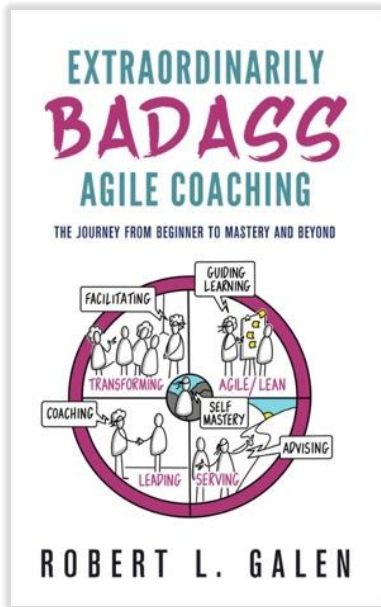


Extraordinarily Badass Agile Coaching Learning Journey



*Last updated: October 2023
Aligned with Agile Coaching Growth Wheel v3.3*

Introduction

Here we'll be exploring what we hope is a rich list of learning recommendations for rounding out your Agile Coaching Growth Wheel competencies. One of our focus points is balance. In a recent review of the Scrum Alliances learning materials for coaching programs, about 60-80% of the recommendations were focused towards professional coaching, which is only a small part (singular competency or stance) of the overall Wheel.

You can particularly see this focus in the Scrum Alliance CEC and CTC and the iCAgile coaching certifications. One of my hopes in writing the EBAC book, and in spending so much time on this appendix, is to inspire a more balanced competency skills set mix across our community of Badass Agile Coaches.

Feedback

If you have any feedback for this guide, please send it to bob@rgalen.com

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EBAC – Badass Learning Journey aligned with Agile Coaching Growth Wheel

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This reference set is aligned to version 3.3 of the ACGW guidance which can be found [here](#).



2023 Edition, version 3.3 of the Agile Coaching Growth Wheel, August 2023

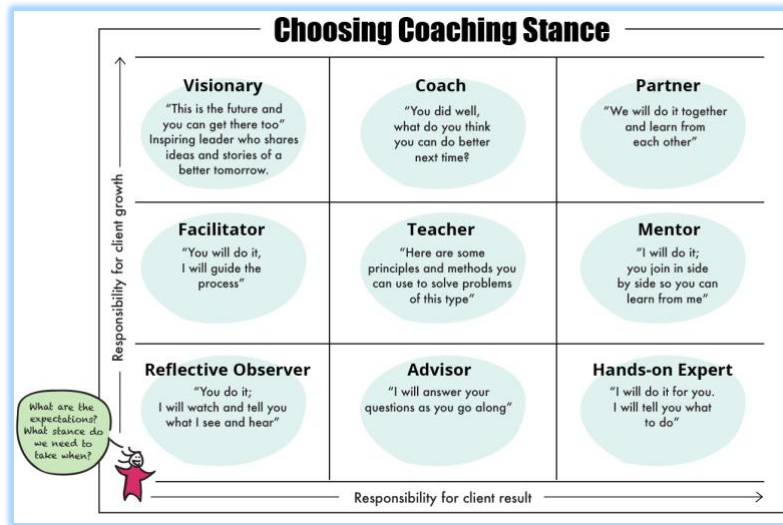
Note: As of January 2022, the Scrum Alliance announced their support for the ACGW [here](#). Version 3.3 is the first “complete” version of the Wheel with all of the competency evaluation examples and guidance in place.

ACGW Competencies

1. There are 9 Core Skill Competencies with each having competency components—
2. **Self-Mastery**
 - a. *Emotional Intelligence*
 - b. *Balance*
 - c. *Personal Transformation*
3. **Advising**
 - a. *Advising Mindset*
 - b. *Advising Skills*

- 4. Agile/Lean Practitioner**
 - a. Agile/Lean Mindset*
 - b. Frameworks and Practices*
 - 5. Coaching**
 - a. Coaching Mindset*
 - b. Coaching Skills*
 - 6. Facilitating**
 - a. Facilitation Mindset*
 - b. Facilitations Skills*
 - 7. Guiding Learning**
 - a. Learning Mindset*
 - b. Mentoring*
 - c. Teaching*
 - 8. Leading**
 - a. Visionary*
 - b. Role Modeling*
 - c. Leading for Growth*
 - 9. Serving**
 - a. Serving the Business*
 - b. Serving the Team*
 - 10. Transforming**
 - a. Organizational Change*
 - b. Organizational Design*
-

Mindset of the Agile Coach as...



<https://dandypeople.com/blog/agile-coaching-in-a-nutshell/>

Self-Mastery is the hub of the Agile Coaching Growth Wheel. And, as such, it serves as a central connection to all of the competencies with the Wheel. In other words, each competency has self-mastery as a foundational layer when operating within that competency.

That being said, when I think of Self-Mastery within the context of the ACGW, I also think about the unique *mindset* that each competency requires. It's not one mindset across all competencies, but unique aspects that emerge for each individual competency.

Below I wanted to explore what I think of as important mindset aspects for each of the primary coaching competencies—

Self-Mastery

- Checking ego lessness
- Checking coachability
- Checking self-awareness
- Checking community engagement
- Checking self-care
- Checking your continuous growth
- **Showing Up – Realizing that every other stance is grounded by YOU.**

Advising

- Sharing your deep experience.
- Speaking truth to power; showing up with Courage.
- Empathy; Walking in their shoes.
- Partnership; Co-create coaching agenda.
- **Showing Up – Sharing skin in the game.**

Agile/Lean Practitioner

- Deep AND Broad experience across methods & frameworks.
- A pragmatic approach unfettered by best practices or defined frameworks.
- Variant scaling experience
- De-scaling and Lean thinking experience
- **Showing Up – Continuously growing your agile/lean chops and open-minded support.**

Coaching

- ICF coaching mindset/presence considerations.
- Holding ethics.
- Leveraging Powerful and Clean questions.
- Powerful Listening, Discernment, and to the Emotional Field.
- **Showing Up – Staying in presence and revealing the system to itself.**

Facilitator

- Fostering deep democracy.
- Continuously holding up the mirror; revealing the system.
- All discovery, outcomes, and actions emerge from the group.
- Try to be invitation-based; leveraging open space dynamics.
- **Showing Up – Creating and firmly holding the space.**

Guiding Learning—Mentor

- Side-by-side; I'll show you, now you try it.
- Creating paired-partnerships; mentoring teams.
- Modeling as Mentor.
- Partnership; Co-create coaching agenda.
- **Showing Up – Establishing an accountability partnership in growth & learning.**

Guiding Learning—Teacher

- Meeting them where they are; yet, challenging conversations.
- Meet the variety of learners; TFTBOTR style and approach.
- Modeling as Teacher; showing and exemplifying.
- Creating the space to learn from each other.
- **Showing Up – Creating a collaborative learning space.**

Leading

- Leading by example; serving as a role model.
- Principles, ethics, positivity.
- Clarity of language; awareness of the power of language.
- Occasionally, Leading from the Front.
- **Showing Up – Revealing yourself to the system.**

Serving

- Building empathy – understanding of the business, stakeholders, customers, and leaders.
- Building empathy—understanding your team’s skills, strengths, diversity dynamics, motivations, and needs.
- Building self-awareness of your service-oriented mindset.
- Relentlessly finding opportunities to serve.
- **Showing Up – Becoming an empathy sponge—soaking up the system and serving it’s needs.**

Transforming

- Experience and stories around agile organizational structures.
- Experience and stories around moving from Project-to-Product oriented flow.
- Deep experience in change models and how to show up as a change.
- Serving as a visionary evangelist and confidence booster.
- **Showing Up – I’ve been here and done this, let me help you with options.**

Coaching, without Coaching

I’m more and more coming to the conclusion that my most powerful coaching stance is how I show up or my mindset as a coach. That is—

- My intentions,
- My principles and ethics,
- My presence,
- My role model, and
- My actions & inactions

Which includes what I applaud, what I tolerate, and what I challenge.

The point being, my privilege as an agile coach means that people are watching me...continuously. And what I DO matters so much more than what I SAY.

Directional interpretation of the Competencies

My friend and colleague Joel Bancroft-Connors has been doing a wonderful job contributing to the Agile Coaching Growth Wheel community project sponsored by the Scrum Alliance.

While I heavily referenced the ACGW in my EBAC book, I haven’t been paying detailed attention to its ongoing evolution.

One area I noticed the volunteer team added was to group specific competencies into categories of neutral versus active. And, when someone asked me about them, I hadn’t a clue as to what was intended. Here’s a question/answer dialogue that provides some additional context—

When asked—

What is meant by distinguishing between “neutral” and “active” competencies on the Agile Coaching Growth Wheel self-assessment guide?

Joel replied—

Neutral means you have no personal agenda. You are there to help the person, team or organization get to the objective they need, e.g. facilitation and coaching.

Active literally means you have skin in the game. You are actively giving advice, leadership guidance, and are involved in the process (almost like the old Pig & Chicken joke—you are invested). If your advice is bad, it reflects on you as well. Active is also a lot more about bringing your experiences and expertise to the subject/goal.

To be clear, in the Agile Coaching Self-Assessment, the high-level competencies in the Wheel are identified as—

- Active competencies:
 - Agile/Lean Practitioner, Transforming, Leading, and Advising
- Neutral competencies:
 - Serving, Coaching, Facilitating, and Guide Learning.
- Core competencies:
 - Self-Mastery

As I thought about those delineations, I struggled with the terms neutral and active as it related to Joel’s definition. Sure, it made sense to me, but I felt the terms didn’t communicate the nuance that I’m accustomed to in my coaching.

Leaning–in and Leaning–out

I want to offer an alternative to those terms.

I think that all of the competencies in the ACGW, with the exception of Self-Mastery, have a duality associated with them. I’ll define it as—

Leaning in—this is the active or skin-in-the-game aspect that Joel mentions. That is, if my stance is Coach as a Mentor, then I can Lean into that competency and actively partner with the client.

Leaning out—this is the neutral or independent aspect that Joel mentions. Again, if my stance is Coach as Mentor, then I can lean out from that competency and give my client more space and reduce or eliminate my own goals and agenda.

My point is, in one coaching conversation I can, and sometimes need to, lean-in AND lean-out of ANY competency or stance.

Top 25 List of Coaching Books for the Agile Coach

In no particular order, I thought I'd compile a list of coaching-centric (agile and otherwise) books that should be on a short reading list for the aspiring agile coach—

1. Coaching Agile Teams, Lyssa Adkins.
2. Agile Coaching, Rachel Davies & Liz Sedley.
3. Enterprise Agile Coaching, Cherie Silas, Michael de la Maza, and Alex Kudinov.
4. Professional Coaching for Agilists, Damon Poole & Gillian Lee.
5. Responsive Agile Coaching, Niall McShane.
6. Extraordinarily Badass Agile Coaching, me.
7. Agile Conversations, Douglas Squirrel & Jeffrey Fredrick.
8. Do Your Best Coaching, Laura Daley & Julie Hess.
9. The Heart of Laser-Focused Coaching, Marion Franklin.
10. The Coaching Habit, Michael Bungay Stanier.
11. The Advice Trap, Michael Bungay Stanier.
12. The Coach's Casebook, Geoff Watts & Kim Morgan.
13. Change, Simon Powers.
14. Coaching for Learning, Dion Stewart.
15. The Human Behind the Coach, Claire Pedrick & Lucia Baldelli.
16. Simplifying Coaching, Claire Pedrick.
17. Strengths-based Leadership Coaching in Organizations, Doug MacKie.
18. Co-Active Coaching, Henry Kimsey-House, Karen Kimsey-House, Phillip Sandhal & Laura Whitworth.
19. Coaching for Performance, Sir John Whitmore.
20. Who The F*ck Am I To Be A Coach?, Megan Jo Wilson.
21. Coach the Person, Not the Problem, Marcia Reynolds.
22. Humble Inquiry, Edward Schein & Peter Schein.
23. Appreciative Coaching, Sara Orem, Jacqueline Binkert & Ann Clancy.
24. Creating Intelligent Teams, Dr. Anne Rod and Marita Fridjhon.
25. Agile Reflections – Agile Coaching, me.

See the reference below for the meaning of the color coding...

Comparative Agility



Some of these resources have been replicated by Mark Summers and Bob Galen in the Comparative Agility, ***Agile Coaching Personal Improvement*** (PI) released in late 2021.

We're incredibly excited about coupling the Agile Coaching Growth Wheel to our new book and to the Comparative Agility PI.

<https://www.comparativeagility.com/product/personal-improvement>

While the Scrum Alliance has a learning assessment tool (spreadsheet), I feel that the PI is the absolute best way to—

1. Perform a baseline assessment of your coaching skills
2. Plan and execute your growth & learning
3. Reassess your growth and continued learning

Yes, I may be biased, but I strongly encourage you to learning more about Comparative Agility and the Agile Coaching PI assessment.

Now let's get down to learning!
Bob Galen, September 2023

BTW: as of September 2023, Mark and I are working on the next version (v2) of the assessment. It's an exciting update that will enhance your ability to leverage the assessment for your growth. It will be release mid to late October 2023...

Guidance – What to Read and When

Joel Bancroft-Connors has been an advocate of defining learning paths or journeys through the Agile Coaching Growth Wheel depending on—

- Your current skill level;
- Your current role or job; and
- Your interests.

I like the work he’s doing and you’ll want to put him on your future watchlist in this area. Primarily because the idea provides a lens to individualize and focus your learning journey.

In September 2023, Mark Summers and I were talking about it being a powerful extension to the ACGW work. That is, trying to provide some additional learning path guidance THRU the wheel.

To that end, I thought I’d color code some of the references, not all of them, to reflect where they might fall in your agile coaching learning journey. As you know, there are five skill levels defined in the Agile Coaching Growth Wheel—Beginner, Advanced Beginner, Practitioner, Guide, and Catalyst.

Learning Guide

Study for Beginner and Advanced Beginner

These references clearly fall into the “beginner” category from my perspective. I’ve color coded them this way. And there not just for the beginner. Sometimes, it’s nice to “revisit” the basics no matter how experienced you are.

Study for Practitioner

These references are a bit more advanced. They probably should be the first thing you read, but more so are part of your deeper dives into each competency.

Study for Guide and Catalyst

These are references that you want to wait to digest or sip slowly in your practitioner journey. I don’t want to say they’re all advanced. Instead, I’ve found them to inspire my individual competency development, but also my overall Self-Mastery.

Self-Mastery (the HUB of the Wheel)

Privilege, Diversity, and Inclusion

I think one of the most important things to consider as a coach is the nature and scope of your privilege. It's not something you "solve for" as a coach. Instead, it's something we should continuously be curious about and raise our awareness.

Related to this are the terms diversity, inclusion, bias, equity, and fairness. Watching this 5-minute video would be a helpful guide or reminder about becoming more self-aware of our privilege as we coach – <https://www.youtube.com/watch?v=g5gZ3PHYU3U>

While I'm not saying you have to become a DEI champion or evangelist as an agile coach, I believe you do have to increase your own self-awareness of these important topics as part of expanding your Self-Mastery. Here are a few resources to consider—

Minette Norman has written a book release as I update this document entitled—The Boldly Inclusive Leader, (2023). I think it goes beyond the leader and provides guidance for all of us to be more inclusive role models.

Tim Elmore has written a book entitled—A New Kind of Diversity, (2022). Tim brings in generational diversity awareness into our thinking as coaches, which to be honest, is something near and dear to my heart.

Tiffany Jana is someone to read and digest in the areas of bias and inclusion/exclusion. Tiffany & **Matthew Freeman** have written—Overcoming Bias. Tiffany & **Michael Baran** have written—Subtle Acts of Exclusion. Tiffany & **Ashley Diaz Mejias** have written—Erasing Institutional Bias.

Finally, **Mary-Francis Winters** has written—Inclusive Conversations: Fostering Equity, Empathy, and Belonging across Differences, (2020). Out of all the references in this section, I think this one is the most directly applicable for extending your coaching conversations.

Ethics

This is my own extension to Self-mastery. I feel that having a strong ethics connection is important to your awareness of and growth of self.

- **I recommend that all coaches develop their own ethics statement.** It's not the statement that matters most, instead it's going through the thinking practice of developing it that is most insightful. It's up to you whether you share it publicly or not. I've decided to share my [Agile Moose ethical statement here](#).
- Here are the current thoughts of the Agile Alliance working group on **Coaching Ethics** –
 - <https://www.agilealliance.org/resources/initiatives/agile-coaching-ethics/>
 - Shane Hastie is leading this effort, which I absolutely applaud! If you have read their work, you must. And I would encourage you to support Agile Alliance in their efforts!

- In what I personally an **exemplar** for our agile coaching profession, here are the ICF Ethics work – <https://coachingfederation.org/ethics/code-of-ethics> And notice that there is a pledge step in the ethics where coaches must confirm their intention to support them. This is reaffirmed every time you renew your ICF certifications.
- Interesting thoughts on ethics by **Mishkin Berteig**
 - <https://berteig.com/general/agile-coach-code-of-ethics/>
- Here’s an article called **Just Saying It**, as in just having ethics statements or saying it, doesn’t make it so. It takes vigilant and courageous action!
 - <https://www.agile-moose.com/blog/2020/7/30/just-saying-it>

Emotional Intelligence: Self-awareness, Self-regulation, and Systems Impact

I think of self-mastery as encompassing—coaching mindset, presence, professional development, the essence of who you are as an agile coach. It’s a part of each of the stances and grounds them all. In fact, I think self-mastery (mindset) can be a bit different when activating each of the stances. So, there’s a depth and nuance to the idea. Finally, it’s the HUB of the Wheel. It’s that important.

- I thought I’d lead this section with **a small set of books that are helpful from an EQ perspective**—
 - Leading with Emotional Intelligence: In the Age of Automation, Robotics, & AI, **Kevin Mann**, (2022).
 - Connect through Emotional Intelligence, **Mike Acker**, (2021).
 - Emotional Intelligence, **Brandan Goleman**, (2019).
 - Emotional Intelligence: Why It Can Matter More than IQ, **Daniel Goleman**, (2006).

While there are many, many, many **EQ assessments** online, both free and paid, I think this free version is a good place to begin - <https://www.ihhp.com/free-eq-quiz-old/good-eq/>

- **Jon Kabat-Zinn** has written a wonderfully short book about **Mindfulness**. It’s a practice that you might find useful in your self-mastery journey’s.
 - Mindfulness for Beginners: Reclaiming the Present Moment—And Your Life, (2012).
 - <https://www.agile-moose.com/blog/2019/4/7/the-agile-monk>
 - <https://www.agile-moose.com/blog/2020/1/2/support-systems>
- Bob can’t encourage everyone enough to get a personal coach. But two aspects of that are **being coachable and practicing your craft**. Here are a couple of articles around that notion.
 - <https://www.agile-moose.com/blog/2019/6/23/everyone-needs-a-coach>
 - <https://rgalen.com/agile-training-news/2018/6/23/the-first-rule-of-agile-coachingbe-coachable>
 - <https://rgalen.com/agile-training-news/2020/8/29/were-talking-aboutpractice>
- **Dreaming and your Ikigai** – Doing what you love, can be a powerful motivator.
 - <https://www.agile-moose.com/dreaming>

- **Being Yourself; Being Authentic**
 - <https://www.agile-moose.com/blog/2019/6/23/bringing-and-being-ourselves>
 - <https://www.agile-moose.com/blog/2020/2/17/elastic-authenticity>
 - <https://www.agile-moose.com/blog/2020/7/30/just-saying-it>
- I've found that considering and being mindful of your **Legacy** can be a powerful reflective tool.
 - <https://www.agile-moose.com/blog/2019/4/7/what-is-your-legacy>
 - <https://www.agile-moose.com/blog/2020/9/28/some-things-are-more-important-than-agile>
 - <https://www.agile-moose.com/blog/2020/7/17/exploring-resilience>
- **Reflection should become one of your Superpowers!**
 - <https://www.agile-moose.com/blog/2020/7/17/the-power-of-personal-reflection>
 - <https://www.agile-moose.com/blog/2020/6/23/super-powers>

Balance

Are you taking care of...you; is the first question. But it also connects to your perspectives, views, and alignment in and across your organization. For example, are you too skewed towards one methodology or scaling framework? Or, are you too focused on your teams—doing it by the Scrum Guide book? As an agile coach, I believe you have a responsibility to continuously seek the balance in yourself and in your coaching.

- **Bob has developed a coaching Self-care Canvas that he's discovered helps to focus us, well, on ourselves.**
 - Canvas – <https://www.dropbox.com/s/0bgdiqvagblev5u/Agile%20Coaching%20Self-Care%20Canvas.png>
 - WIP Limit Check – <https://www.dropbox.com/s/6awzm9e153d99xt/Self-care%20WIP%20Limit%20Check.pdf>
 - Coaching Agile Journeys, Coaching Self-care Fireside Chat video - <https://www.youtube.com/watch?v=Xh4eRsWd0DE&t=90s>
- **Balance is important**
 - <https://rgalen.com/agile-training-news/2020/4/10/the-myth-of-limitless-energy>
 - <https://rgalen.com/agile-training-news/2018/7/17/work-balance-matters?>
- **Balance in Agile Adoption**
 - <https://rgalen.com/agile-training-news/2021/10/9/the-balancing-act-of-agile-adoption>
- **Balance between Agile-centric and Business or Leader-centric**
 - <https://rgalen.com/agile-training-news/2020/6/20/oh-maurice>

Personal Transformation

I consider this the inside-out view of your agile coaching journey. I've long been a proponent for coaches creating an agile journey mindmap that they regularly maintain as a guide for their growth, development and transformation.

<https://www.agile-moose.com/blog/2022/1/13/the-art-and-craft-of-journey-mapping-with-mindmaps>

- A CLASSIC book in this space is **Stephen Covey's 7-Habits**. It was first published in 1990 and it's as relevant for personal transformation now as it was then.
 - 7-Habits of Highly Effective People, (30th Year Edition, 2020).
 - The 8th Habit: From Effectiveness to Greatness, (2004).
- I talk quite a bit around letting go of our baggage as coaches. That experience is a two-edged thing. Valuable, but at the same time, it can negatively influence our open-mindedness, sensing, and responding with clients. **Barry O'Reilly** has written a wonderful book that looks at the value of unlearning.
 - Unlearn: Let Go of Past Success to Achieve Extraordinary Results, (2018).
- Speaking of "letting go" of the past, **BJ Fogg** has written a wonderful book (Tiny Habits) on creating (changing) habits. And **James Clear** has written a similar book (Atomic Habits) on the same topic. I'd recommend reviewing one or both of them for a wonderful way to change yourself.
 - Tiny Habits: The Small Changes that Change Everything, (2019).
 - Atomic Habits: An Easy & Proven Way to Build Good Habits * Break Bad Ones, (2018).
- There is a boldness, an honesty, and a clarity of communication component that you need to build as a coach. **Kim Scott** and her radical candor work is not only relevant to leaders, I believe it's even more relevant for agile coaches. While many perceive they have the ability, in my experience so many do not. And as in anything, it's a practiced skill. So, work on practicing radical candor with courage.
 - Radical Candor: Be a Kick-ass Boss Without Losing Your Humanity, (Revised edition: 2019).
- Positivity is something that I've become intensely interested in over time. When I think of Positive Psychology, **Martin Seligman** immediately comes to mind. I'm not suggesting to you as a coach to study the depth and breadth of the entire field. But more so to consider aspects of it from a personal mindset perspective and from a flourishing perspective. To that end, Flourish is a great beginning.
 - Flourish: A Visionary New Understanding of Happiness and Well-being, (2011).
- **Andy Crouch** has also written a book that looks at flourishing. I'd add it to your understanding of positive psychology.
 - Strong and Weak: Embracing a Life of Love, Risk and True Flourishing, (2016).

- I often look for folks in the agile community who I respect their experience and perspective, but who also disrupt my thinking. In a very positive, growth-oriented way. **Daniel Mezick** is one of those voices for me. But one of the largest influencers of mine is **Tobias Mayer**. I experienced it in his revolutionary Scrum book and in nearly everything he writes. I highly recommend getting to know Tobias and finding your own “disruptors”.
 - The People’s Scrum: Agile Ideas for Revolutionary Transformation, (2013).
 - His Agile Anarchy blog (ended in 2017) – <https://agileanarchy.wordpress.com/>
 - Current blog – <https://tobiasmayer.medium.com/>

Personal Leadership

- **Karen and Henry Kimsey-House** have written a wonderful book that explores leadership from a co-active (coaching, principles, mindset) perspective. I found their five ways (stances) to lead as a powerful reminder for me.
 - Co-Active Leadership: Five Ways to Lead, (2021).
- **Edward A. Schein and Peter A. Schein** have extended their amplification of humility into leadership. Quite a righteous focus if you ask me.
 - Humble Leadership: The Power of Relationships, Openness, and Trust, (2018).
- I think it’s worthwhile to continuously center on Servant Leadership in your personal leadership journey and there’s no better way than studying **Robert Greenleaf’s** work on the subject.
 - Servant Leadership 25th Anniversary Addition: A journey into the Nature of Legitimate Power & Greatness, (2002).
- While I think quite highly of **Brené Brown**, my daughter Rhiannon is a true fan. Given that, there was no way I/we could have left her out of this appendix.
 - Dare to Lead: Brave Work. Tough Conversations. Whole Hearts., (2018).
 - Also, must viewing are her various TED talks.
- I would recommend reading my **Agile Reflections for Agile Leaders** compilation e-book as part of your journey. It contains over 60 articles on a wide variety of leadership topics.
 - The easiest way to get a copy is on LeanPub - <https://leanpub.com/agilereflectionsforagileleaders>

Agile / Lean Practitioner

Agile / Lean Principles

Clearly, this is the baseline for your coaching. If I were to amplify the two most foundational competencies for your agile coaching journey, it would be Agile/Lean Practitioner and Self-Mastery. Those two interweave all of the other competencies and you must be growing and evolving them over time. In this particular case, it's the "principle-side" of the equation.

- Read the **Agile Manifesto** about 10x, including the 12 principles. Now, for each of the principles, reflect on how they impact you, your coaching, and your clients?
 - <https://agilemanifesto.org/>.
- **Jim Highsmith** has been a stalwart in the agile community since the very beginning. Recently he wrote a book that is more of a historical memoir of the agile software development movement. Understanding where we've come from and our journey is of paramount importance for every agile coach.
 - Wild West to Agile, (2023)
- **Craig Larman** wrote a cross-methodology treatment in 2003 that provides a wonderful overview of all of the methodologies that evolved into our Scrum and Kanban world of today. Again, I think this historical perspective will provide a useful baseline of understanding.
 - Agile & Iterative Development: A Manager's Guide, (2003).
- While they may be a bit dry and slow to read, **Mary & Tom Poppendieck's** works are a treasure trove of information about Lead Software Development.
 - Lean Software Development – An Agile Toolkit, (2003).
 - Implementing Lean Software Development – From Concept to Cash, (2006).
 - Leading Lean Software Development – Results are Not the Point, (2009).
 - The Lean Mindset: Ask the Right Questions, (2013).
- **Eric Ries'** work was (and IS) truly ground breaking when it was first published. It's a must-read book in our agile space.
 - The Lean Startup – How Today's Entrepreneurs Use Continuous Innovation to Create Radically Successful Businesses, (2011).
 - The Startup Way: How Modern Companies Use Entrepreneurial Management to Transform Culture and Drive Long-Term Growth, (2017).
- **Gene Kim** has written a set of books that are variations on Eli Goldratt's, The Goal—
 - The Phoenix Project: A Novel about IT, DevOps, and Helping Your Business Win, (2018).
 - The Unicorn Project: A Novel about Developers, Digital Disruption, and Thriving in the Age of Data (2019).
- **John Turner, Nigel Thurlow, and Brian Rivera;**
 - The Flow System: The Evolution of Agile and Lean Thinking in an Age of Complexity, (2020).

- **Taiichi Ohno** the architect of the just in time Toyota production system, so his thinking is laid out in—
 - Toyota Production System: Beyond Large-Scale Production, (1999).

Agile Frameworks, Methods + Practices

An in this case, it's the practices side of the equation. There's a strong emphasis here on Extreme Programming, Scrum, and Kanban. Also, some immersion into scaling frameworks.

- **Kent Beck** wrote the definitive book on Extreme Programming. It's gotten lost over time as Scrum and Kanban have taken over. But the practices are gold. He also either wrote or contributed to many other books. One of my favorites is the planning book he co-authored with **Martin Fowler**.
 - Extreme Programming Explained – Embrace Change (2nd edition, 2004).
 - Planning Extreme Programming, (2000).
- **David Thomas & Andrew Hunt** wrote the Pragmatic Programmer in 1999. At the time, I remember it changing my world view as a software developer. They were also signatories of the Agile Manifesto.
 - The Pragmatic Programmer: your journey to mastery, 20th Anniversary Edition (2019).
- Read the **Scrum Guide**. Better yet, contrast the pre-2017, 2017, and 2020 Scrum Guide editions to see how it has evolved over time.
 - <https://scrumguides.org/>
- While not widely referenced, still my favorite book on Scrum was written by **Henrik Kniberg**. He originally published it as a free resource around 2005. I still find it to be a wonderful guide to the “spirit” of XP and Scrum.
 - Scrum and XP from the Trenches: How we do Scrum (2007, 2015).
 - Kanban and Scrum: Making the Most of Both, (2009).
 - Lean from the Trenches: Managing Large-scale Projects with Kanban, (2011).
- There is a myriad of books written on Scrum. Ken Schwaber, Jeff Sutherland, Kenny Rubin, and Mike Cohn are some of my favorite authors with multiple books. If I had to recommend a singular book to you on Scrum, it would be **Mitch Lacey's** book because of its completeness. That being said, it's a bear in size.
 - The Scrum Field Guide: Agile Advice for Your First Year and Beyond, (2nd edition, 2015).
- **Barry Overeem's** 30+ page white paper / article on Scrum.org that explores the 8-Stances of the Scrum Master is an excellent place to begin.
 - <https://www.scrum.org/resources/8-stances-scrum-master>
- **Geoff Watt's** has written a few great books on specific roles within Scrum.
 - Scrum Mastery – From Good to Great Servant Leadership, (2nd edition, 2021).
- **Jim Coplien's** work on organizational patterns influenced Jeff Sutherland and Ken Schwaber when they were creating Scrum. There are lots of great patterns described in here.

- Organizational Patterns of Agile Software Development, (2004).
- **David J. Anderson** is the father of the Kanban in software movement and his book is still the seminal work on the subject.
 - Kanban: Successful Evolutionary Change for Your Technology Business, (2013).
- It's really helpful for coaches to have so called maturity models to assist them in evaluating where teams and organizations stand. **David J. Anderson** developed the Kanban Maturity Model and I've found it quite useful in understanding and guiding Kanban organizations.
 - Kanban Maturity Model: A Map to Organizational Agility, Resilience, and Reinvention, (2020).
- I'm hard-pressed to discover a Kanban coaching (or process guide) book that I would recommend. However, **Klaus Leopold** is a European Kanban coach who is incredibly well respected. He's written a nice book focused on the practice of Kanban.
 - Practical Kanban: From Team Focus to Creating Value, (2017).

Scaling Practices—Scrum of Scrums, SAFe, LeSS, Scrum@Scale, and Nexus

- **Anthony Mersino** runs Vitality Chicago and has posted some excellent treatments of agile scaling frameworks.
 - 2020 Trends in Scaling Approaches – <https://vitalitychicago.com/blog/beyond-safe-trends-in-agile-scaling-approaches-2020/>
 - Disciplined Agile – <https://vitalitychicago.com/blog/pmi-is-quietly-killing-disciplined-agile/>
- **Jutta Eckstein** has been exploring agile scaling since before any of the scaling frameworks emerged. She's deeply experienced into scaling success patterns in a very agnostic way. Jutta's work is a great place to begin before you get enamored with a specific scaling framework.
 - Agile Software Development in the Large: Diving into the Deep, (2004).
 - Agile Software Development with Distributed Teams, (2010, 2022).
 - Company-wide Agility with Beyond Budgeting, Open Space, and Sociocracy, (2020) also known as the BOSSA.nova book.
- **Maruti Techlabs and Mitul Makadia** have created a reference site about the details of the **Scrum of Scrums** pattern.
 - <https://marutitech.com/guide-to-scrum-of-scrums/>
 - And my own thoughts around the Scrum of Scrums – <https://rgalen.com/agile-training-news/2016/11/9/what-is-a-scrum-of-scrums>
- **Dean Leffingwell** is one of the fathers of the Rational Unified Process (RUP) and now the father of the Scaled Agile Framework of (SAFe). If you're into historical analysis, it might be worth studying RUP and its similarities to SAFe. Dean
 - Scaling Software Agility: Best Practices for Large Enterprises, (2007, pre-SAFe).
 - SAFe website - <https://scaledagileframework.com/>

- **Craig Larman and Bas Vodde** are the co-creators of the Large-Scale Scrum (LeSS) family of scaling approaches.
 - *Scaling Lean & Agile Development: Thinking and Organizational Tools for Large-Scale Scrum*, (2008).
 - *Practices for Scaling Lean & Agile Development: Large, Multisite, and Offshore Product Development with Large-Scale Scrum*, (2010).
 - *Large-Scale Scrum: More with LeSS*, (2016).
- **Jeff Sutherland** created **Scrum@Scale** as another scaling framework. To be honest, it's probably my favorite framework because of how lightweight it is—leveraging basic Scrum as the foundation for scaling.
 - Scrum@Scale Guide - <https://www.scrumatscale.com/scrum-at-scale-guide/>
- **Gereon Hermkes and Luiz Quintela** have written a wonderful book that explores Sutherlands Scrum@Scale in detail.
 - *Scaling Done Right: How to Achieve Business Agility with Scrum@Scale and Make the Competition Irrelevant*, (2020)
- **Kurt Bittner, Patricia Kong, and Dave West** have written the definitive (only) book that explores the Nexus scaling framework by **Ken Schwaber** and Scrum.org.
 - *The Nexus Framework for Scaling Scrum*, (2017).
 - Scrum.org reference – <https://www.scrum.org/resources/scaling-scrum>
- **Spotify**, as much as I'd like to skip Spotify as a scaling framework, it has become somewhat of a standard pattern when scaling. I'd suggest reading **Anthony Mersino's** article as a backdrop for your research.
 - <https://vitalitychicago.com/blog/there-is-no-spotify-model-for-scaling-agile/>
- **Em Campbell-Pretty and Adrienne Wilson** have written a book that explores the dynamics of Agile Release Trains (or ARTs) in SAFe.
 - *The ART of Avoiding a Train Wreck*, (2019)

Advising

Advising Mindset

From a mindset perspective, one of the first things you have to understand is that you have to “earn the right” to give advice. Sure, that’s a component of the depth and breadth of your experience and your ability to share it. But at another level, it begins with your building a relationship of partnership and trust with your clients. Trust in your intentions, trust in your expertise, trust that you have their goals in mind, and trust that you’ll be candidly honest with them. This level of trust takes time to build.

- See **Peter Block** reference under Advising Skills.
- **Relationship building** is one of those things that takes time and experience. One aspect of it is “meeting your client where they are”. This is one of Kanban’s principles and is worth studying in more details.

This article by **Joel Bancroft-Connors** focuses solely on aspects of relationship building as a coach. He places a strong emphasis on observation as a KEY to effectively building client relationships.

- <https://www.agileconnection.com/article/building-team-relationships-agile-coach>
- **Alignment** is one of those things that is hard for folks to figure out. I have 3 ideas / tools to share with you in this area.
 - **Jason Little** is, in a word, to little known. His lean change book is one of my most read and applied. I guess what might be the problem is that the book and his advice is so simple that it’s easy to discount it. Please don’t.
 - Lean Change Management: Innovative practices for managing organizational change, (2014).
 - Change Agility: A guide to help you think about change management differently, (2020).
 - **Blogs** I’ve written in this area include:
 - <https://rgalen.com/agile-training-news/2017/12/28/festivus-a-technique-for-achieving-leadership-alignment>
 - <https://rgalen.com/agile-training-news/2020/8/28/a-coaching-alignment-story>
 - <https://rgalen.com/agile-training-news/2018/12/11/building-a-first-team>
 - **Gustavo Rizzetti** has created a Culture Design Canvas that can be used to identify current organizational culture, future culture, and even misalignment across clients around their ideas/intentions on culture. It’s a wonderful tool in that respective.
 - <https://www.fearlessculture.design/canvas>

- There is a boldness, an honesty, and a **clarity of communication** component that you need to build as a coach. **Kim Scott** and her radical candor work is not only relevant to leaders, I believe it's even more relevant for agile coaches. While many believe they have the ability, in my experience many do not. And as in anything, it's a practiced skill. So, work on practicing radical candor with courage.
 - Radical Candor: Be a Kick-ass Boss Without Losing Your Humanity, (Revised edition: 2019).
- And related to Radical Candor is another book that offers even more of a tool-set around effective conversations. It's Crucial Conversations by **Joseph Grenny, Kerry Patterson, Ron McMillan, Al Switzler, and Emily Gregory**. It contains more breadth and depth around initiating high-quality conversations. The authors have also written a companion book around how to improve your confrontations entitled Crucial Confrontations, which explores those riskier, more potentially emotional and heated conversations.
 - Crucial Conversations: Tools for Talking When Stakes are High, (Third Edition: 2021).
 - Crucial Confrontations: Tools for Resolving Broken Promises, Violated Expectations, and Bad Behavior, (2004).
- This **Center for Creative Leadership** article contains 3 keys for communicating with leaders and 5 tips for being more effective. While it's short, the lessons are quite powerful.
 - <https://www.ccl.org/articles/leading-effectively-articles/communication-1-idea-3-facts-5-tips/>
- **Daniel Mezick** is one of the thought leaders in the inviting leadership movement where leaders invite versus tell or prescribe their teams to try agile approaches. He often speaks to the “power of an invitation”. He's also written about Open Space Agility, which leverages open space for organizational change. You need to become familiar with Dan's work and the implications for your coaching.
 - The Culture Game – Tools for the Agile Manager, (2012).
 - The Open Space Agility Handbook, (2015).
 - Inviting Leadership: Invitation-Based Change in the New World of Work, (2018) written with **Mark Sheffield**.

Advising Skills

Advising skills have a strong relationship or connection to your Agile / Lean Practitioner, Transforming, and Leading skills. So, please don't view it as an independent competency. If I can make a bold recommendation, Jerry Weinberg's and Peter Block's work are a wonderful place to begin.

- **Gerald 'Jerry' Weinberg** is one of the greats in our software development culture. And he rarely gets enough praise for all of his contributions, for example, his ~50 books. If you're looking to find a literary mentor, I'd recommend starting with Jerry's work. Speaking of which, I consider his two books on giving consulting advice to be priceless.
 - The Secrets of Consulting: A Guide to Giving and Getting Advice Successfully, (1986).
 - More Secrets of Consulting: The Consultants Tool kit, (2001).

- Another seminal work in this area is by **Peter Block**. His guidance around consulting in general is highly regarded and this book is in its 3rd edition; a testament to the value.
 - Flawless Consulting: A Guide to Getting Your Expertise Used, (3rd edition. 2011).
- **Edgar H. Schein's** work cross-cuts leadership, coaching, and consulting. And the core ideas and concepts are interwoven as well. That being said, I love the focus on humble things and recommend that you become familiar with Schein's work in general.
 - Humble Consulting: How to Provide Real Help Faster, (2016).
- **Shaun Bradshaw and Bob Galen** recorded a set of videos that were entitled Essential Patterns of Successful Agile Transformations. Many of the patterns are focused on partnering with organizational leaders, so there may be some useful information contained within them.
 - Part-1: <https://vimeo.com/509754708>
 - Part-2: <https://vimeo.com/514283044>
- One of the topics that we rarely get into with coaching our clients, whether they be individuals, teams, systems, or leaders, is the notion of **Metrics**. Particularly around how the coaching is landing.
 - Agile Leadership-oriented Metrics (partially pun-intended) - <https://www.agile-moose.com/blog/2019/5/13/effectively-measuring-agile-leaders>
 - Indications of Agile Done Well - <https://rgalen.com/agile-training-news/2019/12/8/indications-of-agile-done-well>
 - Happiness Metrics - <https://rgalen.com/agile-training-news/2016/2/20/are-you-happy>
- **Chris Voss** has written one of the best works on negotiation skills. I know, it doesn't seem to fit into agile coaching, but I believe it does. Particularly while providing Advice.
 - Never Split the Difference: Negotiating as If Your Life Depended on It, (2017).

Coaching

Coaching Mindset

When I think of my agile coaching mindset, I consider terms like—Meta-skills, presence, deep listening, staying in the moment, holding the client’s agenda and holding the client as fully capable. I also think of service orientation in that I’m always focused on my coaching serving the client and their agenda.

- Bob has collated a collection of his blog posts on **Agile Coaching** into a collection under the Agile Reflections title. You can find it—Agile Reflection on Agile Coaching, Edition 2 in our REPO.
 - [EBAC – Materials Repo](#)
- One of the VERY BEST ways to gather, establish, refine, and hone your agile coaching mindset is reading the thoughts of other agile coaches and practitioners. To that end, you can find the series of **Best Agile Articles** from 2017, 2018, 2019, and 2020 in our REPO. There’s also the **Agile Coaching – Wisdom from Practitioners**, (2017) available as a free e-book.
 - [EBAC – Materials Repo](#)
- It’s almost a must read to review the International Coaching Federation, **ICF Core Competencies and the Ethics**.
 - <https://coachingfederation.org/core-competencies>
 - <https://coachingfederation.org/ethics/code-of-ethics>
- **Doug Silsbee** is a coach that I stumbled on his work quite a few years ago. It was never mainstream, whatever that means, but I found it to be meaningful when forming (still forming) my agile coaching mindset. Doug’s focus is on Presence-based Coaching and Leadership and Mindfulness. I can’t recommend his work highly enough for you to refine your internal agile coach.
 - Presence-Based Coaching – Cultivating Self-Generative Leaders Through Mind, Body, and Heart, (2008).
 - The Mindful Coach: Seven Roles for Facilitating Leader Development, (2010).
- If you’re struggling a bit with your Imposter Syndrome as a coach, I can’t more highly recommend the work by **Megan Jo Wilson**. You’ll need to overlook the title and dive into the book. It really boosted my can-do spirit when it comes to my coaching practice.
 - Who The F*ck Am I To Be a Coach?!: A Warrior’s Guide to Building a Wildly Successful Coaching Business from the Inside Out, (2017).
- **Sara Orem, Jacqueline Binkert, and Ann Clancy** have written a coaching book that uses Appreciative Inquiry as it’s foundation for the coaching. Think strengths-based and positivity-based activity in coaching.
 - Appreciative Coaching: A Positive Process for Change, (2007).
- **Martin Seligman** is perhaps the father of positive psychology; his work will give any coach a solid grounding in the field.
 - Authentic happiness: Using the new positive psychology to realize your potential for lasting fulfillment, (2003).

- Another positive approach to coaching, not that we're all negative, is by leveraging Positive Psychology practice. **Robert Biswas-Diener** has written the definitive book on the topic that provides a ton of tools to add to your coaching toolbox.
 - *Practicing Positive Psychology Coaching: Assessment, Activities and Strategies for Success*, (2010).
- **Edgar H. Schein and Peter A. Schein** appear again. I love the stance and focus of Humble Inquiry as a coach, as a person, as a leader, just everywhere.
 - *Humble Inquiry – The Gentle Art of Asking Instead of Telling* (2nd edition, 2021).

Coaching Skills

The way I think of this is more broadly than simply the Coaching competency or stance. I think of coaching skills as growing our ability to stay present with the client and then dance with all of the stances as appropriate in service to our client's agenda. As our skills improve, this ability to sense and then respond (dance) with the appropriate stances becomes more natural and seamless.

- **Lyssa Adkins'** agile coaching book is probably the most referenced book in this space. One of the things I think it does a great job with, is describing and exploring the mindset of the agile coach.
 - *Coaching Agile Teams: A Companion for Scrum Masters, Agile Coaches, and Project Managers in Transition*, (2010).
- I know quite a few coaching colleagues who've attended Co-Active Coaching classes and certification. It's a professionally coaching focused program that is largely for 1:1 coaching. The lead authors are **Henry Kimsey-House and Karen Kimsey-House**. I highly recommend it
 - *Co-Active Coaching: The proven framework for transformative conversations at work and life*, (4th edition, 2018).
- **John Whitmore** was a leading thinker on leadership and coaching, and his GROW model has become a favorite with managers and coaches.
 - *Coaching for performance: GROWing human potential and purpose: the principles and practice of coaching and leadership*, 4th Edition (2009).
- **Nancy Kline** could be the best listener in the world, and her book will help you focus on creating thinking environment for your clients.
 - *Time to Think* (1999).
- **Kim Morgan and Geoff Watts** look at common behavioral anti-patterns and approaches for helping your client who presents with one of the twelve traits. It also has interviews with well-known people who have suffered with each of the traits.
 - *The Coaches Casebook: Mastering the Twelve Traits That Trap Us* (2015).

- **Len Lagestee** is someone who isn't very well known in the agile community, but he's someone I love listen to. I enjoy his perspectives on things and he always makes me think...more deeply. This article explores assessment areas for an Organizational Change Coach. I think you'll find it valuable.
 - How to Assess an Organizational Change Coach – <https://illustratedagile.com/2019/10/02/how-to-assess-an-organizational-change-coach/>
 - And here's a link to all of the coaching articles on Len's blog. I would highly recommend reviewing them and finding something of interest. I think everyone will find something of interest and of value – <https://illustratedagile.com/page/2/?s=coaching>
- **Damon Poole and Gillian Lee** have recently published a book that explores and drills into the details of the professional coaching stance. I think it's the best "deep dive" to date into the professional coaching stance from an agile lens. It also contains LOTS of conversational examples.
 - Professional Coaching for Agilists – Accelerating Agile Adoption, (2021).
- I can't recommend this book about coaching conversations from **Douglas Squirrel and Jeffrey Fredrick** highly enough. It's a very example oriented and follows an interesting conversational flow.
 - Agile Conversations – Transform Your Conversations, Transform Your Culture, (2020).
- Related to the conversation nature of the last one, **Niall McShane** has written another relevant book that emphasizes the power of conversations.
 - Responsive Agile Coaching – How to Accelerate Your Coaching Outcomes with Meaningful Conversations, (2020).
- When I stumbled upon the work of **Michael Bungay Stainer** I was, in a word, flabbergasted. I love his style, wisdom, and coaching advice/wisdom. Both of his books are incredibly useful additions to your coaching library.
 - The Coaching Habit: Say Less, Ask More & Change the Way You Lead Forever, (2016).
 - The Advice Trap: Be Humble, Stay Curious & Change the Way You Lead Forever, (2020).
Keep this one in mind when you're adopting a Consultative or Advising coaching stance.
- **Marion Franklin** has written a book that explains her coaching approach as being Laser-Focused. While I don't think it's a revolutionary approach, it is another great coaching guide with a unique perspective.
 - The Heart of Laser-Focused Coaching: A Revolutionary Approach to Masterful Coaching, (2019).
- **Nancy Kline** could be the best listener in the world, and her book will help you focus on creating thinking environment for your clients and create incisive questions.
 - Time to Think, (1999).

Coaching Systems

- **ORSC or Organization Relationship and Systems Coaching** is a body of knowledge, classes and certification pulled together by, **Faith Fuller and Marita Fridjhon**, the two founders of CRR-Global. If you're looking for a framework or compendium around coaching systems, then this is the place to begin.
 - <https://crrglobal.com/about/orsc/>
 - I've pulled together a nice index of ORSC Tools Applied to Agile Coaching here - <https://www.agile-moose.com/introduction>. Just follow the flow.
 - *Creating Intelligent Teams: Leading with Relationship Systems Intelligence*, Dr. Anne Rod and Marita Fridjhon; (2020).
- Excellent articles and how to guides on **Systems Thinking**. Start with this if you have little knowledge of systems thinking.
 - <https://thesystemsthinker.com/>
- **John Leary-Joyce & Hilary Lines** provide clear guidelines, challenging interventions and dynamic models for working with teams in their systemic context.
 - *Systemic Team Coaching* (2018); John Leary-Joyce & Hilary Lines, (2018).
- Another solid, place to start is **John Wittington's**, *Systemic Coaching and Constellations*. The constellation approach (tool, technique) can be used in a wide variety of contexts.
 - *Systemic Coaching and Constellations: The Principles, Practices, and Application for Individuals, Teams, and Groups*, (3rd edition, 2020).
- And finally, **Peter Hawkins and Eve Turner** have provided a model that I've found to be useful not only in coaching clients systems, but in coaching other coaches and setting up coaching systems.
 - *Systemic Coaching: Delivering Value Beyond the Individual*, (2019).

Facilitating

Facilitation Mindset

- **Christopher Avery** is a leading voice in the areas of responsibility and accountability. His The Responsibility Process, is a unique and valuable resource in this area.
 - The Responsibility Process – Unlocking Your Natural Ability to Live and Lead with Power, (2016).
- The **Stephen Karpman** Drama Triangle is a wonderful model to think about accountability behaviors in agile organizational contexts.
 - https://en.wikipedia.org/wiki/Karpman_drama_triangle
 - Presence vs. The Drama Triangle - https://www.youtube.com/watch?v=ovrVv_RICMw
- **Sociocracy** is among other things, a community, an organizational operating system, and a model for facilitating effective meetings and decision making. I bring it up here because of the latter and the relationship that has to accountability. Related to this is a book by
 - Entry Sociocracy website - <https://www.sociocracyforall.org/start-here/>
 - Facilitation model & worksheets - <https://www.sociocracyforall.org/facilitation/>
 - Related to this is a book by **Jutta Eckstein & John Buck**, Company-wide Agile with Beyond Budgeting, Open space & Sociocracy: Survive & Thrive on Disruption, (2020). Otherwise known as the Bossa.nova book.
- **Amy C. Edmondson's** book explores this culture of psychological safety, and provides a blueprint for bringing it to life. The road is sometimes bumpy, but succinct and informative scenario-based explanations provide a clear path forward to constant learning and healthy
 - The Fearless Organization: Creating Psychological Safety in the Workplace for Learning, Innovation, and Growth, (2018).
- Finally, this more recent book by **Dr. Mark Smutny**, explores how to inspire and increase the inclusivity in your meetings.
 - Thrive: The Facilitators Guide to Radically Inclusive Meetings, (2019).

Facilitation Skills

There are quite a few excellent resources for general purpose facilitation. I'll share the ones that I've come to depend on in my agile coaching.

- **Marsha Acker** is an agile coach who very recently published a wonderful guide on facilitation. I'd consider it an exemplar for facilitation strategy and tactics as an agile coach.
 - The Art & Science of Facilitation: How to Lead Effective Collaboration with Agile Teams, (2021).
- **Sam Kaner** has written a seminal work on general facilitation (not specific to agile). I've probably heard it recommend from all of the agile coaching colleagues I typically collaborate with. It's that good.

- Facilitator’s Guide to Participatory Decision-Making, (3’rd Edition, 2014).
- When I found out that **Jean Tabaka** had passed away, I was devastated. She was one of our “shining lights” in the agile community. She blessed us with a wonderful book on team facilitation that I highly recommend.
 - Collaboration Explained – Facilitation Skills for Software Project Leaders, (2006).
- I was looking for a solid guide to meeting facilitation when I found this gem of a book by **Dee Kelsey and Pam Plumb**. It’s not widely known or referenced and it’s a bit dated, but I’ve found it incredibly practical for many years.
 - Great Meetings!: Great Results. (2’nd Edition, 2004).
- **Dave Gray, Sunni Brown, and James Macanujo** have written a really solid piece of work that serves as a playbook for facilitation and learning techniques. It’s also a really nice guide if you’re a change agent (and all coaches are change agents).
 - Gamestorming – A Playbook for Innovators, Rulebreakers, and Changemakers, (2010).
 - <https://gamestorming.com/>
 - <http://www.xplanner.com/>
- **Mark Summer’s and the BeLiminal team’s blog** provides an overview of designing workshops to guide participants through divergent and convergent thinking.
 - <https://www.beliminal.com/facilitation-skills-for-agile-coaches-and-scrum-masters/>
- When **Luke Hohmann** introduced Innovation Games in 2006, I was struck with its...well, innovation. Nobody was talking about collaborative gaming before Luke brought it to light. And the overall focus towards product teams was incredibly helpful. And now, it’s been merged into Scaled Agile as well.
 - Innovation Games: Creating Breakthrough Products Through Collaborative Play, (2006)
 - <https://collaborate.scaledagile.com/>

Guiding Learning

Learning Mindset

This is the first competency where your mindset is specifically called out as part of exploring aspects of the competency. It's where your Self-Mastery—Continuous Learning connects to your coaching clients and their development. As a competency, this is one of the least direct competencies in that we're leaning out of Mentoring and Teaching—giving our client's more space.

- The beginning of your journey here should be investigating and studying the work of **Peter Senge** on learning organizations in his Fifth Discipline work.
 - The Fifth Discipline: The art & Practice of the Learning Organization, (2010).
 - The Dance of Change: The challenges to sustaining momentum in a learning organization, (2014).
- **Emily Webber** has probably written the definitive book exploring modern communities of practice. While it's not specifically targeting agile CoP's, it's a great resource for establishing such things.
 - Building Successful Communities of Practice – Discover How Connecting People Makes Better Organizations, (2016).
 - <https://emilywebber.co.uk/>
 - <https://www.youtube.com/watch?v=9Owrovki73o>
 - <https://rgalen.com/agile-training-news/2021/5/3/community-of-practice>
- **Dojos and similar practice activities** should become THE way of educating individuals, roles, teams, and organizations. That is, learning by practice, practice, and more practice.
 - Coding Dojo – <https://codingdojo.org/>
 - Code Kata – <http://codekata.com/>
 - There are two solid references from my blogs:
 - On coaching practice – <https://rgalen.com/agile-training-news/2020/8/29/were-talking-aboutpractice>
 - Coaching Dojos - <https://rgalen.com/agile-training-news/2016/6/12/coaching-dojos-with-a-twist>
- **Dion Stewart and Joel Tosi** have written a wonderful book that explores organizational **Dojos** as a means of experientially training agile teams. It walks through the entire “process” and provides wonderful examples and guidance.
 - Creating Your Dojo: Upskill Your Organization for Digital Evolution, (2019).
 - Here's an example of the **Target Dojo** - <https://dojo.target.com/>
- One of the skills that seems to be a part of our coaching is the relatively new notion of **Graphic Facilitation**. When I think of graphic facilitation, I first think of Stuart Young ¹who I met at a Scrum Coaching Retreat many years ago. I've even taken a class from him, but my sketching is still not one of my strengths. That being said, I think our ability to draw (sketch really) can make a huge difference in our teaching. I'd like to recommend two books on the subject.

¹ Stuart was kind enough to contribute sketches as a lead-in for each chapter in the EBAC book. So, you can view the impact of sketchnoting that way as well.

- **Brandy Agerbeck**, The Idea Shapers – The power of putting your thinking into your own hands, (2016).
- **David Sibbet**, Visual Meetings – How Graphics, Sticky Notes, & Idea Mapping can Transform Group Productivity, (2010).
- **Stuart's website** - <https://www.illustrationstation.co.uk/>
- The maturity of your audience is a very important aspect of your teaching styles. One of the more common metaphors for considering individual (and team) maturity is the Aikido metaphor of **Shu Ha Ri. Andy Hunt**, of Pragmatic Programmer fame, wrote a book quite a few years ago that explored learning. It did introduce the Dreyfus Model for Skills Acquisition, which is similar to intent to Shu-Ha-Ri, but quite different.
 - Pragmatic Thinking and Learning: Refactor your Wetware, (2008).
 - https://en.wikipedia.org/wiki/Dreyfus_model_of_skill_acquisition
- Liberating Structures is another one of those tools that has begun to take the agile world by storm. It's a wonderful set of facilitation techniques that foster and facilitate learning. My favorite teacher of the structures is **Dana Pylayeva**, but there are many others.
 - The seminal book on the subject is by **Henri Lipmanowicz and Keith McCandless**, The Surprising Power of Liberating Structures: Simple Rules to Unleash a Culture of Innovation, (2014).
 - <https://www.liberatingstructures.com/>
 - <https://www.liberatingstructures.com/principles/>
 - <https://www.agileplayconsulting.com/>

Mentoring

When I think of Agile Coach, as Mentor; I think of a master craftsperson who is showing an apprentice how to master their craft. The spatial connection is should-to-shoulder. The teach is showing and demonstration based with moments of teach-back. The learning is shared experience.

- **John Maxwell** is the consummate leader and leadership teacher and mentor. In this work, he explores the leader's role in and how to mentor.
 - Mentoring 101, (2008)
- Believe it or not, there's quite a bit written about mentoring. John Maxwell is one of my favorite leadership-centric authors and he's written a book. As has Ken Blanchard, of One Minute Manager fame. One of my favorite authors on the topic **Lois Zachery**. She is a deep-dive expert on the topic and I want to share three of her books—
 - Creating a Mentoring Culture: The Organization's Guide, (2011).
 - Starting Strong – A Mentoring Fable, (2014).
 - The Mentor's Guide: Facilitating Effective Learning Relationships. (2'nd edition, 2011).
- Often Agile Coaches are in the role or position of "Coaching up" or, for the purposes of this entry, "Mentoring up". But saying that, how do you acquire those skills? I think all of the works of **Patrick Lencioni**, starting with the 5 Dysfunctions of a Team, should be in your library and memory if you're mentoring leaders. All, well most, of the books are in a fable format where you can learn how to mentor and coach folks from how the characters interact. They're a great resource that warrants exploration.

- **Wendy Axelrod** has written a wonderful guide focused on how to be a skilled mentor, which is helpful for all agile coaches. It's incredibly practical.
 - 10 Steps to Successful Mentoring, (2019).

Teaching

When I think of Agile Coach, as Teacher; I think of a mastering a tool-kit of effective teaching techniques for adult / professional learners. Sharon Bowman's work should probably be the foundation of your learning journey. I would

craftsperson who is showing an apprentice how to master their craft. The spatial connection is should-to-shoulder. The teach is showing and demonstration based with moments of teach-back. The learning is shared experience.

- I remember ~10-years ago the name **Sharon Bowman** and Training from the Back of the Room (TFTBOTR) was THE topic amongst nearly every certified trainer. That and “no more PowerPoints” was (and is still) all the rage. To say that Sharon's work positively disrupted our views to training is an understatement. Must read and consider material!
 - Training from the Back of the Room!: 65 Ways to Step Aside and Let Them Learn, (2008).
 - Using Brain Science to Make Training Stick, (2010).
- There is a strong movement towards using **PLAY** as a means of facilitating learning. You see it in most Scrum Master and other certification classes. Here are some examples to explore—
 - **Jacqueline Lloyd Smith and Denise Meyerson** have written about Strategic Play as a means of creating a space for learning and discovery.
 - Strategic Play – The Creative Facilitator's Guide, (2015).
 - Strategic Play – What the Duck!, (2017).
 - **LEGO Serious Play** - <https://www.lego.com/en-us/seriousplay/background>
 - **Sean Blair** has written a number of books that detail how to leverage LEGO Serious Play as a learning and facilitation tool.
 - SeriousWork – How to Facilitate Meetings & Workshops Using the Lego Serious Play Method, (2016).
 - SeriousWork – the Lego Serious Play Methods – 44 Facilitation Techniques, (2020).
 - How to Facilitate the Lego Serious Play Method Online, (2020).

Serving

General

One of the central themes of agile ways of working is that leadership and other roles within the organizations should be fostering and developing a servant-oriented mindset. There are two primary directions for that service—toward the teams (individuals) and toward the business (customers, stakeholders, and sponsors). Now all of this said, finding the balance between servant and self can be difficult for an agile coach. That’s why there is such an emphasis on self-mastery and self-care in the Wheel.

- At the risk of being self-serving, I want to recommend Joshua Anderson’s and my podcast, the **Meta-Cast** to the list of resources. As of August 2023, we’ve recorded 250+ episodes over the course of ~14 years. While we cover every topic under the agile sun, I believe there are quite a few podcasts that will help you to better understand and coach at the team level.
 - <https://www.meta-cast.com/>
- Testers and programmers learning to work together is something that many new teams go through. **Lisa Crispin and Janet Gregory** explore the dynamics of a whole team approach to quality. One to give your software teams.
 - Agile Testing: A Practical Guide for Testers and Agile Teams (2009).
- **Diana Larsen and Ainsley Nies** have written the ONE definitive work that stands out in this space. It’s unique and incredibly valuable.
 - Liftoff – Start and Sustain Successful Agile Teams, (2016).
- **Jurgen Appelo** has written a book around “Management”, but it contains so many tools and wisdom around interacting with the teams. Both at the beginning (starting) and ongoing.
 - Management 3.0: Leading Agile Developers, Developing Agile Leaders, (2010).

Serving the Team

Serving the team can be amplified to a wider variety of teams—cross organizational, leadership, functional, and agile in nature. I believe a key aspect here is not solely focusing on Coaching stance in your service. Meaning, sometimes the best way to serve your teams is to challenge them directly or by prescribing some changes.

- I think that retrospectives are the heart & soul of a team’s dynamics. **Esther Derby and Diana Larsen** have written the definitive book on the subject. As a coach, the retrospective needs to become one of your “stages” for coaching.
 - Agile Retrospectives: Making Good Teams Great, (2006).
 - A 2nd edition of the book, adding **David Horowitz** as a third author, will be published in January 2024 by The Pragmatic Programmers.
- Sometimes we can be overly protective of teams, now allowing them to experience a bit of turbulence. Which can create resiliency. **Heidi Helfand** explores how a bit of disruption can be good for team development.

- Dynamic Reteaming: The Art and Wisdom of Changing Teams, (2nd edition, 2020).
- **Geoff Watts** has done a masterful job of defining all aspects and dynamics of the Scrum Master role, which contains great clarity around serving the team and what that looks like.
 - Scrum Mastery: From Good to Great Servant Leadership, (2nd edition, 2021).
- **Richard Hackman's** work on creating the conditions for increasing team success is a great contribution in our understanding of teams.
 - Leading Teams: Setting the Stage for Great Performances, (2002).
- **Glenda Eoyang** introduces us to a great model for creating self-organizing systems
 - Conditions for Self-organizing in Human Systems, (2002).
- **Daniel Pink** brings together the research around motivation in an easily consumable way, this is a create place to start when diving into motivation.
 - Drive: The Surprising Truth About What Motivates Us, (2009).
- **Patrick Lencioni's** fable is an easy read full of ideas that inspire your thinking about the teams that you work with.
 - The Five Dysfunctions of a Team: A Leadership Fable, (2002).
- **David Burkus'** work is essential guidance for leading (and serving) in today's distributed and remote team environments.
 - Leading from Anywhere: The Essential Guide to Managing Remote Teams, (2021).

Serving the Business

I think of this agile coaching service level as initially focused on developing your business knowledge and acumen in your current organizational context. It's putting on a product-mindset, not only by your reading, but by your experience. Consider the skills required in coaching leaders and up, and this would have that same nuance in coaching from a product or business perspective.

- Of course, **my own Scrum Product Ownership book**. And yes, I'm a bit biased but it's in the 3rd edition and has improved with each and time.
 - Scrum Product Ownership: Navigating the Forest AND the Trees, (2019).
- I would HIGHLY recommend listening to **Cory Bryan's podcast** in this space. Longer term content with some great guests.
 - <https://www.deliveritcast.com/>
- **Newsletters**
 1. Pawel Huryn – <https://www.productcompass.pm/subscribe>
 2. Product Collective – <https://productcollective.com/>
 3. John Cutler – The Beautiful Mess - <https://cutlefish.substack.com/subscribe>
 4. David Pereira – <https://dpereira.substack.com/subscribe>
 5. Adrian Howard – <https://quietstars.us2.list-manage.com/subscribe>
 6. Maarten Dalmijn – <https://mdalmijn.com/subscribe>

- A wonderful LinkedIn post by **Elle Anderson** that speaks to the expansion into **Product Coaching**, what it looks like, and includes two incredible videos.
 - https://www.linkedin.com/posts/anderelle_why-do-roman-pichler-i-believe-that-tangible-activity-7118380894918184960-rllL/
 - House Of The Product Coach (Roman Pitchler): <https://www.youtube.com/watch?v=yxZma3MpwXg>
 - Breaking Into Product Coaching (Elle Anderson): <https://www.youtube.com/watch?v=1cNYhmarb4s>
- **Eric Ries'** work was (and IS) truly ground breaking when it was first published. It's a must-read book in our agile space.
 - The Lean Startup – How Today's Entrepreneurs Use Continuous Innovation to Create Radically Successful Businesses, (2011).
 - The Startup Way: How Modern Companies Use Entrepreneurial Management to Transform Culture and Drive Long-Term Growth, (2017).
- One of my Top 10 coaching questions in product contexts is—How do you “handle UX” in agile, Scrum, etc.? **Jeff Gothelf and Josh Seiden** have explored this deeply in their book.
 - Lean UX: Designing Great Product with Agile Teams, (2016).
- **Value Stream Mapping** is a general technique that helps to facilitate various stakeholder envisioning the path from an idea to value. The Scaled Agile Framework has some nice references around the practice and how to facilitate it.
 - <https://www.scaledagileframework.com/value-streams/>
- **Marty Cagan** is a founder/principal of the Silicon Valley Product Group (SVPG) and has written a couple of books that are useful in the agile space. Empowered is also an interesting book from a “teaming” perspective.
 - INSPIRED: How to Create Tech Products Customers Love, (2017).
 - EMPOWERED: Ordinary People, Extraordinary Products, (2020).
- **Richard Banfield, Martin Eriksson, and Nate Walkingshaw** have written a book focused largely on the team-building dynamics for building great product teams. Given it's organizational focus, it connects to Serving the Team and to Transformation.
 - Product Leadership: How Top Product Managers Launch Awesome Products and Build Successful Teams, (2017)
- My first agile-centric book was Scrum Product Ownership, which I published in 2009. Within a year, **Roman Pichler** published a competing book that has done incredibly well in the space. Damn him. But I did get there first. Seriously, he's a great resource for agile product thinking and he's also published a wonderful book on strategy.
 - Strategize: Product Strategy and Product Roadmap Practices for the Digital Age, (2016).
- **Melissa Perri** came onto the product scene from a pure product management perspective, so not directly agile. Her thinking in this space is fresh and useful, and her Buildtrap book was/is groundbreaking.
 - Escaping the Build Trap: How Effective Product Management Creates Real Value, (2018).

- **Jeff Patton** virtually invented the visualization technique of story mapping. I've been using it for more than a decade, with it being one of my go-to techniques for product & work visualization and collaboration.
 - User Story Mapping: Discover the Whole Story, Build the Right Product, (2014).
- **Geoff Watts** has done a quite masterful job of define all aspects and dynamics of the role.
 - Product Mastery: From Good to Great Product Mastery, (2017).
- Again, damnit, **Roman Pichler** and his basic product owner book. When I think of Roman and his work, I think of it more about the product dynamics organizationally.
 - Agile Product Management with Scrum: Creating Products That Customers Love, (2010).
- It's often important to be able to articulate the shift from project-based thinking to product-based thinking. **Mik Kersten's** book does a great job of defining the challenge, benefits, and the how to get there organizationally.
 - Project to Product: How to Survive and Thrive in The Agile of Digital Disruption with the Flow Framework, (2018).
- While relatively short, this Forbes article provides some actual implementation discoveries from a **Project-to-Product** transformation. Not only is it useful for your thinking as a coach, but as an example for your clients.
 - <https://www.forbes.com/sites/forbestechcouncil/2021/06/11/transforming-your-company-from-project-to-product-thinking-lessons-from-a-large-enterprise/>
- **Product-based organizations** are inclusive of Product Management & Ownership. However, they also become a bit of a mindset and organizational dynamics challenge. Focusing on the latter first will get you better coaching results.
 - <https://rgalen.com/agile-training-news/2018/12/12/project-vs-product-organizational-focus>
- Helping your clients embrace continuous innovation is a key component here. **Chris Lukassen's** book provides a modern set of ideas, from a Business/Client/Product perspective of how to create an innovation pipeline.
 - The Product Samurai: A Product Manager's Guide to Continuous Innovation, (2019).
- If you are a member of the Scrum Alliance, you should have access to the **Product Owner Personal Improvement Tool** from Comparative Agility – <https://www.comparativeagility.com/>. This is a great way to develop your understanding of the depth & breadth associated with Product Ownership and also leverage it with your clients.
- My friend **Todd Olson** is the CEO of Pendo, which delivers a platform that empowers product-driven strategies and he's written an interesting book on the topic.
 - The Product-Led Organization: Drive Growth by Putting Product at the Center of Your Customer Experience, (2020).

Leading

General

It begins with every Agile Coach realizing that they are a leader. They are an example of—what good looks like. It also means that you become a courageous communicator, speaking truth to power, and actively sharing radical candor. A challenging part of this stance is that it's quite opposite of Coaching stance, in that you'll have to have the courage to take risks in challenging your clients. Or occasionally seeming and being prescriptive.

- **Stephen R. Covey and Stephen M. R. Covey** have shared two generational-spanned books that explore inside-out agile leadership from a principled perspective and from an extending trust and inspiration perspective.
 - Principal-Centered Leadership, (1992)
 - Speed of Trust, M.R. Covey, (2008)
 - Trust & Inspire, M. R. Covey, (2023)
- **John Maxwell** is a prolific author on leadership topics. At last count I believe he's published more than 50 books. A couple of my personal favorites include—
 - Failing Forward: Turning Mistakes into Stepping Stones for Success, (2007);
 - The 360 Degree Leader: Developing Your Influence from Anywhere in the Organization, (2011)
 - The Self-Aware Leader, (2021)
- **Bob** has collated a collection of his blog posts on **Agile Leadership** into a collection under the Agile Reflections title. There are over ~70 articles that you can review. You can find it—Agile Reflection on Agile Leadership, Edition 2 in our REPO.
 - [EBAC – Materials Repo](#)
- **Karen & Henry Kimsey-House** have written Co-Active Leadership. It's a model that applies a spatial orientation towards different leadership stances (think: front, sides, behind, self). It can be useful as a model and in the language for coaching leaders and being self-aware as coaches dancing in our own leadership stances.
 - Co-Active Leadership, Second Edition: Five Ways to Lead, (2021).
- **Brené Brown** has written about courage, authenticity, vulnerability with respect to leadership. Her works have been of influence to many. I would encourage you to read any of her works and her TED talks are incredibly powerful as well.
 - TED Talk: Vulnerability –
 - https://www.ted.com/talks/brene_brown_the_power_of_vulnerability
 - Dare to Lead: Brave Work. Tough Conversations. Whole Hearts., (2018).
 - Braving the Wilderness: The Quest for True Belonging and the Courage to Stand Alone, (2017).

- **Bob** has written a 5-part series on culture-shaping activities that we all can make as leaders. Whether we want to acknowledge it or not, we're culture-shaping all of the time. This series focused on being more aware and intentional about it.
 - Part-1: <https://www.agile-moose.com/blog/2020/6/12/a-leaders-guide-to-culture-shaping-part-1>. There are links in this post to the others.
- I've been a subscriber to the **Harvard Business Journal** (HBJ) since the late 1980s. It's been a staple for my leadership development, organizational skills, and business perspectives. It not only aligns in this area (Leading) but also in (Advising and Transformation). Highly recommend for anyone who is a leader and/or coaching leaders.

Visionary

Creating and sharing your vision is a paramount skill in this area. I think it's rare that you create it along. Instead, I envision you co-creating it amongst your organization leaders (clients, stakeholders, sponsors) your fellow coaching team, and the individuals & teams in the organization. A fundamental aspect is to create a (1) achievable, but (2) compelling vision of your agile transformation and new ways of working.

- **Alize Hofmeester** focuses on establishing a purpose-driven or purposeful culture as part of the vision proposition for an agile leader. She also weaves in the notion of sustainability.
 - Purpose Driven People: Creating business agility and sustainable growth, (2021).
- **Daniel Mezick** is one of the thought leaders in the inviting leadership movement where leaders invite versus tell or prescribe their teams to try agile approaches. He often speaks to the "power of an invitation". He's also written about Open Space Agility, which leverages open space for organizational change. You need to become familiar with Dan's work and the implications for your coaching.
 - The Culture Game – Tools for the Agile Manager, (2012).
 - The Open Space Agility Handbook, (2015).
 - Inviting Leadership: Invitation-Based Change in the New World of Work, (2018) written with **Mark Sheffield**.
- **Steve Denning** has written a rather compelling, leadership centric view, for the compelling WHY behind agile transformation. It's important to have a higher-level view that you can communicate across the organizations you are coaching.
 - The Age of Agile: How Smart Companies Are Transforming the Way Work Gets Done, (2018).
- **Gerald 'Jerry' Weinberg** has written a wonderful book about becoming a change artist that's centered on Virginia Satir's work. If there's one book to read about the "people aspects" of change, this is the one.
 - Becoming a Change Artist – Quality Software Book #7, (2011).

- **Robert R. Shallenberger and Steve Shallenberger** have written a 6-step guide to establishing organizational vision and a prioritization book. Both combine to be incredibly supportive of creating your visions.
 - Start with the Vision: Six Steps to Effectively Plan, Create Solutions, and Take Action, (2020).
 - Do What Matters Most: Lead with a Vision, Manage with a Plan, and Prioritize Your Time, (2021).
- **Steve Jobs**, while Jobs isn't always the best of leadership role models, his online videos can be incredibly valuable as instructional content. For example,
 - His [Stanford Commencement Address](#), is a master class in storytelling;
 - His [response to this insult](#) in front of a large crowd, is a thoughtful example;
 - And his [response on managing people](#), is again insightful.I would encourage you to study Jobs as a visionary leader, fantastic marketer and communicator, and innovator.

Role Modeling

One of the most important aspects of your role modeling is walking your talk. And there is a consistency aspect to it as well—not only when the going is easy, but also when the going is tough. Another way to envision it is—leading by example. Or being the living embodiment of the agile leader's mindset.

- **Diana Larsen and Tricia Broderick** have written a leadership guidebook that is focused around the notion of blame—what it is, what creates it, and how to eliminate it as a leader. You can share it with your leadership clients and internalize it as an agile coach.
 - Lead Without Blame: Building Resilient Learning Teams, (2023).
- All of the works of **Patrick Lencioni**, starting with the 5 Dysfunctions of a Team, should be in your library and memory if you're looking for role models examples for how leaders should be "showing up". All, well most of, the books are in a fable format where you can learn how to mentor and coach folks from how the characters interact. All of them are short and fast reads. They're a great resource that warrants further exploration.
 - The Five Dysfunctions of a Team
 - The Ideal Team Player
 - The Four Obsessions of an Extraordinary Executive
 - Death by Meeting
 - The Motive
 - Getting Naked
 - The Five Temptations of a CEO
 - Silos, Politics, and Turf wars
 - The Truth About Employee Engagement

- **David Marquette** has written two wonderful books based on his military leadership experience. While that doesn't sound like a match for agile contexts, it is. The first book explores transformational leadership. And the second, the incredible importance that our language has
 - Turn This Ship Around: A True Story of Turning Followers into Leaders, (2013).
 - Leadership is Language: The Hidden Power of What You Say—and What You Don't, (2020).
- **Jean Dahl** has a ton of agile coaching and transformation experience. But more importantly, she's been in senior leadership roles and knows what it takes to lead from a lean mindset perspective.
 - Leading Lean: Ensuring Success and Developing a Framework for Leadership, (2020).

Leading for Growth

The essence of leading for growth is establishing, fostering, and growing your learning organization. Succession planning is a big part of it, as is establishing an organizational mindset of continuous learning and growth. As an aside, it begins with your personal, inside-out growth and modeling that for your organization.

- I remember **Natal Dank & Riina Hallström** wrote Agile HR, I thought to myself...it's about time! And I think the icing on the cake is their deep experience and alignment with an iCAgile certification.
 - Agile HR: Deliver Value in a Changing World of Work, (2020).
- The beginning of your leadership journey here should be investigating and studying the work of **Peter Senge** on learning organizations in his Fifth Discipline work.
 - The Fifth Discipline: The art & Practice of the Learning Organization, (2010).
 - The Dance of Change: The challenges to sustaining momentum in a learning organization, (2014).
- I've been teaching the Scrum Alliance Certified Agile Leadership class since 2017. I've leveraged two leadership models in the class. First is **Bill Joiner's Leadership Agility** and second is **Bob Anderson and Bill Adam's Mastering Leadership / Leadership Circle Profile** work. In both cases, the models provide wonderful insights into how a leader's mindset and competencies align with agile leadership principles. I would highly recommend you're becoming familiar (as an advanced skills exercise) with both models.
 - Leadership Agility: 5 Levels of Mastery for Anticipating and Initiating Change, (2007).
 - Mastering Leadership - An Integrated Framework for Breakthrough Performance and Extraordinary Business Results, (2015).
 - Scaling Leadership: Building Organizational Capability and Capacity to Create Outcomes that Matter Most, (2019).
- What I like about **Tim Clark's** treatment of psychological safety is the nuance that the 4-quadrants brings into play. It provides more depth to your coaching understanding and communication around the topic.
 - The 4 Stages of Psychological Safety: Defining the Path to Inclusion and Innovation, (2020).
- **Appreciative Inquiry** is an organizational development focus that aligns with Seligman's (and others) work on Positive Psychology. It's a method or framework that is strengths-based and has a model, similar to Open Space technology, for group-based strengths identification and charting organizational change. Here's a library of sorts, and don't react negatively to the source dates—
 - The Power of Appreciative Inquiry, Whitney and Trosten-Bloom; (2003)
 - Appreciative Inquiry Handbook, Cooperrider, Whitney, and Stavros; (2003)
 - The Appreciative Inquiry Summit, Ludema, Whitney, Mohr, and Griffin; (2003)
 - Appreciative Inquiry Team Building, Whitney, Trosten-Bloom, Cherney, and Fry; (2004)
 - Appreciative Coaching, Orem, Binkert, and Clancy; (2007)

EBAC – Badass Learning Journey aligned with Agile Coaching Growth Wheel

The Team Building book is a wonderful reference with lots of AI-based questions that can be used in coaching contexts. That, along with the Coaching book, will make a useful addition to your agile coaching mindset and coaching skillset.

Transforming

General

Outside of the core coaching stances and dancing between them, this is probably the largest challenge for most agile coaches who are operating at the enterprise or organizational level. There are two large areas of skill. First is organizational design which is unique per organizational context. Then, there is guiding organizational change, which is something coaches can't do alone, so it's a partnership opportunity. From a stance perspective, Transforming connects heavily to Advising and Leading.

- The **Business Agility Institute** is a growing source for information in this space – <https://businessagility.institute/>
- **McKinsey & Company on Agile Transformation** – <https://www.mckinsey.com/business-functions/organization/our-insights/the-journey-to-an-agile-organization>
- **Steve Denning's Forbes article**, The 12 Stages of the Agile Transformation Journey – <https://www.forbes.com/sites/stevedenning/2018/11/04/the-twelve-stages-of-the-agile-transformation-journey/>
- **Frederic Laloux** has given new meaning to the word TEAL in agile contexts. Now, just as with Spotify, some folks have created a bit of a teal frenzy. But putting that aside, this is still a groundbreaking book when it comes to agile-friendly cultures and alignment.
 - Reinventing Organizations: A Guide to Creating Organizations Inspired by the Next Stage of Human Consciousness, (2014).
- Laloux's book has brought a spotlight on those people reinventing work, my favorite one recently is **by Aaron Dignan**, founder of The Ready. Also, check-out the Brave New Work podcast.
 - Brave New Work (2019).
- **Shaun Bradshaw and Bob Galen** recorded a set of videos that were entitled Essential Patterns of Successful Agile Transformations. Many of the patterns are focused on partnering with organizational leaders, so there may be some useful information contained within them.
 - Part-1: <https://vimeo.com/509754708>
 - Part-2: <https://vimeo.com/514283044>
- **Michael Spayd and Michelle Madore** have written a book that might be hard to digest, but is thoughtful and powerful. They focus it on the Integral Agile Transformation Framework that they've developed.
 - Agile Transformation: Using the Integral Agile Transformation Framework to think and Lead Differently, (2020).
- **Karim Harbott** is an agile coach in the UK who has written a nice experiential work that explores the enablers of Business Agility.
 - The 6 Enablers of Business Agility: How to Thrive in an Uncertain World, (2022).

Organizational Design

I think of this as the tactical part of the stance. It's where evolutionary organizational design and structure reside in the coach's toolbox. While academic and book knowledge can be useful here, I think the more important skill is experiential. That is, guiding organizational structure evolution in the trenches. And, having emerging success with those structures. Doing this from an extended coaching tenure is important, as there is no better way to qualify your structural design recommendations than time and outcomes.

- Structure of agile teams is often something I avoid as a coach. But I think we need to be aware of options so that we can more effectively coach organizational leaders AND serve the teams. **Matthew Skelton and Manuel Pais** have written a wonderful book that focused on team topologies.
 - Team Topologies – Organizing Business and Technology Teams for Fast Flow, (2019).
- **Stephanie Johnson** has written an important book that explores inclusion (and diversity) in organizations and teams. D&I was explored in Chapter 15 and there are some book recommendations at the end of the chapter. However, this is a great, general resource on the topic.
 - Inclusify: The Power of Uniqueness and Belonging to Build Innovative Teams, (2020).
- **Daniel Mezick** is one of the thought leaders in the inviting leadership movement where leaders invite versus tell or prescribe their teams to try agile approaches. He often speaks to the “power of an invitation”. He’s also written about Open Space Agility, which leverages open space for organizational change. You need to become familiar with Dan’s work and the implications for your coaching.
 - The Culture Game – Tools for the Agile Manager, (2012).
 - The Open Space Agility Handbook, (2015).
 - Inviting Leadership: Invitation-Based Change in the New World of Work, (2018) written with **Mark Sheffield**.
- **Dave Logan, John King, and Haley Fischer-Wright** have written a book focused on the importance and understanding of tribes within organizations. It’s amazing to me that it’s been nearly 10-years since this phenomenal work was published.
 - Tribal Leadership: Leveraging Natural Groups to Build a Thriving Organization, (2012).
- And on a related “tribal” note, **Em Campbell-Pretty** authored a more recent book focused on teams to tribes; albeit in a Scaled Agile context.
 - Tribal Unity: Getting from Teams to Tribes by Creating a One Team Culture, (2016).
- I’ve been teaching the Scrum Alliance Certified Agile Leadership class since 2017. I’ve leveraged two leadership models in the class. First is **Bill Joiner’s Leadership Agility** and second is **Bob Anderson and Bill Adam’s Mastering Leadership / Leadership Circle Profile** work. In both cases, the models provide wonderful insights into how a leader’s mindset and competencies align with agile leadership principles. I would highly recommend you’re becoming familiar (as an advanced skills exercise) with both models.
 - Leadership Agility: 5 Levels of Mastery for Anticipating and Initiating Change, (2007).

- Mastering Leadership - An Integrated Framework for Breakthrough Performance and Extraordinary Business Results, (2015).
- Scaling Leadership: Building Organizational Capability and Capacity to Create Outcomes that Matter Most, (2019).
- **Pamela Meyer's** work aligns quite nicely with Senge's 5th Discipline thinking. She focuses on the dynamics of creating a resilient and adaptive organization. One that continuously learns as well. It also provides a bit of a roadmap for this journey.
 - Agility Shift: Creating Agile and Effective Leaders, Teams, and Organizations, (2016).
- **David Marquette** has written two wonderful books based on his military leadership experience. While that doesn't sound like a match for agile contexts, it is. The first book explores transformational leadership. And the second, the incredible importance that our language has
 - Turn This Ship Around: A True Story of Turning Followers into Leaders, (2013).
 - Leadership is Language: The Hidden Power of What You Say—and What You Don't, (2020).
- I mentioned reading ALL of **Patrick Lencioni's** leadership fable works under Leading. However, **The Advantage** is not a typical Lencioni work. It speaks to organizational leadership, alignment, and maintaining a healthy culture. It has an assessment and health framework that you might find interesting.
 - The Advantage: Why Organizational Health Trumps Everything Else in Business, (2012).
- This is a really hard recommendation for me to make, but... As an agile coach who's involved at the organizational level, I think you have to become a **student of various scaling approaches**. And I would recommend them at three levels:
 - The lightest touch/weight/simplicity – Scrum of Scrums and Spotify approaches;
 - Moderate touch/weight/simplicity – Large Scale Scrum (Less), Scrum @ Scale, and Nexus;
 - Heavy touch/weight/complexity – Scaled Agile Framework (SAFe) and Disciplined Agile.
 - Links:
 - <https://less.works/>
 - <https://www.scrumatscale.com/>
 - <https://www.scaledagileframework.com/>
 - <https://www.scrum.org/resources/online-nexus-guide>
 - <https://www.pmi.org/disciplined-agile>
 - <https://www.atlassian.com/agile/agile-at-scale/spotify>

There's just no way around scaling, but I would highly recommend a more agnostic approach, looking at and understanding the strengths and weakness of all of the frameworks—looking for patterns.

- While LeSS also claims to be a de-scaling framework, I would look to more independent ideas around what **de-scaling** might look like. For example, **Peter Merel** has published...
 - His Descaling Manifesto – <https://www.linkedin.com/pulse/descaling-manifesto-peter-merel/>
 - <https://xscalealliance.org/#about>

- And **Barry O'Reilly** has also written a nice piece on downscaling - <https://barryoreilly.com/explore/articles/downscaling-innovation/>
- **Steve Peacocke** wrote a book that explores the notion of an agile Coach needing a seat at the leadership table. I like to premise and think it might be a new trend in organizations. I also have written
 - Agile Coach to Chief Agility Officer, (2022)
 - <https://www.agile-moose.com/blog/2022/5/15/an-agile-seat-at-the-table>
 - <https://rgalen.com/agile-training-news/2023/4/27/youve-got-a-seat-at-the-table-now-what>

Organizational Change

I've added the language change artistry below because it best exemplifies the nature of being an instigator, influencer, and guider of change. It's something that agile coaches are often tasked with but the dilemma is that we truly can't change others—they have to decide to change themselves. So, what are ways to inspire that change...

Change Artistry

- **Gerald 'Jerry' Weinberg** has written a wonderful book about becoming a change artist that's centered on Virginia Satir's work. If there's one book to read about the "people aspects" of change, this is the one.
 - Becoming a Change Artist – Quality Software Book #7, (2011).
- I've shared **Esther Derby** in this appendix another time for retrospectives. Now I want to recommend you read her book on change. More specifically what I'll call micro-changes.
 - 7 Rules for Positive Productive Change – Micro Shifts, Macro Results, (2019)
 - <https://www.agile-moose.com/blog/2019/12/5/tiny-changes-amp-micro-steps>
- **Jason Little** is, in a word, too little known. His lean change book is one of my most read and applied. I guess what might be the problem is that the book and his advice is so simple that it's easy to discount it. Please don't.
 - Lean Change Management: Innovative practices for managing organizational change, (2014).
 - Change Agility: A guide to help you think about change management differently, (2020).
- **John P. Kotter** should be considered the godfather of change. While his lens is largely through traditional and larger-scale companies, the strategies and approaches are universal and highly applicable to agile contexts. I'd highly recommend becoming familiar with his general work and change model.
 - Leading Change, (2012).
 - The Heart of Change: Real-Life Stories of How People Change Their Organizations, (2012).
 - Our Iceberg is Melting, (2016).

- **Robert Kegan and Lisa Laskow Lahey** have written a pair of books that focuses on changing our language, our messages, and ourselves in order to overcome resistance to (and inspire) change.
 - *How the Way We Talk Can Change the Way We Work: Seven Languages for Transformation*, (2007).
 - *Immunity to Change: How to Overcome It and Unlock the Potential in Yourself and Your Organization*, (2009).

Transformational Change

- **Darrell Rigby, Sarah Elk, and Steve Berez** are three transformation coach and colleagues from Bain & Co. who've written a book about their experienced guiding larger-scale agile transformations.
 - *Doing Agile Right: Transformation Without Chaos*, (2020).
- **Mike Burrows** has written two wonderful books that focus on navigating change or transformation organizationally. One is more of a guide to lean and agile. While the other, *Agendashift*, is a thinking and change model that I highly recommend. Mike has also developed a survey that supports the *Agendashift* model.
 - *Right to Left: The digital leader's guide to Lean and Agile*, (2019).
 - *Agenda Shift: Outcome-oriented changes and continuous transformation*, (2nd Edition, 2021).
 - <https://www.agendashift.com/>
- **Amy Edmondson's** book on create a fear-less organization takes a deep dive into psychological safety and the impact it has on emerging a powerful organizational culture.
 - *The Fearless Organization: Creating Psychological Safety in the Workplace for Learning, Innovation, and Growth*, (2018).
- I've been following Menlo Innovations for quite some time. They're a wonderful example of an agile organization and CEO who are walking their talk. So much so, that they've become a role model within our community. **Richard Sheridan** is the CEO and Founder of Menlo and is central to their culture. He's written a couple of great books that focus on Joy.
 - *Joy, Inc.: How We Built a Workplace People Love*, (2013).
 - *Chief Joy Officer: How Great Leaders Elevate Human Energy and Eliminate Fear*, (2018).
- I've written a 5-part blog series on **Culture-Shaping** from a leadership perspective. You can find it here – <https://www.agile-moose.com/blog/2020/6/12/a-leaders-guide-to-culture-shaping-part-1>
- **Linda Rising and Mary Lynn Manns** have written a pair of patterns-based books that contain a deep and broad set of patterns for introducing change and making the change stick. Most are small and can be applied bottom-up in organizations.
 - *Fearless Change: Patterns for Introducing New Ideas*, (2004), and
 - *More Fearless Change: Strategies for Making Your Ideas Happen*, (2015).

Certifications

When this book and the supporting materials were written, 2022 – 2024, there are primary two organizations that are providing agile coaching certifications—

- The **Scrum Alliance** has two levels:
 - Certified Team Coach (CTC) for team-level or focused coaches; and
 - Certified Enterprise Coach (CEC) for more organizational and leadership-focused coaching.
 - <https://www.scrumalliance.org/get-certified/become-a-coach>
- **iAgile** has two coaching programs. One has been established for quite a while and the other seems to be emerging.
 - Agile Coaching track leading to ICE-AC level coach – <https://www.icagile.com/Agile-Delivery/Agile-Coaching>
 - Enterprise Agile Coaching track leading to ICE-EC level coach – <https://www.icagile.com/Business-Agility/Enterprise-Coaching>

One of the challenges for our industry, and one of the primary drivers for my writing this book, is the lack of a clear and definitive baseline of coaching competencies & skills.

Both of the above certification paths seem to follow the—

- Lyssa Adkins coaching book;
- Agile Coaching Competency framework
- ICF-level, professional coaching

guidelines and advice. But, it's a very soft alignment without firmly evaluating ALL of the stances. What I've tried very hard to do in this appendix is provide a deep and broad set of references across ALL of the stances in the Agile coaching Growth Wheel.

As you develop your experience and skills, I'd recommend you adopt a breadth first, then depth strategy in becoming the Badass Agile Coach that we both know you can be.

Then simply leverage the certifications as a bonus or a validation and confidence building step. The point being—lead your development with personal learning & growth, not just with certifications.

Podcasts

As of 2023, **Anthony Mersino** has compiled an exhaustive list of 52 agile-centric podcasts with personal reviews and commentary around each. I know, I can't imagine how much time it took. Thank you, Anthony!

<https://vitalitychicago.com/blog/best-agile-podcasts/>

My personal recommendations...

This is a short-list of, what I consider to be, Best in Class, agile podcasts for coaches and practitioners. I would highly recommend your “sampling” a few recordings from each to see where you might best align with the podcasters style and content delivery.

1. **DeliverIt** is a Product-centric podcast by **Cory Bryan**. It has been running for many years and there are well over 100 episodes to listen to. Cory often invites guest speakers, so you get a good dose of perspectives. Highly recommended.
 - a. <https://deliveritcast.com/>
2. **Agile for Humans** began as a podcast by **Ryan Ripley**. Now he and his partner, **Todd Miller** are co-hosting it. It has a strong emphasis on Scrum done well, but is a great overall resource. Highly recommended.
 - a. <https://agileforhumans.com/blog/#podcasts>
3. Of course, **Josh Anderson's** and my **Meta-cast** is in the list. Josh and I have been recording it for well over a decade and have over 250 episodes of content. I can hardly think of a topic we haven't touched, at least once. Major themes over the years have been Scrum, Leadership, Teaming, Products, and Planning/Estimating. Of course, highly recommended!
4. **Chris Williams** is one of those voices in the agile community that challenges my thinking. And I like it. His **Badass Agile** podcast is always worth a listen if you're thinking is getting a bit “comfortable”. Recommended.
 - a. <https://badassagile.com/the-podcast/>
5. **Geoff Watts and Paul Goddard** have a fun and informative agile podcast that comes to you from a variety of Pubs—**The Agile Pubcast**. What could be more agile than that? Seriously, this is a high-thought, high-value pair that brings it every cast. Recommended.
6. **Agile Uprising** is a podcast put on by an esteemed group board of practitioners. The hosts vary and they largely interview themselves and invited folks to keep the content fresh, relevant, and thought-provoking. Highly recommended!
 - a. <https://agileuprising.libsyn.com/>
7. **Agile Coaching Network** is an **Agile Alliance** sponsored podcast (recorded) and webinar (live) formats with **Ray Arell** as your host. Ray does a great job of staying agnostic and on-point with the Manifesto principles. Recommended.
 - a. <https://www.agilealliance.org/agile-coaching-network/>

8. **Troubleshooting Agile with Douglass Squirrel and Jeffrey Frederick** is a podcast that focuses on real world problem solving with two fantastic coaches. You also need to read their book!
 - a. <https://agileconversations.com/troubleshooting-agile-podcast/>
9. **The Agile Revolution** is a podcast put on by an esteemed group of “down under” coaches—**Renee Troughton, Tony Ponton, and Craig Smith**. It’s mostly an interview format with lots of different perspectives brought in by the three, very experienced, agilists. Highly recommended!
 - a. <https://theagilerevolution.com/>
10. The **ScrumMasters Toolbox** is a daily podcast produced by **Vasco Duarte**. It’s short and pragmatic with most episodes falling within 10-minutes. Look over the commercialization, because the content is quite good. Recommended.
 - a. <https://scrum-master-toolbox.org/>