The 3 Legs of an Agile Business Practice   Guest was Patrick Waara

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Transcription of Interview

Joe Dager: *Welcome everyone. This is Joe Dager, the host of the Business901 Podcast. With me today is Patrick Waara. He was the first and only Software Design for Lean Six Sigma Master Black Belt in Xerox Corporation before launching his new company, ResponseAgility. Patrick has trained over 700 people around the world in Lean and Agile principles and practices. Patrick, I would like to welcome you, and it's been a few years since you participated in the podcast while you were with Xerox there. But, tell me about what you are doing now and in particular ResponseAgility.*

Patrick Waara: Well, thanks, Joe. I appreciate you having me back. It's always a pleasure. So the big thing of course is that I have spun off my own consultancy, ResponseAgility, where I've taken the Lean and Agile training and consulting that I was doing inside Xerox, and I've combined that with the I.T. and Software Development work that I was doing outside of Xerox and I created my own independent consultancy. It's been a real exciting journey and a great experience and the opportunity arose and as they say, "We don't regret the things we do. You regret the things we never tried." I figured this was the best opportunity to give it a whirl, and so far it's been going well.

Joe: *Well, you picked a home base in Hawaii, and I'm extremely jealous. Are you working there and sitting on the beach with your cell phone or what are you doing?*

Patrick: Well, as I said, I just started my own business, Joe. So, I could tell you I'm working harder than I ever have in my whole life. That's just the way it works. But yeah, Hawaii is a beautiful place. There's no question about that. But, it's like any other place. You still have your day to day grind that you have to do. You work, you clean, you shop, you do yard work, it's all that stuff. No matter where you live, you still have to live, and the trick is always just to take the time to enjoy the things that are available to you. But, that's true no matter where you live. I mean there's beauty everywhere in the world. You just have to make sure that you take the time to enjoy it.

Joe: *You're making that transition. You've been an internal trainer or coach where you have a ready audience, let's say. And now, you're moving to an external one. What are some of the differences you have experienced? I mean it's a big change, isn't it?*

Patrick: Yeah, yeah, in some ways definitely and some ways the same. I had a lot of autonomy inside of Xerox, so I was able to run it like it was my own business. I determined what the content was. I determined how it was going to be delivered. I was responsible for the bottom line, so I managed all the finances in and out, and I managed the operations. From that sense, it's the same. The biggest difference, of course, is that inside of Xerox, like you said I had a ready set of customers and our Deployment Managers essentially operated as my sales force and they knew who needed the consultancy work and who needed training and they basically brought those clients to me. Now, as an independent, you don't have that, right? You are your own sales force. So, it's up to you to find out where your next job is going to be, and that is the biggest transition, and one of my

consulting colleagues said it best when he said, "You know, being a consultant is 20% content and delivery and 80% sales." So, you really do have to wrap your mind around that and that is probably the biggest transition for going from an internal position to an external position.

Joe: *Well, who've become your customers now? Did you have some autonomy at Xerox that you had let's say outside plans or anything? I mean who are your clients now?*

Patrick: Right, so internal to Xerox, we were pretty focused on internal Xerox employees and external partners. Right, so if we had a close working relationship with a partner, we would work with them. We made a clear decision that it was not going to be a profit center. We were not going to sell that as a service external. Everybody that I worked with internal to Xerox were in some way related to Xerox directly. When I started doing this independently, just like any sales work, you leverage your relationships. The people whom you worked with in the past. Folks who through relationships with that I had worked through Xerox, who might need this kind of work. And, of course, the other important thing is, and that's valuable is to partner with, you know, other like-minded people, other consultants. So, you help each other out. You have different balancing skill sets, if they need some work, you can help, you know, help them out. If they need some work that you have a skill set for, they help you out. It's really all about relationship building.

Joe: *The foundation of ResponseAgility stands on the 3 principles, I think, that you use in your training: process, technical and personal agility. Can you explain how and why you combined these starting out as a new company?*

Patrick: Sure and this has been a foundation of my philosophy from the very beginning. I always, the analogy I like to use is if you want to have an agile business that is a 3-legged

stool that stands on these 3 pillars, right. It's process, technical and personal agility. You need all 3 of those if you really want to have a successful agile business. And, it makes sense because the world is changing, and it's changing rapidly and it's changing faster than it ever has before and in my mind, that's exactly what agility means. It's that ability to respond to that change, and you need to have all 3 of those aspects of your business to be agile.

Your processes need to be agile because as your customers change, as their requirements change, as industry changes or as your business changes, your processes have to be in place that are able to respond to that change. There was a time when we used to have things, you know, this false notion of change control. Like, we'll be able to control change. Well, that's just simply isn't true. You need to be able to respond to that change. So, your processes need to be in place to do that. For example, Scrum is a good example. It is built around the philosophy of adapting to the change that is happening around it. Now, if your processes can handle the change, well then, your code better be able to respond to change because if your customers come in and say, "Hey, I want this new feature." You better have had a well-designed, well-architected, well tested and, you know, system that is going to be able to respond to that change. If you have a brittle technology, and your processes can respond to change, your technology is going to crumble. You need to have that technical agility built in so that your product can respond to change as much as, you know, as your processes. And then, finally, it takes people to make all this stuff work. You know, businesses are not just a bunch of machinery and technology and such. It's people like people run this whole thing, and they're going to have to be able to respond to this change as well. Their roles and responsibilities end up changing. How they interact with people ends up changing. They need to be able to respond to this change as much as the other thing.

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You need all 3 of those things for you to effectively be able to be an agile organization. So, to me both principles are foundational. And so, you really need to focus on all 3 of those if you want to be successful.

Joe: *Do you go into a company and say "Oh, in this training we're going to roll out process, then we'll roll out technical" or is it kind of done in combination or on separate chunks or how do you normally do that?*

Patrick: Well, since they are so inter-dependent, when I teach this stuff when I train it, I do all 3 together because you really do need all 3. Essentially the way I roll it out is I overview the whole concept. "Here're the 3 things that we're going to be focusing on and describe why you need all 3." Just similar to what I just did. And then, generally though what I'll do is because you have to do this in order. You can't do anything simultaneously.

Normally, I have software developers in my class. I tend to start with the technical agility because that's the bread and butter. Like, that's what they do every day. They're working on the code. They want to know how they could work on code better. It really gets them focused on, you know, how agility can really help them in their day to day jobs. And then, I start layering on top of that the process agility and start showing how agile processes like Scrum can help them focus on what's important and really that's the keyword, focus.

The problem of course is we tend to work on too many things at once and nothing ever gets done. By having this process agility, one of the key things is being able to focus. Having that overlay on top of it explains to them why that process or that technical agility was so important if the world is going to be constantly changing around them. And then, finally I end up with the personal agility which really focuses on, you know, having this awareness of what they need to do and how they need to behave and how they need to be

able to respond to this kind of change.

That kind of wraps up the whole thing and then I typically will have a Capstone project week where after we've done all the training, we come together and we start applying these skills and these techniques on a real world project. They bring in software from their jobs and we apply all these stuff to a real world project. Just so they get some of that experience about this is what it feels like to make it all come together. Most folks come away from that capstone with a whole new appreciation and eye opening just like "Wow, this stuff can really work if, you know, if we put it all together it works well." That capstone turns out to be a, I think a really powerful and valuable part of the whole process.

Joe: *Give me a tip here because when I do these things, I just teach someone a PDCA cycle for a lack of a better analogy here. It always seems the A and the last thing adjust, everything else gets all the time, half a day for this and 2 hours for this, 2 hours that I always run over and then the last section ends up being 15 minutes long, okay. How do you stop personal agility? I mean does that give short changed or is that something that people really want to be addressed? I mean how important is that when it's the last thing?*

Patrick: It is really an important thing. What's interesting about it is its one of those concepts that is relatively simple to understand but extremely difficult to master. I can explain in a relatively short time how the process works. How your thinking works around whenever you're confronted with an issue or a problem, what goes through your mind and how you can address that. Conceptually it's pretty straightforward. The hard part is being good at it, and that takes practice. What I try to do is you set that up and can set it up, and honestly, it's probably just a couple of hour-module in the overall training but it's through the next, the capstone, where you can observe what's going on and you can kind of reinforce and coach some of those things. But, it really is a lifelong process. It's, you

know, easy to master or, I'm sorry, easy to understand, hard to master.

Joe: *Tell me a little about personal agility in some of that training because that intrigues me. I think most people, developers and the agile people that listen to this are used to being, the Scrum side and the technical side and everything but personal agility strikes a chord with me. I'm not sure everybody fully understands where you come from on that.*

Patrick Waara: This material is derived from a guy named Christopher Avery. He wrote a book called Teamwork is an Individual Skill, and he's somebody whom I've worked with, gosh now, it's got to be at least like over the past 7 years. But, this is really derived from his model that he has built. The first part of it is a descriptive model, it really is. It's just the way nature is, and the concept is whenever we're confronted with a problem we'd go through a very natural process of how we react to it.

For example, this is one of the examples I use in my course. This descriptive model that describes how we generally react and this goes across religion, its culture, its gender, it seems to be an innate part of how we are as human beings, when confronted with a problem we go through a series of study gist or steps. The first thing we tend to do is blame. We relay blame on somebody else. "Now, who took my keys? Why aren't my keys here? What the heck happened?" But then, once we realize that it isn't somebody else then we start to justify the situation. "It's not my fault. It's circumstance. I can't help it.

Something else external to me is making this happen to me." Once we get past that stage we move into a stage where they call it shame, where really we start laying blame on ourselves like "I'm such an idiot. Why did I do that?" We're still not being resourceful. We're still not at the stage of responsibility where we can do something.

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Finally, the last step is we get stuck in obligation, where we feel obligated to do whatever we're supposed to do. "Well, I guess I have to go to this stupid meeting. Well, I guess I have to do this." The problem is when you're stuck in any one of those steps that you're not resourceful. You can actually take control with your own choice and then the responsibility is really about owning the choices that you have in front of you. Okay, so you can't blame management. You can't blame or justify because "This is just the way it is in my company." You have to take ownership for the choices and what are you going to do about it. Once you get to that point, and that thought the process, that's when you can be, what I call, you know, what Christopher calls Responsible. You're in this point of responsibility.

There's this other process that you go through that can help you get through those stages which quite briefly is about, first of all, intention that you want to change, you want to do a good job. Awareness, you have to understand where you are in that responsibility chain, where you are in that process so that you could try to get yourself out to that next step and through the whole process where you can be responsible.

The last one is to be able to confront yourself and see what's really going on, and that's one of the hardest parts is, you know, being able to see 'how am I participating in this being stuck in this process'. Okay, how am I, it's this seeing the unseen. There's usually an issue where there're 2 counteracting intentions that's causing this problem. In a nutshell, that is what I mean by personal responsibility. It is about getting to a point where you can own the choices, or it's driving whatever issue that you'd have to deal with.

Joe: *I've read Avery's book and I think I wrote a blog post on it and called it the I-Team, okay, and the reason I did is because, you say it very well, is that individual responsibility comes before team responsibility, doesn't it?*

Patrick: Yeah, absolutely, yeah. He's actually coming up with a new book, I think in the upcoming years so I'm really looking forward to seeing that and like I said, I've worked with him over a number of years, and I just found this notion to be pretty profound and it's one of the things that not only do I apply in my training but I regularly apply in just day to day life, and it's one of those things that once you learn it, you can't unsee it. You start seeing all of those issues in your own mind and as you start something happens, you start laying blame, you go and "Oh, look where I am."

Joe: Do you see more development, personal development taking a hold at the corporate level where people are concentrated on these personal skills like this or is it still something that we're all processing technical? Is there more of attention being paid to personal training?

Patrick: I don't know. It's a great question. My reaction is that it should be where we spend a lot of our time because I think if you address both issues first, if you address those interpersonal teamwork issues prior to the technical things, the technical things would be easy, right, because it's the teamwork issues that are generally where the problem, you know, the root cause problems really lie and if you can address those, surface those and get through those the technical stuff tends to be easy. I think the reason we tend t do the hard technical problems first is because they're a lot easier to manage. It's a lot easier to measure. It's not soft and squishy. It's just; it's something I can put my, wrap my hands around, wrap my head around and say "Boy, if we do these 3 technical things, everything would be better."

The truth of the matter is if you've got underlying teamwork and interpersonal issues it's not going to make it better. It might make it some of the problems better, but the real

problems are still underneath the water line.

Joe: *Well, I think for years and year, we've been drilled in the Lean and Six Sigma world, okay, work on process, work on process, process is the problem, not people, and that's not necessarily so, is it?*

Patrick: Not necessarily, no. Is it important? Of course, process is important because, you know, even good people stuck in a bad process are going to have a really difficult time with their job and the same thing with the technical aspects, if you've got technical issues, you know, you can have heroic people working 24 hours a day but they're going to be beating their heads against some of these technical problems. And, that's again why, you know, I focus on those 3 legs of that stool because you really need all 3, right, you need, it's the people, processes, and tools. It's the same thing. You have to have all 3 of those cylinders firing to really, to be truly, truly successful.

Joe: *We have just discussed all this training. ResponseAgility, does it get involved in specific consultancy or other things?*

Patrick: Oh yes, sure. I mean, you know, training is important, but it's not always the answer. I mean sometimes training isn't what you need and training is never the only answer. I mean training is a means to an end. It is not an end of itself. I mean training helps people get educated and ideally you could get some experience by doing it and getting some hands on, but the ultimate goal is behavior change. You have to get people to behave differently, or nothing is going to change. That behavior change generally is going to require some level of coaching and or consulting. Whether that coaching and consulting comes internally through management or thought leaders or through someone like myself, an external consultant who can hopefully shed a new light on it or perhaps see

it with fresh eyes. You're going to need somebody to help you get through those difficult times. And, with trying to master any skill, you know, it requires practice and a coach because somebody needs to look at what you're doing and help correct you. I mean even, you know, even Tiger Woods has a golf coach, right? You still need people to help you through some of the tough bits that you're working on.

Joe: *But, even at Xerox you distanced yourself as sort of an external coach to a team, right? I mean and that's something that they needed. Would that be correct in saying that?*

Patrick: I guess it must be some and some. A lot of the organizations I worked in, they didn't know me, and it was basically "Hi. I'm from corporate. I'm here to help." I would come in and I would be that third party. I would be that biased voice, right? And so, that was, that could be very helpful from that perspective because sometimes they would come in, and I would validate some of the engineering's thinking to begin with. And so, that would help, or I would come in and coach people through and they would see this a, there's a saying that "Prophets never are a prophet from their hometown." The further away you are, the more respected you are. When I would come in as that external consultant, I would, it would lend a voice of authenticity I guess.

There were other groups I worked with, whom I had worked with for decades, they were people who I've been working with for 20 years. And so, when I walked in there I was more of a trusted partner. I think I would have a similar effect in the sense that I was not a part of their group, but I had this built in trust because they've been working with me for so long, so.

Joe: *I always claim the that the expert always carries a suitcase. And, the smarter you are, it coincides with how the distance you travel, okay.*

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Patrick: Yeah, exactly. Yup, the further you are away the more expert you are.

Joe: I want to shift gears just a little bit and ask you a question here, and it's, I think about Lean and it fits into the agile world really well and Six Sigma struggles a bit. You are a Lean Six Sigma Black Belt in that Software and Agile world. Is Six Sigma to rigorous for Software folks or where does that stand now with you?

Patrick: To me, the big takeaway from Six Sigma, the whole Six Sigma movement is the importance of data, to use your data, your measures, your metrics, to help you drive your decisions. From that perspective, those concepts are very valuable, right, and agile uses a lot of data, for everything from, measuring your velocity to your coat coverage for your unit tests to your defect rates. Collecting that data, collecting those measures and metrics and using them intelligently I believe is what Six Sigma brings to the table.

Six Sigma has a lot of tools in its toolbox, and some of these tools are useful to software developers. There's a form of DOE that is highly valuable for when you're doing testing. If you create a combinatorial, essentially the concept is most defects appear on either a single factor or a combination of factors or a pair of factors. You can construct a combinatorial test matrix that will allow you to test, you know, huge systems in a minimum number runs. I was working with one client out in India who they had this one web system that if you did like a full matrix of testing, would've been over a million test cases, right. So, they weren't even testing it. They would spot test. They would try this. They would try that with no real rigor. So, the system was never really truly tested.

I taught them this Six Sigma technique of combinatorial testing, took those million combinations down to 300. They automated those tests and from that point they were

doing full testing of their system for the first time and they were doing it in a minimal number of runs and they were doing it in the automated fashion and it would take under an hour for them to do a full test of their system which they had never done before. That was Six Sigma. I mean that was a valuable tool from the toolbox that we could apply to their situation.

There're other tools that could be more useful for management or process improvement people. From my perspective, Six Sigma and Lean for that matter, they're your tools you have in your toolbox, and you pull them out when you need them. You use the right tool for the right job, you know, and trying to force fit things where I think, you know, Six Sigma got its bad rap was, you know, everything looked like the DMAIC project. And so, they'd make everything a DMAIC project and they would go through a lot of ceremony and rigor and that often times would slow things down. I think sometimes people misapplied it or maybe applied it for the wrong purposes. And so, it started to generate a bad rap but if you just, if you use it for what it is like, you know, a good set of tools, there are some good tools there.

Joe: Patrick, being in Hawaii, do I need to get to go there to get training from you or do you come to the States?

Patrick: Well, no. In the spirit of Gemba, I tend to go where the client is, right, that's where the work is taking place, so that's usually the best place to start effecting any kind of change in the organization. Generally, I will come to you. Well, that is not to say that I wouldn't be offering some of this class work in Hawaii one of these days, and I'm sure there'll be several people who would love to come there for training. But, so far it hasn't happened.

Joe: *Is there anything you'd like to add or tell me about that maybe I didn't ask?*

Patrick: I think you did a great job of covering a lot of the points and thanks for the opportunity, for giving me to, you know, talk a little bit about my new consultancy and a little bit about what it's all about, Hopefully, people listening to this will see where I could help them out.

**Joe:** *What's the best way for someone to contact you?*

Patrick: The best way to get a hold of me is e-mail because no matter where I am in the world I will get my e-mail. That's not always true with the phone. There's been no place that I've been where I haven't been able to get that. Go to my website, contact me through that and then once we get the initial contact, we can always set up, you know, a meeting for us to discuss any details that need to be discussed.

Joe: *And, your website is?*

Patrick: It's ResponseAgility.com. So, those 2 words, responseagility put together, no spaces .com.

Joe: *Okay. Well, I'd like to thank you very much again, Patrick. It was a pleasure, and I look forward to hearing more about what you're doing later. The podcast will be available in the Business901 iTunes store and the Business901 blogsite. So, thanks, everyone.*

Patrick: Thanks, Joe.
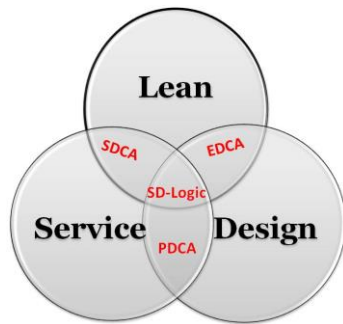
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