate, repetitive practice to master a form. In business the pattern of a Kata is foundational for continuous improvement. By implementing Kata, an organization can build new habits and skills to shift a corporate culture. Those foundational Kata, or forms if you will, are called the Improvement Kata and Coaching Kata and have their roots in Toyota manufacturing.

The Agile Kata is new and uses the two basic forms of Kata as its core to drive organizational change. But the Agile Kata extends the core of the original Kata by coupling the Agile Manifesto for direction with an agile leadership-style. Indirectly, this ties the Agile Kata with important topics like self-management, autonomous teams, value-based metrics, collaborative tools and techniques, and a fresh new look at the agile coaching stance.

Background

The goal of an Agile Kata is to increase agility. Increasing agility impacts (1) an individual, (2) a team, or (3) a larger group of people in an organization. All three situations have in common that they change people's behaviors and create new habits. The combination of learning something new, facing a unique situation in a company, plus working with people makes introducing agility a complex undertaking.

Probe-sense-respond is an appropriate technique to address complexity effectively, not cookie-cutter solutions or templates. For this reason, the Agile Kata uses the Improvement Kata as the core to probe-sense-respond and to provide a pattern to navigate through change. For over a decade, the Improvement Kata has been proven repeatedly and is the backbone in the Agile Kata. Improving agility requires a closer look at the definition of Agile as captured in the Agile Manifesto. The values and principles in the agile manifesto provide the direction for the Agile Kata but also make us mindful to continue applying those very values and principles WHILE we are executing an Agile Kata. What does that mean?

First, when agile values and principles are applied and lived-by during the transformation, the chosen process itself becomes agile. Based on our experience, most agile transformation processes are however not following an agile process. Responding to change over following a plan reminds us that the approach itself needs to be agile. Improvement may not have a clearly defined end-state from the outset of a change effort which is certainly true for achieving organizational agility. We might decide to stop with improving organizational agility, but that does not mean that we are done.

Secondly, the techniques and solutions we are using while executing the Agile Kata should portray the culture we want to create. For example, why would we expect a culture of self-managed and autonomous teams to emerge when we are running an Agile Kata in a command-control environment, with a top-down leadership style? Agile leadership and techniques that foster self-management, emotional intelligence, empowerment, and group collaboration become crucial ingredients when executing the Agile Kata.

On a high level, Kata and Agile are the two main ingredients for the Agile Kata. The purpose of this whitepaper is to introduce the Agile Kata, share experiences and to encourage people to try the Agile Kata. We are currently seeing three different applications for the Agile Kata which we would like to explore before we introduce the Agile Kata itself.

1. Agile Transformation
2. Organizational Improvement
3. Agile Teams

1. Agile Transformation

This Agile Kata is a pattern for guiding organizations on a macro-level through their agile transformation. Many companies are seeking to become more nimble to adapt to the ever-increasing speed of global markets. While the frequency of change may be often driven by evolution in the business world it can also be in response to new leadership styles which includes working in self-organized, autonomous teams. The Agile Kata addresses these needs and provides an approach for organizations to move toward full business agility. The Agile Kata uses goal-setting, action-taking and impact-measuring that helps leaders communicate and drive meaningful change. It is built on decades of experience in lean manufacturing, the agile movement and servant leadership.

2. Organizational Improvement

On a micro-level, the Agile Kata can help agile teams to drive continuous improvement efforts following a retrospective or as a response to an organizational impediment. Agile process frameworks like Scrum work great at exposing issues and to identify process improvement but leaves agile teams without guidance on how to effectively manage those issues and improvements. The Agile Kata can fill that gap by creating a parallel activity that makes organizational improvement concrete, transparent and measurable.

3. Agile Teams

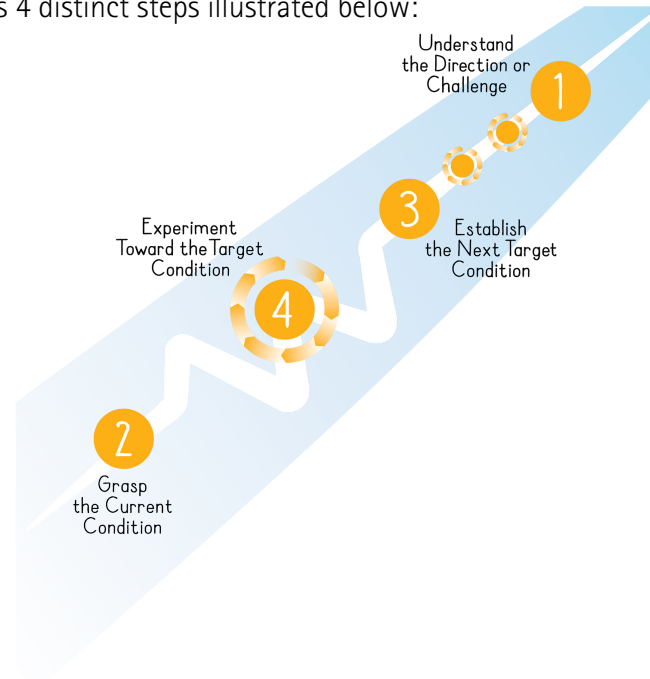
If we think about improvements in the most abstract ways, we could see a new product feature as an improvement to a product. In other words, not having a feature is a problem for a business and creating the feature solves the problem. Highly creative and self-managed teams can solve problems very effectively, so why not break a product development effort down into a set of problem statements or feature requests? The Agile Kata can serve as a very lightweight agile process for teams that enjoy freedom to experiment and self-manage at the highest level.



Agile Kata

The Core

At the core of the Agile Kata is the Improvement Kata which was published over a decade ago. The Improvement Kata contains 4 distinct steps illustrated below:



Practicing the Improvement Kata creates new habits over time and makes improvement measurable. The Improvement Kata is a commonsense pattern to any improvement effort. The first 3 steps are short planning activities, the 4th is focused on executing in an iterative approach.

1. Get the Direction or Challenge
2. Grasp the current condition
3. Establish the Next Target Condition
4. Conduct Experiments to get there

The direction or challenge is a step toward the defined vision which may guide the users similar to a north star. The challenge is more concrete than a vision and, as the term indicates, not necessarily easy or quick to achieve. One powerful part of the Improvement Kata is that there is a step dedicated to defining the current condition. How many teams just jump right into solution-finding or implementation without reflecting on where they currently are? Grasping your current condition requires a measurement. Without hard data, how would you know later that your improvement was effective? Once you know where you are, you can define where you would like to be next. In the Improvement Kata that is represented by establishing the next target condition. With the delta defined between where we are and where we want to be experiments can now be conducted. Experimentation can be a bumpy road but that indicates how creative the approach can be. An iterative approach to reflect on the experiments on a regular basis is a great way to do that.



The Agile Manifesto



The Agile Manifesto has given direction to our entire community since 2001. The agile values and 12 principles anchor practitioners of the Agile Kata deeply within it when determining for example the direction, current condition and next target conditions. The principles should set the tone when conducting experiments, e.g. "Build projects around motivated individuals. Give them the environment and support they need, and trust them to get the job done" or "Simplicity--the art of maximizing the amount of work not done--is essential".

The twelve principles of the Agile Manifesto are also used when measuring the current condition or the next target condition for example "Business people and developers must work together daily throughout the project." or "The most efficient and effective method of conveying information to and within a development team is face-to-face conversation". These are just examples of how the principles can be used to measure progress.

In terms of value, the Agile Manifesto takes a clear position favoring the left side of the value statements over the right such as in "Responding to change over following a plan". Measuring each value statement can be a challenge as they give the agile practitioners an orientation (left over right), but no tangible data points.

The principles behind the values, on the other hand, are easier to measure e.g. "At regular intervals, the team reflects on how to become more effective, then tunes and adjusts its behavior accordingly." Using this particular principle as an example, measuring the number of adjustments produces a valuable outcome, measuring how many times the team has reflected is only output. Agile coaches are used to focus on metric types that measure value, for example with Evidence-Based-Management (EBMgt).

EBMgt can help agile practitioners to focus on outcome- and impact-based metrics but in the context of the Agile Kata one of possibly many different tools. Focusing on value in general helps Agile Kata practitioners to concentrate on a few meaningful metrics to measure the effectiveness of the work.



Leadership and Coaching in the Agile Kata

In manufacturing the role of a coach is performed by the manager working directly with the learner who is a subordinate. That relationship is direct between two individuals. In Agile, we work in groups and promote an environment of self-organized and autonomous teams. An important difference as the following agile principle states "The best architectures, requirements, and designs emerge from self-organizing teams."



An agile coach, who upholds the Agile Kata and promotes agility meets in daily coaching cycles with the team to explore the following 5 coaching questions derived from the Coaching Kata. In the context of the Agile Kata "You" refers to the team, not one individual:



What is the Target Condition?
What is the Actual Condition now?
What one Obstacle are you addressing now?
What do you expect from your next step?
How quickly can we go and see what we have improved?

These questions should trigger a conversation within the team, facilitated by the agile coach so that the coaching cycle does not exceed 20 minutes in length. After the second question, the agile coach can also dig deeper with the team into the one obstacle the team is working on by asking 4 additional clarifying questions before returning to the questions above:

1. What did you plan as your last step?
2. What did you expect to happen?
3. What actually happened?
4. What did you learn?

During the coaching cycle, the agile coach and team reflect on the work by utilizing a Storyboard. The team will most likely require several experiments to address an obstacle, so an obstacle might be addressed over multiple daily coaching cycles.



Agile Starter Kata

There is no barrier or extra activity prior to starting with the Agile Kata; it can start at any time because it is not a start-to-finish methodology. Leaders seeking to use the Agile Kata for organizational improvement can benefit from performing an Agile Kata without disrupting existing processes, such as Scrum. The same is true for agile teams or agile transformations.

The Agile Kata can make teams focus on a discrete challenge without breaking existing development processes. The result of the Agile Kata though will impact existing processes but that is of course desirable as it leads to a higher degree of organizational agility.

Beside the timing, the Agile Starter Kata comes with a set of fundamental activities to warm up a new team to this new way of working. An experienced agile coach can help keep the team practice the basics before advancing the practice. Just like learning to dance, new dancers begin with basic step sequences before more complex ones are added. Focusing too little on the fundamentals or staying too long at the basics can both result in mediocre results of the Agile Kata. The agile coach will work with the team toward high-performance and will use Agile Starter Kata to kick off new teams.

Practicing the Agile Kata step-by-step based on its description is a great starting point. Focusing on a manageable challenge to begin with makes your first Agile Kata cycles even more straightforward.

Conclusion

The Agile Kata is a practice that is built on proven patterns well known in the agile, lean and leadership communities. The Kata intends to provide a language for everyone seeking help with agile transformations, organizational improvement and product teams. If repeated often, the Agile Kata can take organizations to higher levels of business agility and turn them into hyper-performing companies that are transitioning from responding to change to leading change.

Organizations applying the Agile Kata will notice individual and team empowerment, resulting in higher employee satisfaction and engagement which will in turn foster an agile culture. The Agile Kata itself is not prescriptive and leaves enough room and creativity for every company to include their own techniques.



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