



Agile Communitites

Guest was Alan Bustamante

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Agile Communities

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Transcription of Interview

Joe: *Welcome everyone. This is Joe Dager, the host of the Business901 Podcast. With me today is Alan Bustamante. Alan is the founder of Xcelerate Partners in Cincinnati, Ohio and has been helping organizations adopt value driven and innovative software development practices through his work as a trainer and a coach. He has personally trained hundreds of software professionals on Agile software development, Scaled Agile Frames, and IBM Rational Unified Process. Alan is active in the Agile community where I first was introduced to him through his work at Agile Cincinnati. Alan, I'd like to welcome you and Agile Cincinnati had a very active membership back then, is it still that way?*

Alan: *Oh yes, absolutely and, first of all, Joe, thank you very much for bringing me on here to your podcast. This is a great privilege and honor. I really appreciate this. Yes, so absolutely. Agile Cincinnati has grown tremendously since I joined way back in 2010. My wife and I moved to the Cincinnati area in 2010 as part of her job. She's a pediatrician at the Children's Hospital here. And I think back then, we were fortunate to get maybe 10 people to a meeting. We didn't really have a lot of coordination and what I would say organization around building the group, so one of the things I did when I came in is to get*

the group a little bit better organized. And just in the last I'd say few years, a couple years maybe, we've been getting around 30 to 40 people in attendance at our meetings which are great, and it's a great diverse audience. So, in the beginning, we were getting pretty much the same people, and now we're getting people from all different backgrounds and different people at different meetings, and really trying to find that sweet spot of finding the programs that matter most to our members. The last time I checked in our membership database, we were up to 850 names, almost 850 names, so that's really exciting. I have to say Joe that this would not have been possible at all without the people that are on the leadership team. People like Peg Haustetter, Levent Gorur, Stephen Wagner, Peter Wendler, Don Miller, and just recently Diana, who has come on to our leadership, and so I just wanted to give them a shout out because our organization would not be where it is today without them.

Joe: *That's nice of you to do that, and it's a fantastic group. The people over there were very engaging when I was there and talking back and forth, and I'm glad to hear that it is one of the more popular Agile communities that I know of and in Cincinnati, it doesn't necessarily seem to be the hot beta software. What's going on?*

Alan: Oh yes, so what's been great about it is now, we're venturing into new territory. The last meeting we had an open space where one of our newest leadership members, Diana brought a lot of different individuals together to do an open space and that was new for us, and we saw a different group of people coming for that, so some people want to come and sit for a presentation, others want to be kind of active, and network, and be involved, and engaged. When I started, it used to be said that Cincinnati was 10 years behind Columbus,

but I think since we've really seen Agile Cincinnati explode, we've shrunk that distance. I think we're probably on par or getting there. I know personally there are several organizations here in the Cincinnati area that are very interested in Agile adoption. I'm part of one of those, so it's a very exciting time for Cincinnati.

Joe: *You ventured out on your own a few years back, can you give me the elevator speech on Xcelerate Partners?*

Alan: I always find it challenging when people ask me about that because I see a lot of great things happening right now and what I really like to tell people is that we're about helping organizations build better products and doing that through making good teams, good software teams, better software development teams and I would say that's probably the best way to describe it. I'm working with a client right now that's got many teams that we're helping along the Agile path, and they're all great people, or they're all very good software developers, but the value add that we're providing is helping them bring better organization and better value so that they can serve their customers, not only external but internal customers as well, in a better way.

Joe: *What prompted you to venture out? Was there like a life-changing event or anything or was it just time?*

Alan: Actually, I wouldn't say a life-changing event as much as it was my wife whom I love near and dear, and we are celebrating our fifth anniversary today which is an exciting time

for both of us, so I would have to say she's been my biggest champion in this. In the last few years, she's really seen the need for the services that I've been providing, on the training but also on the coaching level. Shortly after we moved here, I joined a small software company, and I had just left there, and she just asked me one day, you know you have all these people asking for your skill set, why don't you look at going on your own and trying that out and see how that works for you. I did that, and that was at the end of 2002, and then I haven't looked back. It's been a great experience, and I've got to date, every year has been a better year. I can't expect that, of course, every year but since the inception of Xcelerate Partners, it's been good, very good. So I have to really just recognize that my wife has been my biggest champion, and she's really the reason why Xcelerate Partners is here today.

Joe: *That's pretty exciting. That's good to hear. Well, I assume that most of your work has been with let's say Agile software developers. What are some of the key areas that you help with?*

Alan: I don't actually write the code anymore; I'm more on the process side and I find where I'm most effective is really helping organizations trim the wastes. You're a Lean guy; you understand the 7 wastes, and all that. Waste might be an excessively long meeting or developing chunks of work in large batches, so that's the value add is where I come in and help them find ways to reduce that size. So, to be more tangible about it instead of delivering an incremental software and let's say six months or a year, they're doing it in a shorter time as two weeks or two to three weeks. That's one of the big things, and then also teaching

effective communication skills and facilitation skills, helping them to develop that continuous improvement mindset.

Joe: *Have you found it takes an outside person looking in to be able to do that or do you have to quickly become part of the team and a facilitator, you know, as a team member? I mean, how does that work a little bit?*

Alan: I think that's the value of having someone from the outside coming in is these are people who are not ingrained into the day to day political structure, organizational structure of the business, and so someone with my background can come in and I've worked with like you said in the intro, in the last 14 years or so, I've worked in many organizations both as an employee and as a consultant in many different industries and so I can bring that experience in and take a look at processes and kind of see where the gaps are and help them be more effective. A lot of companies think that they're so complex. "Well, we're too complex..." I see my job is helping them reduce complexity. No matter where you go, software development is software development. Certainly there are unique circumstances, like when a company is smaller versus a larger organization and that kind of thing, but at the end of the day, we're still writing code, and we're still pushing that out to some customer, whether it's an internal or external customer. And so what I like to do is to really come in and help these organizations simplify their operations and it helps to be an external partner in that. Because if I'm internal, and I've seen this before and part of what I help organizations do is transition a lot of the work that I doing today to internal people, but it's always good to have that external eye because then they're not involved in the structure. I don't have to

worry about reporting to someone who is going to – or my bonus or my raise is going to be affected by a decision I make or a recommendation that I make. I'm totally disconnected from that, and I think that's really the power of having someone who's external to the organization come in and help the organization through these changes.

One of the things that I always ask organizations is when they say they want to go through an Agile adoption or transformation or whatever you want to call it, they want to become more Agile or develop more agility, why? Why do they want to do that? Because, especially for larger organizations, it's a big change. It takes a big responsibility to do that, and it does require money obviously because more often than not, you need to bring in external consultants to help the organization through that change.

Joe: *I thought all software teams are Agile now? Some are still not? What are the ones that aren't?*

Alan: You would think that, right? I've talked to a lot of people coming out of college that are coming into these organizations and to them, they're learning this stuff. It's like, this is stuff that they're learning in school. We were joking the other day about how some of the other professionals that I work with in my business, we were talking about the next 10 years; we'll probably all be out of jobs. Or hopefully, at least, the smarter of us would probably be on to the next something or whatever that is, but a lot of these kids coming out of college now, they're coming with that mindset, like they're telling us, oh yeah we've already learned about Scrum, or Kanban or all those other stuff, but there's still a big base of people who

have not gone through any kind of training or adoption or coaching. A lot of organizations have not and often what I find is that organizations, they may send someone to a class or maybe a team to a class but when these people get all jazzed up about agility, and then they come back to the organization, and they hit the politics or the organizational structure that slaps them back down. So they kind of adopt a few things, like maybe they adopt a daily Scrum or stand up at 15 minutes, but they're not really living the values and the principles of agility. And some of the things that we talked about earlier like continuous improvement, and building a close relationship with the customer, and those kinds of things.

It's a long way to go I think. It's sort of this false sense of agility that companies will have. They think they want to boil it down to a process. We'll just pick up the process, and we'll be Agile. But then when they dig deep into it, and they find out that things aren't changing, and then they bring someone in like myself to look at what they're doing and we go, well I might say, okay so you're doing a 15 minute stand up or something but really, you're not living those values of that open dialogue, the communication, the continuous improvement, building a trust fold and transparent environment. We want people to be able to bring issues to the forefront. Just like in Lean, right? To pull the line or pull the cord scenario where anyone can stop the line in order to fix an issue. We want that. And in many of the larger organizations that I've been in, of course, that hasn't been the mindset. It's been more of a shoot the messenger type mindset. So I think there's a lot of work to do there. You know, there's a saying out there, 'Agile in name only.' So a lot of organizations have not started on the path, a lot of organizations that have started down the path but have this false sense of agility, and then there are obviously case studies out there which I think has helped our

progress in the Agile industry, companies that have been very successful. They're doing all the right things not only on the technical side but also on the people side. People are a very important component of Agile adoption for sure

Joe: *We see that throughout the industry. Every organization is Agile these days. You kind of eluded to it there before in our conversation. How has that affected your work or other parts of the organization are saying, we all need to have daily stand-ups. Are they taking the tools and maybe not some of that real Agile spirit?*

Alan: Yes. I think the great thing about what I'm doing right now with another current client is it's more than just working with the software professionals. It is an organizational change. These opportunities don't come along very often, where you get to affect change across the organizations – sales, and marketing, and human resources, and all those require different skills sets. Most of my background is working with the software development folks and product folks because any Agile transformation is going to require the business lines talking to the engineers. That without a doubt is critical to a successful Agile adoption. But in the organizational change initiative, you've got other areas that may not even really touch engineering, but they're still interested such as human resources. We really want to bring in a lot of those lean concepts, and so we have specialists that can come in and help those individuals out.

But yes, I think a lot of the focus is on results. We want to be able to see results from the changes. I've seen this time and time again where even teams like I would say the intangible

results where people are talking more to each other, they've got very high morale, they see what other teams are doing, and they're like, "Hey, I want that Agile stuff. I want to be more Agile like these other teams. I've heard such great things about it." These guys are going out and celebrating together, and they see the results of the work much sooner. No one wants to be on a project where they don't see the end result until six months down the road or a year and the most likely scenario, a year down the road, and nobody knows what that's going to look like. And then there's a slow slug towards that end result.

When other teams see teams that are delivering something in a matter of a couple to a few weeks worth of time, and then they're celebrating those successes, then that just builds within the organization and over time, you see other areas of companies wanting to embark on the same journey, and that's where you get into things like sales and human resources and those areas, and then we bring people in that can help in those areas. So yes, but I think you have to start with results first, and more often than not, someone like myself or one of my colleagues would have brought in to work with engineering and the product side of the house and then that would just proliferate over time to other areas of the organizations. But it's exciting to watch. I probably see that less where it gets into places like marketing, sales, HR, less than I would like, but it's a great thing to see when it starts to happen when I do get those opportunities.

Joe: When I present Lean let's say to sales and marketing, I always start with the people and say, what's the reason that you want to have Lean in sales and marketing? Like, what's the business reason because they always seem like, oh we're a Lean organization, and we

want that, and we need to get rid of the wastes in sales and marketing, but typically, there isn't a good business reason to do that. Do you see the same thing when we coined that word Agile, to go to the other parts of the organization? Do they really recognize that they have to have a business reason or how does that work?

Alan: I guess, the one thing that I would highlight is we are in a great time of change and every year it seems to be that you're having to be more responsive to that change, what the market is dictating. I think in the past, the changes have been slower, and the ability to meet those changes have been slower. And now the organizations have to respond to that change, and that's probably the biggest factor I would say that I have seen in being able to get Lean in the other areas. The word Agile to me is just part of the big thing of Agile or agility is responding to change; that's why you're Agile. The market dictates one thing, and you have to react to it in some way. How long does it take you to react to that? We see that across the board in all types of industries where the various entry have been really high, and now you've got some upstarts coming in and challenging the status quo.

The example I would cite there which is in the current industry that I'm working in with a client, the Startup Square, they're impacting the payments industry, and larger organizations are having to respond to that. They're making acquisitions to be able to respond to that. But internally, they don't have the capability to do that. Internally, they don't have the capability, so they go out and acquire a company to be able to address a market need. But I think the word Agile to me is I like the word, I hear it a lot, not even in reference to software development or anything, I don't think Agile is really tied to any one specific industry or

business. It just is a great word to describe how someone or some organization is going to respond to change. And like I said, we're in a time and place in this world where people and organizations are having to be very responsive because things are changing so quickly. Technologies are changing. The way that companies talk to their customers and service their customers is changing. Yes, I think it's a great time to be using the word Agile or agility and introducing that word into other areas of the business.

Joe: *I have to ask you this just maybe for clarification, especially for non-Agile practitioners, is that Agile doesn't mean that I just walk in each morning and see what's laying on my desk and respond to immediately the last phone call, does it? I mean how Agile do I need to be?*

Alan: Yes, that's another great question because I think of – and I apologize because I can't think of who coined the phrase, but there is this saying in agile development called 'the last most responsible moment.' We're going to delay things until the last responsible moment. So that doesn't mean there's no value in planning; it just means we're going to make decisions when the last moment that that's not going to destroy us or put us at a negative risk because it acknowledges that change, that perpetual change that's always happening. Think of Agile planning as the last most responsible moment; planning very small chunks of time. Instead of we're planning something out for six months to a year, let's plan maybe a few weeks at a time and this is what I'm working on with an organization right now is looking at maybe up to a quarter's worth of work, but not really saying that this is a fixed scope of work, but at least giving some foresight and some amount of planning into the organization so that they can see what the roadmap looks like. Along the way, we want to

make sure that the organization has room to make pivots and course corrections.

Going back, I wouldn't say that there's no planning because you need to be able to plan something to coordinate effectively. Because all these projects, I mean unless you're a one-person team organization, you're going to have to coordinate with somebody and often times, especially within large organizations, we're talking there may be dozens of people coordinating on a single initiative, and that requires planning. That requires planning. It doesn't necessarily mean you need to plan out a year in advance, but you're going to need several weeks, maybe a couple of months, two or three months worth of look-ahead time to see where the group is going. Planning is definitely necessary without a doubt. Agile does not mean no planning. There needs to be enough planning to coordinate people and get everything aligned, but doing that up until the last most responsible moment so that the organization can make those changes and pivot whenever the market demands it.

Joe: *In my idea what you're saying is we do still put that road map out there. We still do the scope kind of in that vision of where we're going with the project. But then, as things are farther out, they're less granular, and as we bring them in closer, we start putting granularity to it as we get close to the last responsible moment. Would that be a good way to put it?*

Alan: Yes, absolutely because from today looking out, I don't know, three months from now, yes it's much less granular, and we don't want to put a lot of effort in getting too granular at let's say the three-month mark. That would be a waste. That would be a waste

of time to get too granular because the expectation is, we're already coming into this process with the expectation that things are going to change. We know they're going to change, and when we put a lot of effort into sizing things or discussing things at a very granular level for things that are going to happen three months from now, then it's much larger to let go of those plans because we put so much time and money into them. The art of Agile development, part of the art I should say because there are many things out there, but part of the art is embracing change. Embrace change. And the less vested time and money we have vested into that detailed planning for three months or six months or a year from now, the easier it is going to be for us to embrace that change. So yes, more granular upfront for the near term things; that will give us an idea of how much we need to invest, how many people, how much equipment or whatever we need to put to an initiative in the short term and then in the long term, getting a sense for that as well but only focusing at a granular level in an immediate short term which is a few weeks ago.

Joe: *Is that one of the big challenges of adopting Agile at Scale? I mean even for an organization just outside of software, is to have that mindset to kind of leave some fuzziness out there in the future?*

Alan: One of the big differences, of course, is sheer size. A small team can come in and maybe I'm there for a few weeks, working, doing some training, and then I'm coaching, which is I'm working with the teams directly in a one to one mode or one to many mode, I would say that coaches are going to teach for one, they're going to mentor, and then they're going to model. Or even I would say probably model first and then mentor the behaviors

because just teaching isn't enough. You need the coaching in there to be able to support the change. I guess as I said earlier, sometimes companies would want to send people to training, and then they expect the change to happen by bringing them back into the organization and sharing what they've learned, but that is often not a recipe for success. I would say 9 times out of 10; you're going to probably need a coach. You will need a coach coming in to help model the behaviors. Now that the team has been trained modeling some of the behaviors and then doing the mentorship. And with a small team, let's say one small team of 7 to 8 people or maybe you've got a few teams around that size, that could be done over several weeks to a few months.

With Scale now we're talking a much more complex organization because we're talking a large team of small teams. Teams of teams as some people say. We're talking an initiative that has maybe 40 to 50, upwards of 100 people delivering on it and having multiple numbers of those, but also the technology stack is much broader and deep. You've got a broader, deeper technology stack, you've also got challenges with third-party vendors, so a lot of large organizations are dealing with not just internal employees and one or two other vendors, insert name of XYZ consulting company, but they've probably got maybe 5 to 10 core vendors that are serving them by helping them staff their projects with software developers, engineers, testing and those kinds of things and their own internal processes are different often than the customers, my customers internal processes. I'm coming in and helping them, helping my customer, but then at the same time I've got to help the vendor's customers because that's part of the compact or the contract I should say for bringing an organization into the Agile development world.

In fact, I had someone ask me the other day, why are we even training these folks. Training their partners, their vendors? I said, well that's just part of the deal. You know these people are part of the team. When I come in, I don't just train your employees. If you have vendors or partners that are on those teams, they need to be trained too. That's how you build an Agile development team because it's one team. There is no your team members and the vendor's team members. They're all one team. That's a challenge.

And then there's the sheer distribution. Often times in at Scale, one large organization here in Cincinnati who I was no longer helping but had helped a couple years ago, we had a product owner in Germany. We had software engineers in Bangalore, India. We had testing in China. I had one test lead in Canada. Trying to orchestrate that group of people around Agile development which requires a lot of close contact and communication and transparency, the product owner works for the client, for my client, and the testing as one vendor, the development was another vendor, so you might imagine the complex scenarios of scaling agility too much larger organizations there. It requires a lot of different tools and techniques to be able to manage that.

Joe: *You know what we've left out of this conversation a little bit and probably a great place to end it is the role of leadership in the development of an Agile organization. In Lean, we always think that leadership needs to be on board, and we don't talk about just being on board, we're talking about they need to be at Gemba. They need to be practicing Lean themselves. And you know as I always put it, you got to be on the same boat, in the middle*

of the lake, with one of the oars. How does that work in Agile? Can I just say, "Oh we're going to become Agile. You guys are Agile." Go get trained and be Agile.

Alan: You mentioned one of the keywords that I like to use which is the Gemba; dealing with the Gemba as they say in Lean and I've been very vocal about that. Leadership, to answer your question more directly, leadership absolutely plays a critical role in this. And it doesn't mean that they are necessarily following some process like Scrum for example or Kanban or whatever, it doesn't mean that they're following a process necessarily, as much as they're exhibiting the ability to lead knowledge workers because that's the domain I'm in. And I would say even in manufacturing these days, you really have to be a skilled worker to work in a manufacturing plant now with all the technology, because a lot of the stuff is done by robots and machines, using computers to drive them. So it's this high-tech manufacturing word that's been tossed around a lot. And so in those cases, now we were seeing almost every type of worker across multiple industries and certainly in my industry in software that you're working with knowledge workers and those workers need to be treated as like that they are the ones with the knowledge. They are the ones who are providing the expertise. They're living, breathing, thinking individuals and so it's less about a process I think for leadership, as it is understanding how to lead those knowledge workers.

One of the things that I do emphasize with my customers at the leadership level is, and of course, we have training that we take leadership through. One of my colleagues Skip Angel, he just created a class called Agile for Leaders for our client. It's a great class, and it talks a lot about personality styles and certain leadership, and that's great. I think all leaders, any

Lean thinking leader needs to go through some sort of training to understand how to better lead knowledge workers. In the old days, Frederick Winslow Taylor who believed in more of a directive approach and a lot of our management styles have come from that old mentality whenever that was, in the early 1900's I think of directive style management whereas now leading, we're saying it's less about directing and more about facilitating and making sure leaders are leading through serving. Removing blocks, or making a work environment that's enjoyable for their people, and trusting them to do the work in a good way, and to provide value in a quality product, and really just facilitating their needs.

Part of that, going back to what you said about the Gemba, when I'm working with leaders, yes they do the training but then also, I try to get them to go out and go to the Gemba, go out to where the work is done, even at the senior leadership levels. I've had people say, "Geez, my day is so busy already, and you can't really expect me to go to every single team and see what they are looking at or working on." And I tell them, I'm not asking you to do that every single day but maybe once a month, you pick a team or once a week, or however often you feel like you can dedicate to this. Some are better than none. And try it, maybe you go visit the team once a month and if you find it enjoyable and it's very productive, and the teams enjoy it which I'm sure they will, then maybe you do that once every couple of weeks and experiment. But you're taking an attitude of going to the Gemba and seeing where the work is done and talking to the people who are on the floor, it doesn't have to be manufacturing floor, it could be the people that are building that software product, and talking to them and finding out what are their struggles. How can they as leaders help improve their business by improving the environment that their people are working in.

And part of that is also encouraging this idea of open communication and transparency. Because a lot of organizations that I go into, either they have the mentality or the culture if you will which is a big part of what I do and when I'm working with these other coaches is to help change the culture. Changing it so that they're not in this shoot the messenger mode which unfortunately a lot of organizations that we see and I guess part of the reason I stay employed is because these organizations are somewhat dysfunctional, but getting them to change their culture so that it's not to shoot the messenger but to embrace that openness and transparency, and that to me is what Lean leadership is. It's that leading through serving, creating that open, transparent environment so people can feel comfortable coming to them and talking about the issues without having this fear that it's going to affect their next raise or bonus or being shot, or they're going to be given the pink slip and those kinds of things. But yes, absolutely, I find leadership is absolutely critical. A lot of organizations start from the bottom. They start to change from the bottom, and that works for a little bit, but the rocks that have to be moved at the bottom level or I guess what I'll say is the rocks that can be moved are really the small rocks. It requires leadership to come in from the top to help support and move the big rocks. And so absolutely, we need much more leadership training and coaching out there. We need more than I see today but definitely a key component.

Joe: *I thought one of the things that Vincent of Personal Kanban wrote about one time and he talked about a Kanban boardwalk, of walking down the boards and everything and I saw what a leadership walk is to walk down in front of all those Kanban boys and experience a*

daily meeting once a week or something like that. You don't have to go in there and say, oh we need to be doing this and doing this, and just listening to the daily meeting in front of a Kanban board right?

Alan: Yes, absolutely and certainly leaders can adopt those processes for managing the flow of work. I do help leaders with that as well, and part of adopting Agile and Scale is controlling the funnel of work that's coming in and flowing down to the teams and at the portfolio level often requires some view into the organization, the amount of project work, or the initiatives that are being created. Yes, absolutely, that kind of tooling, having the board, being able to look at the board, and then discuss with anybody that's considered a stakeholder, for sure.

Joe: *I could go on and talk to you for hours here Alan, and I do appreciate your time here, but lots of exciting things are happening in your household. Tell us what's on the horizon professionally for Alan and Xcelerate Partners?*

Alan: Thank you for asking Joe. Yes, for right now, I would say my plate is actually pretty full with what I've got going on which is a great place to be in. But I think looking into the future and certainly in the next year as we close out 2015 – it's hard to believe we're at the end of 2015 already, but I think the next thing I want to tackle, and this might sound crazy, but I want to start recording some online classes. I've been taking a few myself, and there's a lot of content delivery services out there, so my next venture is to see if I can put some courses out online. I think I've got the content, but the key for me I think is finding a partner

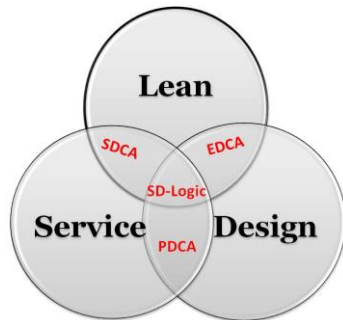
who can help me to communicate that message in a creative and an engaging way. I've taken some classes that have been very engaging and even though they're online; they keep my interest. And I've taken some that have been so-so, and I think that probably is going to require some coaching for myself on that part because I think you have to definitely have a good personality to be able to pull those kinds of things off and make it interesting. But I'd eventually like to be able to create a class or classes online and then be able to sell them through some content delivery network. But that would be next on the horizon for me as my next goal, as far as Xcelerate Partners.

Joe: *That sounds exciting, and it's a lot of work, I'll tell you that. Before you go too far down that path, it's a lot of work.*

Alan: Yes, maybe you and I can talk more about that and get your shared experiences.

Joe: *We will sometime here. So, what's the best way for someone to contact you and learn more about Alan?*

Alan: Well, you can catch me on the Web. My company is Xcelerate Partners, but that's with an 'X.' So it's X as in Xavier, c-e-l-e-r-a-t-e, partners.com. Or you could go to IncreaseAgility.com, and that would take you to my company's Website. And then you can also reach me via email by my first name, Alan, a-l-a-n, @xceleratepartners.com.



Joseph T. Dager

Business901

Phone: 260-918-0438

Skype: Biz901

Fax: 260-818-2022

Email: jtdager@business901.com

Website: <http://www.business901.com>

Twitter: [@business901](https://twitter.com/business901)

Joe Dager is President of Business901, a firm specializing in bringing the continuous improvement process to the sales and marketing arena. He takes his process thinking of over thirty years in marketing within a wide variety of industries and applies it through Lean Marketing and Lean Service Design.

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