



AGILE PLAYBOOK

BRINGING
AGILITY
TO LIFE



LIFE IS FOR SHARING.

HR DIGITAL & INNOVATION / HRM-ORG

INTRODUCTION

Dear Colleagues,

After living in the shadows from general management for well over a decade, the concept of agility is now spreading its way out of the IT niche throughout our whole organization. This is certainly due to the big consulting firms' communications efforts, but also a result of the true success stories in several DT units, as well as at ING, Spark, or Zalando. These companies have in common that they do not equate 'agility' with the deployment of agile methods or the implementation of the Spotify model. They have understood that - to use the full potential of agility - you have to look at the concept in its entirety. Adaptions in six dimensions are required, which we summarized in the agile compass (p. 11).

For each of the six compass dimensions we conducted in-depth interviews with colleagues from all over the Group and derived the most pressing HR-relevant questions based on the articulated challenges. This playbook provides answers to these questions and therefore addresses everyone, who already started to become agile or who wants to, should, or was asked to start soon.

We invite you to explore **18** How-to-Guides (HTG) to better understand

1. what is the respective target level,
2. what is the way to get there,
3. how others succeeded and overcame challenges, but also
4. which (mostly) HR-products are already available within the Group to awake agility.

It is in the nature of things that our answers will raise further questions. Of course, we are also convinced that there is no 'one-size-fits-all' solution. Every organization has to find its own answers. Anyways, we hope that this playbook will help you start your agile journey with inspiration and motivation and will provide guidance and valuable support on your path to more agility.

Yours,

Agile Blueprint Project team

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WHICH INFORMATION IS RELEVANT FOR ME?

If you want to...

Target Image	Primary Target Group	Considering your selection, the following HTGs with the underlying questions are relevant...
...use agile ways of working	Leaders / Team Members	Get to overview
...develop a full agile operating model	Org. Unit leaders/ HRBPs / Leaders / Team Members	Get to overview

...use agile ways of working

SUMMARY OF RELEVANT HOW-TO-GUIDES

Compass	HTG	Key Questions	Linkage	
Overarching	Introduction to agile	What is agile, why is it relevant for Deutsche Telekom and what is the aspiration?	Further details	Directly to HTG
	Purpose	How to anchor business objectives, business criteria and purpose?	Further details	Directly to HTG
Org. Design	Roles and responsibilities	How to define roles & responsibilities in Flexible Organization?	Further details	Directly to HTG
Leadership & Mindset	Sharing Mindset	How to develop a sharing mindset?	Further details	Directly to HTG
Work environment	IT tools to improve collaboration	How to choose the right it tools to improve digital collaboration?	Further details	Directly to HTG
Way of Working	Agile methods and frameworks	How to choose the right agile methods and frameworks?	Further details	Directly to HTG
	Agile Meetings	How to set up meetings for agile teams?	Further details	Directly to HTG

Note: the agile aspiration in the HTG describes the design criteria for achieving the optimal target state of an agile operating model. The agile aspiration thus did not reveal the present conditions at Deutsche Telekom.

...develop a full agile operating model

SUMMARY OF RELEVANT HOW-TO-GUIDES

Compass	HTG	Description	Linkage	
Overarching	Introduction to agile	What is agile, why is it relevant for Deutsche Telekom and what is the aspiration?	Further details	Directly to HTG
	Purpose	How to anchor business objectives, business criteria and purpose?	Further details	Directly to HTG
Org. Design	Archetypes	How to define the archetypes of Flexible Organization?	Further details	Directly to HTG
	Structure	How to define the structural elements for the archetypes of Flexible Organization?	Further details	Directly to HTG
	Roles and responsibilities	How to define roles & responsibilities in Flexible Organization?	Further details	Directly to HTG
Leadership & Mindset	Leadership Mindset and empowerment	How to develop an agile leadership mindset and empowerment?	Further details	Directly to HTG
	Sharing Mindset	How to develop a sharing mindset?	Further details	Directly to HTG
Governance	Business steering & budgeting	How to steer your business in an agile environment?	Further details	Directly to HTG
	Interfaces with legacy org	How to manage interfaces between agile and traditional parts of the organization?	Further details	Directly to HTG
	Resource Management	How to ensure that agile teams are equipped with the resources required?	Further details	Directly to HTG
	Collaboration Framework	How to develop a collaboration framework as a basis for agile transformation?	Further details	Directly to HTG
Work environment	IT tools to improve collaboration	How to choose the right it tools to improve digital collaboration?	Further details	Directly to HTG
Way of Working	Agile methods and frameworks	How to choose the right agile methods and frameworks?	Further details	Directly to HTG
	Scaling	How to scale agile?	Further details	Directly to HTG
	Agile Meetings	How to set up meetings for agile teams?	Further details	Directly to HTG

	DevOps	How to set-up DevOps?	Further details	Directly to HTG
People	Performance Management	How to establish performance management in an agile organization?	Further details	Directly to HTG
	Career paths	How to structure career paths in an agile organization?	Further details	Directly to HTG

Note: the agile aspiration in the HTG describes the design criteria for achieving the optimal target state of an agile operating model. The agile aspiration thus did not reflect the current situation at DT.

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	Overarching
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1	Introduction to agile	Link
The following questions can be answered by reading this HTG:		Click
Definition – What is agility?		
DT-relevance – Why is agility relevant for Deutsche Telekom?		Click
Implications – What are the major shifts in the operating model?		Click
Target picture – How does the target picture look like?		Click

2	Purpose	Link
The following question can be answered by reading this HTG:		Click
Business purpose – How to anchor business objectives and purpose?		

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INTRODUCTION TO AGILE

WHAT IS AGILITY?

Agile organizations are designed for humans and businesses in the 21st century. They **combine dynamism and flexibility** with stability and efficiency to thrive in today's open, turbulent so-called VUCA (volatility, uncertainty, complexity, ambiguity) environment. Thus, agile means **being able to respond quickly** to changes by adjusting priorities and adapting the organization.

WHY IS AGILITY RELEVANT FOR DEUTSCHE TELEKOM?

People and teams working in **traditional organizational and operating models** are having trouble reacting **quickly** to customer needs and the so-called VUCA-environment. Many of them face divided and inflexible organizational structures, a culture that does not allow experimentation or tolerate failure, rigid processes, and a constraining work environment. **Cooperating efficiently across the boundaries** of geography, departments, sites, and functions **is essential for an organization to work in an agile way** in an increasingly dynamic market environment.

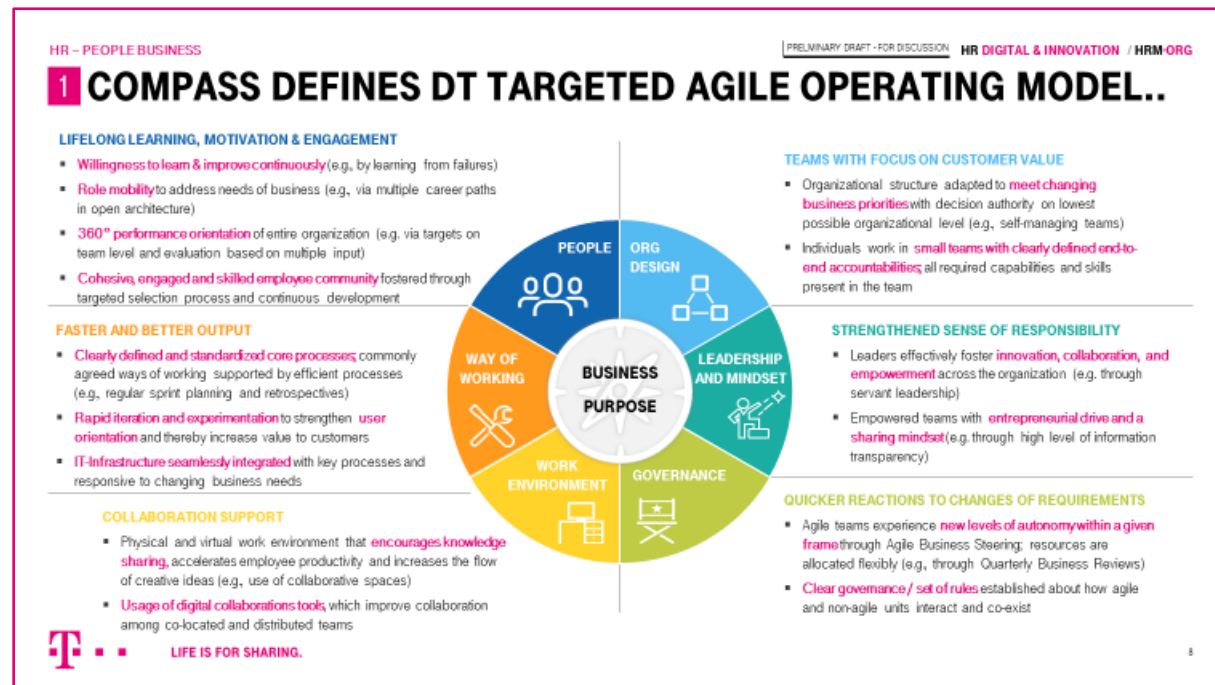
Imagine if Deutsche Telekom were able to **increase customer satisfaction**, while also generating **higher returns**, developing **better products** faster and cheaper, and **increasing** our **employee satisfaction**. And imagine if this were possible without having to go through disruptive reorganizations on a repeated basis.

WHAT ARE THE MAJOR SHIFTS IN THE OPERATING MODEL?

We aspire to transition to an agile operating model and organization. We recognize that we must undergo seven major shifts to get there.

Theme	From	To
Network of cross-functional, empowered teams for a responsive organization	Functions working in silos; limited ability for cross-functional teams to move with authority and speed	Small/self-steering teams with clear mission and end-to-end responsibility that can rapidly deploy; organized in as few layers as possible
Leaders drive change towards agile	Hierarchy of bosses who determine solutions and delegate tasks	Servant leaders who act as visionaries and coaches, who share power by decoupling functional and disciplinary responsibility
	Culture of “not my task” / “not my duty”	I make it possible and own it until we are successful
Rapid decision making	Escalating of decision making to top management	High-accountability roles and decision making within fully empowered agile teams
Next generation work environment	Rigid working places and complex IT systems	Collaboration and creativity enabled by simple & modular digital tools, rapid prototyping, and flexible project team area
Rapid iterations and learning cycles in daily work	Work carried out with detailed planning, and little testing and learning	Work carried out in short iterations with the goal of minimizing risk through testing and learning
End-to-end responsibility for outcome	From tasks within area of expertise and “hand-over” for implementation	Integration of thinking and implementation, not hand-over to achieve defined output
Dynamic people model that ignites passion, performance and growth	Static people model that follows formal hierarchies, with little emphasis on developing, attracting, and retaining talent	Culture focused on fostering, attracting, and retaining talent, through empowerment, continuous learning, and job satisfaction

HOW DOES THE TARGET PICTURE LOOK LIKE?



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PURPOSE

RELEVANCE OF BUSINESS PURPOSE

Having a clear **business purpose**, as indicated in the center of the DT agile compass, **serves as a basis for an agile operating model**, and sets the direction for agile teams and an agile transformation

The business purpose describes the main intent/objective of the business, e.g. why would the customer benefit from it? Thus, the business purpose not only provides the basis for the agile operating model, but also **ensures organization-wide alignment** and buy-in for vision, purpose, and imperative to provide clear direction for the agile teams—which in turn are anchored in the strategic objectives and principles of the agile transformation. This cross-organizational **alignment is crucial, prior to agile teams working autonomously**. For each agile unit (such as a tribe), this overarching alignment translates into a clear vision (what question should be solved?), metric (targets objectives and key results derived from vision) and architecture (logic when building the agile unit—for instance by segment or along a customer journey).

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A	Org. Design
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3	Archetypes	Link
<p>The following questions can be answered by reading this HTG:</p> <p>Agile aspiration – which design criteria are crucial to consider?</p> <ol style="list-style-type: none"> 1. What are the major shifts? 2. What are the required steps? 3. How to form flexibel organizational models? 4. What are the relevant archetypes for Flexible Organization? <ul style="list-style-type: none"> - Cross-functional teams - Competence hubs 		Click
<p>DT-relevance – which implications does this have on DT?</p> <ol style="list-style-type: none"> 5. What are the right archetypes for different DT business activities? 		Click
<p>Additional information: Where can I learn more about the topic and whom to contact?</p>		Click

4	Structure	Link
<p>The following questions can be answered by reading this HTG:</p> <p>Agile aspiration – which design criteria are crucial to consider?</p> <ol style="list-style-type: none"> 1. What are the major shifts? 2. How does the archetype influence the choice of the structure? <ul style="list-style-type: none"> - What structural elements are to be considered in cross-functional teams? - What structural elements are to be considered in competence hubs? 3. How to identify the appropriate structure? 		Click
<p>Additional information: Where can I learn more about the topic and whom to contact?</p>		Click

5	Roles and responsibilities	Link
<p>The following questions can be answered by reading this HTG:</p> <p>Agile aspiration – which design criteria are crucial to consider?</p> <ol style="list-style-type: none"> 1. What are the major shifts? 2. What roles do we have in Flexible Organization (archetypes)? 3. What are the tasks and responsibilities of the roles in Flexible Organization? 		Click
<p>Additional information: Where can I learn more about the topic and whom to contact?</p>		Click

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HOW TO DEFINE THE ARCHETYPES OF FLEXIBLE ORGANIZATION?

In this document we first describe the aspiration for agile businesses, then we establish the DT context. Note: a situational analysis is required to assess the applicability of the elements described in this guide to a specific business area.

This how-to-guide is particularly relevant for:

Target picture \ Target group	Business/org. unit leaders	HRBP	Leaders	Employees
Applying agile ways of working	This how-to-guide assumes a full agile operating model as target image			
Targeting a full agile operating model	✓	✓	✓	✓

1. Introduction

Why is it important?

A flexibel organizational structure can support the ability to react and adapt to constantly changing customer needs and internal/external requirement changes. Therefore, it is important to make a change from funktional silos to flexible structures with cross-functional teams. However, different business areas have different requirements due to the specific nature of their work; hence each business area requires a different type of Flexible Organization.

What do we want to achieve?

This how-to-guide offers an overview of two approaches to create a flexible organizational structure and how these can be applied to Deutsche Telekom. The overarching objective is to move to a more efficient and effective organization that is flexible and quick to react to challenges.

Good to know: the Flexible Organization is in Deutsche Telekom an additional organizational form and exists next to forms like line organization or project organization.

Agile aspires to achieve selected shifts in the context of the organization.

From	To
Functional silos	Collaboration in self-managing empowered agile teams
Complex hierarchies	Flat organizational structure
Top-down decision making and upward delegation	Responsibility and ownership distributed to teams

Note: The “From” dimensions serve an illustrative purpose and do not necessarily reflect the current DT reality.

2. How to get there?

What are the required steps?

To create flexible organizational models, a few questions need to be answered:

- How to form flexible organizational models: that is, what is the degree of organizational implication (“flexibel organization structure” in a Flexible Organization versus “virtuell overlay” in a project organization)?
- What are the typical archetypes?
- What are the right organizational structures to bring the archetypes to life—for instance, chapter, tribes, squads (*see how-to-guide “structural elements”*)?
- What is the split in responsibilities within these structures? (*see how-to-guide “structural elements” & “roles & responsibilities”*)
- What are roles that support these archetypes and structures—for example, chapter lead? (*see how-to-guide “roles & responsibilities”*)

When designing a Flexible Organization, the DT OrgProcess should be applied with its four phases (Idea, Concept, Negotiation, Implementation). (See link to OrgProcess in chapter “where can you learn more about the topic” in this document). To create flexible organizational models, a few questions need to be answered:

How to form flexible organizational models?

Agile teams can be formed with different degrees of organizational implications:

- **Project organization without org implications**
Virtual overlay to traditional org structure in project-like structure, i.e. line organization with flexible elements (e.g. tribes, squads etc.) or classic project organization elements. An example is TDG Tribeorganization.
- **Flexible Organization with org design implications**
Line functions are dismantled, and new org unit are created (with structural elements like tribe, squad & chapter). The leader of this org unit and the employees are dedicated to this org unit; the org unit is shown in the DT "Organigram."
An example is TDG PK Product Management.

What are the relevant archetypes for Flexible Organization?

Flexible Organization with org implications can be created with different archetypes.

1) Cross-functional teams (Archetype 1)

Description: Collaboration and development within a cross-functional team with End-to-End (E2E) responsibility to create and deliver a product, journey, process, or any creative customer-facing process. Employees with similar competences are dedicated in chapter and work within a squad for a limited period of time.

Structural elements of cross-functional teams:

- **Tribe:** Continuous responsibility for a common goal and consists of several squads
- **Squad:** (Temporary) association of employees with consistent responsibility for one goal
- **Chapter:** Assignment of employees according to skills. Employees are deployed in squads

When to use: Multiple, interdependent teams/individuals requiring multi-functional skills need to work together towards a set goal.

Typical business areas: Product management, customer journey, digital touchpoints

DT Example: Cross-functional teams (tribes/squads) for product development are grouped within the TDG PK Product Management as one organizational unit. Within this unit, team-members with different competences (e.g., developers, testers) work together to create and deliver a common product.

Must-have: It is important to separate the "what" from the "how" in cross-functional archetypes. Executive Committee and tribe lead decide business priorities ("what"), squad lead decides on what the priorities of the backlog are in line with business priorities set and the team decides on how to execute them. I.e., squad lead is responsible to "build the right thing" and team member responsible to "build the thing right". The chapter lead develops the resources/competences and has the disciplinary responsibility but does not make functional decisions for his people in the squads.

In addition, it is important that teams are established with full end-to-end accountability (i.e., employees are accountable for the comprehensive completion of a defined process, service or method) and are appropriately staffed (i.e., all employees have the skills necessary to reach the team's objectives).

2) Competence Hubs (Archetype 2)

Description: Bundling of experts with similar competences without "Regel-/Linienaufgaben", grouped in chapters and functionally allocated to different tasks/projects outside of the hub.

In opposition to cross-functional team, E2E / functional responsibility of the task/projects is with a requester outside of the hub. Competence Hubs are structured by 1 – x chapters, depending on the size of the hub (split by skill or expertise).

When to use: Environments with dynamic task demands (e.g., peaks and troughs in demand for one task); professionals have capabilities in different areas to meet dynamic demand. Day-to-day priority setting is done outside of the hub (i.e. by the business). Hub lead focuses on what adds real value to the business and staffs resources to business priorities.

Typical business areas: Key supporting functions (without decision –making competences)

DT Example: Software developers are grouped in one of several chapter within "Innovation Hub"; no "Regeltätigkeiten", primary, they are functionally allocated to different projects or squads outside the Org-Unit "Innovation Hub".

Must-have: In the Competence Hub it is crucial to free up the employees in the hub from standard line roles and responsibilities ("Regeltätigkeiten"/"Linienaufgaben"), so that they can be staffed and allocated in a flexible manner 100% dedicated on projects or temporary tasks outside of the hub.

Overall and independent of the archetype it is important ("must-have") that teams are formed and/or dissolved based on the unit's most important strategic priorities and that organizational structure is adapted / scaled to meet changing needs (e.g. evolving customer demands or business priorities).

What are the right archetypes for different DT business activities?

To choose the right archetype for the business activity in scope, you might consider the following set of criteria (i.a.):

- Degree of cross-functional collaboration
- Existence of clearly defined standards and KPIs
- Types of task: repetitive or creative
- Allocation of end-to-end ownership within or outside the team

Once the appropriate archetype is chosen, the right team structures and roles and responsibilities need to be defined. *See how-to-guides "structural elements" & "roles & responsibilities"* for more information.

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3. Additional Information

Which relevant enabling formats exist at DT?

A key learning objective is to understand the different archetypes for the Flexibel Organization. These is published on YAM. (see below & [Enabling Org Design - Deep Dive Flexible Organization](#))

Where can I learn more about the topic?

The following additional information can be helpful for the understanding of Flexible Organization:

NAME	BRIEF DESCRIPTION	LINK
FLEXIBLE ORGANIZATION FROM HRM-ORG	Description of different archetypes for Flexibel Organization (first link) & Enabling Org Design – Deep Dive Flexible Organization (second link)	https://yam.telekom.de/docs/DO-C-386180 https://yam.telekom.de/groups/all-about-agile-blueprint/blog/2018/10/29/agile-compass-deep-dive-vol-1-org-design
ORGPRESS FROM HRM-ORG	Description of OrgPress incl. explanations	https://yam.telekom.de/docs/DO-C-370805
SPANS & LAYERS FROM HRM-ORG	Explanation of Spans & Layers principles for DTAG	https://yam.telekom.de/docs/DO-C-386201
POOL ORGANIZATION PK-PM (TELEKOM DEUTSCHLAND GMBH)	Information on pooling organization in PK-PM (Telekom Deutschland GmbH)	https://yam.telekom.de/groups/pk/blog/2017/10/24/flexibler-arbeiten-dank-poolorganisation https://yam.telekom.de/groups/pk/blog/2018/05/22/pool-orga-pm
VTI INNOVATION HUB	Information on Flexible Organization of VTI Innovation Hub	https://yam.telekom.de/docs/DO-C-478513
BRINGING AGILE TO IT INFRASTRUCTURE: ING NETHERLANDS	Head of ING Netherlands' IT infrastructure function explains how his team carried out an agile transformation. (e.g., through setup of cross-functional squad teams)	https://www.mckinsey.com/business-functions/digital-mckinsey/our-insights/bringing-agile-to-it-infrastructure-ing-netherlands-agile-transformation
INSIDE SPOTIFY	Information on Spotify model for agile organizations	https://www.youtube.com/watch?v=4GK1NDTWbkY

Contact

HRM-ORG: <https://yam.telekom.de/groups/organization-development>

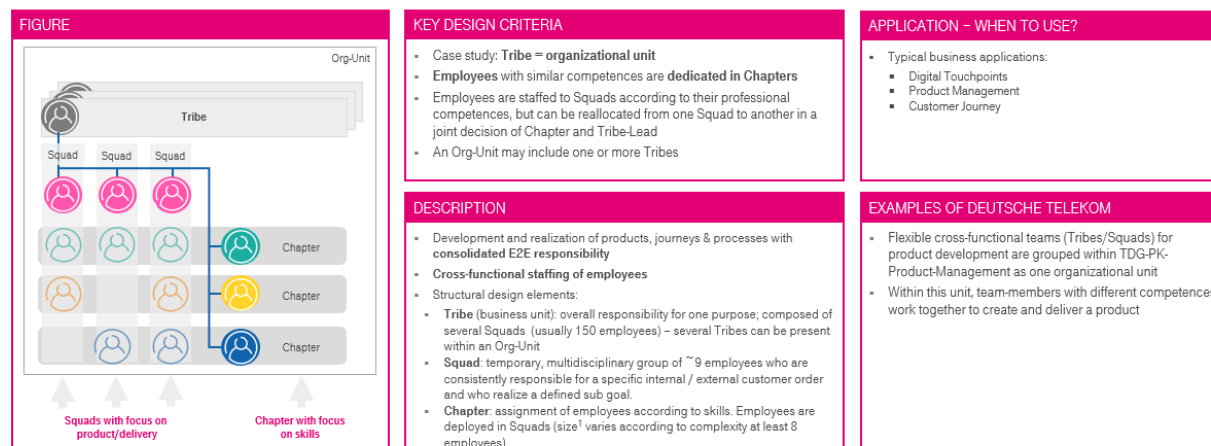
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Appendix

Detailed description of Flexible Organization (two archetypes)

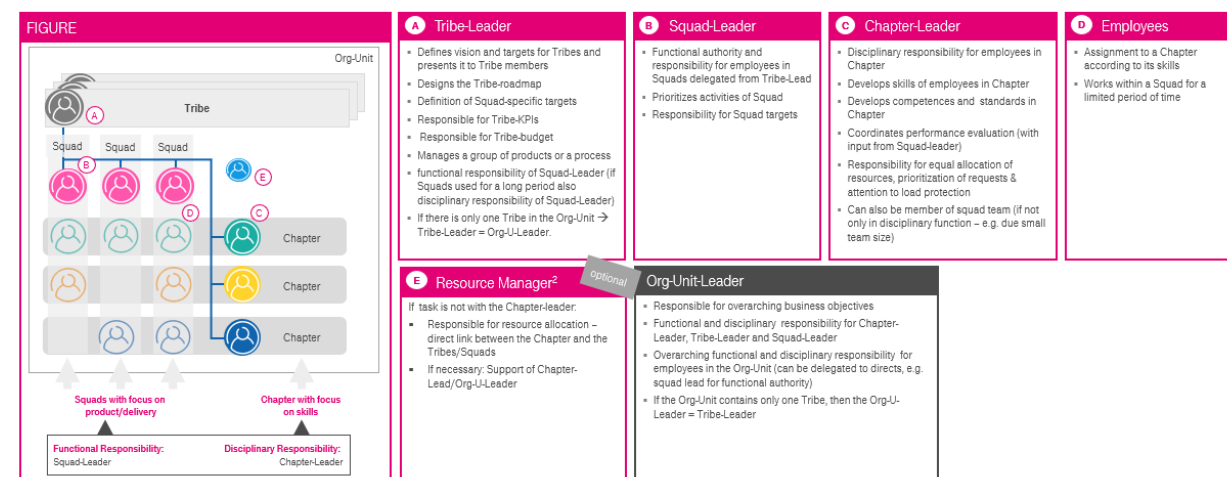
Archetype 1: Cross-functional teams

ARCHETYPE 1: CROSS-FUNCTIONAL TEAMS (1/2)



T ¹ Depending on: (a) size varies according to complexity of the subject/topic and (b) on maturity level and heterogeneity of skill-sets in a chapter (i.e. how much effort is required to build competencies)

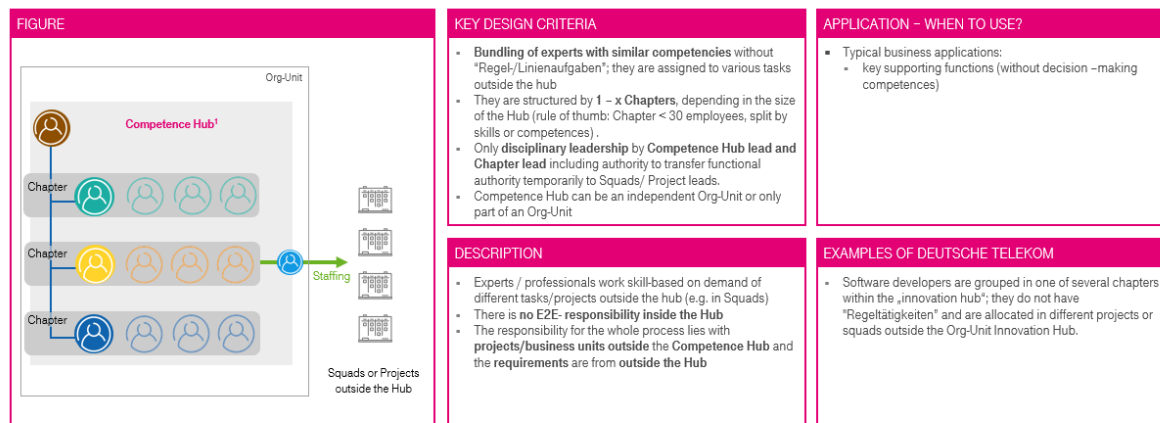
ARCHETYPE 1: CROSS-FUNCTIONAL TEAMS – ROLE DESCRIPTION (2/2)



T ² **LIFE IS FOR SHARING.**

Archetype 2: Competence Hubs

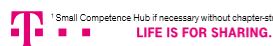
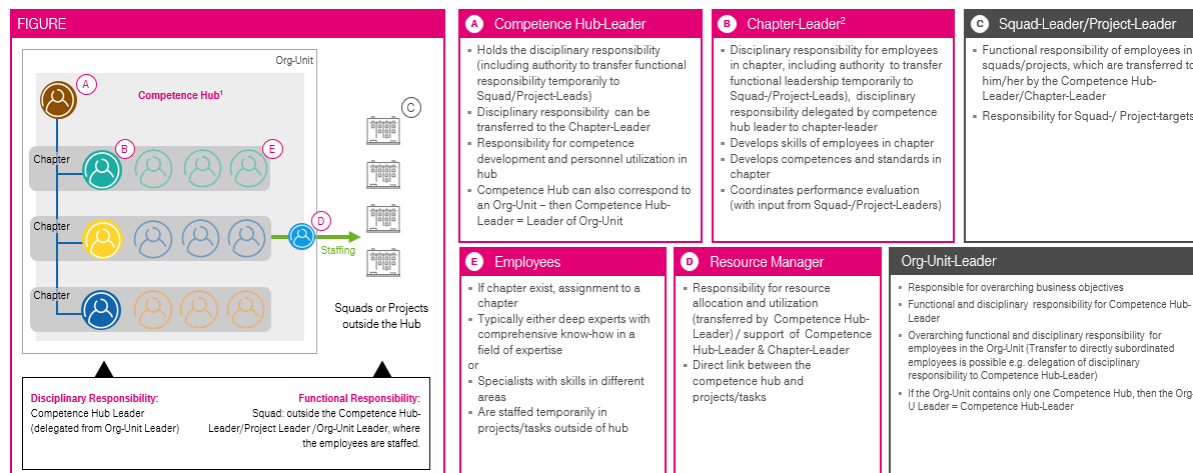
ARCHETYPE 2 – COMPETENCE HUBS (1/2)



¹ At small scale, Competence Hub could have one chapter only with Competence Hub Lead and Chapter Lead in "personal union"



ARCHETYPE 2 – COMPETENCE HUBS (2/2) ROLE DESCRIPTION



¹ Small Competence Hub if necessary without chapter-structure/ Competence-Hub can also be a Org-Unit ² Introduction of Chapter Lead depends if dedicated Chapters are needed – thus depending on size of hub

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HOW TO **DEFINE THE** **STRUCTURAL ELEMENTS** **FOR THE ARCHETYPES** **OF FLEXIBLE** **ORGANIZATION?**

In this document we first describe the aspiration for agile businesses, then we establish the DT context. Note: a situational analysis is required to assess the applicability of the elements described in this guide to a specific business area.

This how-to-guide is particularly relevant for:

Target picture \ Target group	Business/org. unit leaders	HRBP	Leaders	Employees
Applying agile ways of working	This how-to-guide solely assumes a full agile operating model as target image			
Targeting a full agile operating model	✓	✓	✓	✓

1. Introduction

Why is it important?

Although most flexible structures are based on common design principles, it is important for Deutsche Telekom to understand which structural elements are used in Flexible Organizations and how to steer the move to a more efficient and effective organizational structure that is flexible and can quickly address challenges.

What do we want to achieve?

This how-to-guide describes which structural elements are used in Flexible Organization. It builds on the guide on archetypes introduced previously (see how-to-guide "flexible organizational archetypes").

Agile aspires to achieve selected shifts in the context of organization structure.

From	To
Siloed and hierarchical structures	"Flexible structure" of cross-functional teams with a high degree of flexibility
Isolated individuals who focus only on one topic	Highly integrated team structures which clear end-to-end responsibility
The hierarchy of bosses who delegate tasks	Flat structures of empowered teams to make decisions within a frame and work in an end-product orientation

Note: The "From" dimensions serve an illustrative purpose and do not necessarily reflect the current DT reality.

2. How to get there?

How does the archetype influence the choice of the structure?

The structural elements depend on the chosen archetype for Flexible Organization. Flexible Organization can be created with two archetypes (*see how-to-guide "flexible organizational archetypes"*).

- **Cross-functional teams (Archetype 1):** To create and deliver a product, journey, process or any creative customer-facing process with E2E responsibility; this archetype can be designed by three structural elements:
 - **Tribe:** Continuous responsibility for a common goal and consists of several squads
 - **Squad:** (Temporary), interdisciplinary association of employees with consistent responsibility for one goal
 - **Chapter:** Assignment of employees according to skills. Employees are deployed in squads. Main goals are to generate value for the squads
- **Competence Hubs (Archetype 2):** Cluster of experts with similar competences without "Regel-/Linienaufgaben"; they are structured by 1 – x chapter and functionally allocated to different tasks/projects outside of the hub.

What structural elements are to be considered in cross-functional teams?

For cross-functional teams (Archetype 1) the structural elements include tribe, squad, and chapter.

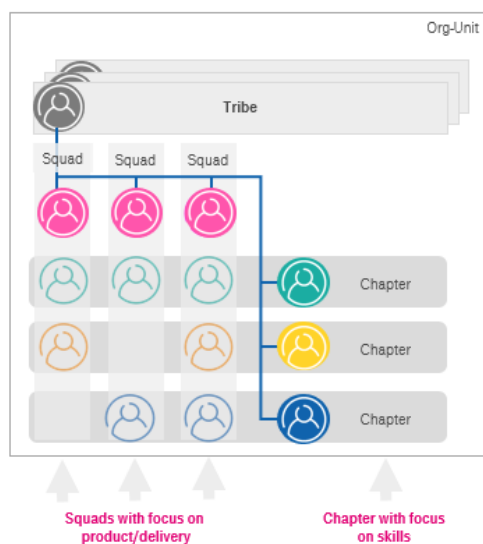


Figure 1: Cross-functional teams can be organized by tribe, squad, and chapter.

TRIBE

Objective	Overall responsibility for one purpose and processing an overarching mission (e.g. development of a “digital onboarding journey” or “optimizing the product-management process for broadband”) and to achieve this objective.
Structural setup	<ul style="list-style-type: none"> ▪ A tribe composed of several squads ▪ A tribe is pursuing a certain objective and is responsible for the outcomes of a business segment or functional area ▪ It pursues an overarching mission and constantly evolves according to business needs ▪ Several tribes can be present within an org-unit and it can correspond to an org-unit
Typical roles	Tribe lead
Size	<i>~50–150 people (size depending on business need)</i>
DT example	TDG PK-PM – pilot ongoing

SQUAD

Objective	A squad has end-to-end responsibility for executing a client project or need to realize a defined sub objective.
Structural setup	<ul style="list-style-type: none"> ▪ Temporary, multidisciplinary group of employees, that works together typically every day; is mostly but not necessarily, made up of cross-functional members such as developers and marketing specialists ▪ The employees have all the necessary skills, tools and authority to independently develop a usable product, design and launch a journey and manage a product (with squad lead in charge of product content) ▪ The composition of a squad may change as its mission evolves. When the squad executes its mission, it may be disbanded ▪ Squad members are staffed from chapter or Competence Hubs
Typical roles	Squad lead, squad team member
Size	<i>~9 employees, usually fully dedicated (size depending on business need)</i>
DT example	TDG PK-PM – pilot ongoing

Must-have: It is important to separate the "what" from the "how" in cross-functional teams. Executive committee and tribe lead decide business priorities ("what"), squad lead decides on what the priorities of the backlog are in line with business priorities set and the team decides on how to execute them. I.e. squad lead is responsible to “build the right thing” and team member responsible to “build the thing right”. The chapter lead develops the resources/competences but does not decide for his people in the squads.

CHAPTER

Objective	Builds functional expertise and maintains and continuously evolve common approaches to functional task (i.e., groups of functional competencies that will exchange and share best practices, develop standards and competence of people within chapter)
Structural setup	<ul style="list-style-type: none"> ▪ A group of experts/specialists from one competence area working across squads/projects in one area of activity (e.g., developers, marketing experts) ▪ The chapter structure organizes people according to competences ▪ For instance, all employees of a tribe or rather a squad belong to chapters ▪ The chapter lead is responsible for personnel and professional development
Typical roles	Chapter lead, chapter member
Size	<ul style="list-style-type: none"> ▪ At least 8 employees ▪ Size depends on <ul style="list-style-type: none"> - level of complexity, maturity and heterogeneity of skills in a chapter (i.e., how much effort is required to build competence) - whether or not chapter lead works as a member in squad/project team ▪ Shall take into account DT AG spans & layer rules (Flexible Organization with average span of control of 1:8 (in strategic functions) to 1:18 (in operation functions))
DT example	VTI IHUB (Innovation Hub) – implementations as of 10/2018

As a "must-have" it is crucial to free up the employees in the chapter from standard line roles and responsibilities ("Regeltätigkeiten"/"Linienaufgaben"), so that they can be dedicated 100% to contribute value to the cross-functional team. In addition, chapter lead shall participate as an expert, solving complex problems related to his/her expertise in and ad-hoc basis with other teams of the tribe / other projects (required to help build truly distinguished competences in chapter that add value to squads/projects).

Note: Tribe, squad and chapter are often grouped in a Flexible Organization with org implications at Deutsche Telekom (eg, PK-PM in Telekom Deutschland GmbH).

What structural elements are to be considered in competence hubs?

Competence Hubs are a cluster of experts with similar competences grouped in chapter without "Regel-Linienaufgabe" functionally allocated to different tasks in tasks/projects outside the hub (e.g. in squads) to meet dynamic demands. Cluster of experts staffed to tasks/projects full time based on priority of needs. E2E responsibility lies with projects / business units outside of Competence Hubs. Competence Hubs are structured by 1 – x chapter, depending on the size of the hub.

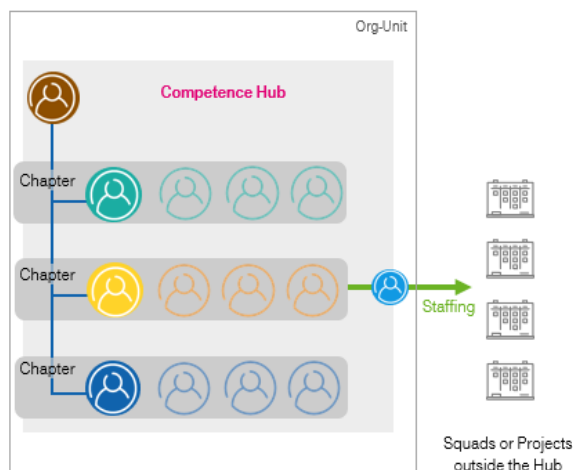


Figure 2: Competence hubs are structured by chapters

CHAPTER

Objective	Builds functional expertise and maintains and continuously evolve common approaches to functional task. (i.e., groups of functional competencies that will exchange and share best practices, develop standards and competence of people within chapter)
Structural setup	<ul style="list-style-type: none"> ▪ A group of experts/specialists from one competence area working across squads/projects in one area of activity (e.g., developers, marketing experts) ▪ The chapter structure organizes people according to competences ▪ For instance, all employees of a tribe or rather a squad belong to chapters ▪ The chapter lead is responsible for personnel and professional development
Typical roles	Chapter lead, chapter member
Size	<ul style="list-style-type: none"> ▪ At least 8 employees ▪ Size depends on <ul style="list-style-type: none"> - level of complexity, maturity and heterogeneity of skills in a chapter (i.e., how much effort is required to build competence) - whether or not chapter lead works as a member in squad/project team ▪ Shall take into account DT AG spans & layer rules (Flexible Organization with average span of control of 1:8 (in strategic functions) to 1:18 (in operation functions))

As a "must-have" it is crucial to free up the employees in the chapter from standard line roles and responsibilities ("Regeltätigkeiten"/"Linienaufgaben"), so that they can be staffed and allocated in a flexible manner 100% dedicated on projects or temporary tasks outside of the hub. In addition, the chapter lead shall anticipate as an expert, solving complex problems related to his/her expertise in and ad-hoc basis with other teams / other projects (required to help build truly distinguished competences in chapter that add value to squads/projects)

How to identify the appropriate structure?

To choose the right structure for a business activity in scope, you might consider the following criteria for the underlying archetype (*see how-to-guide "flexible organizational archetypes"*).

For cross-functional teams:

- Consider if responsibilities are end-to-end or related to one specific product
- Consider the size of your working environment/organization
- Determine the range of expertise you need within your structure (for instance, a squad)

For Competence Hubs:

- Assess the expertise of your hub and determine if you need additional capabilities
- Consider type of competences included in the hub and their complexity and maturity to derive the right structure and sizing for the underlying chapter structure

Overall it is important ("must-have") that teams are formed and/or dissolved based on the unit's most important strategic priorities and that organizational structure is adapted / scaled to meet changing needs (e.g. evolving customer demands or business priorities).

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3. Additional information

Which relevant enabling formats exist at DT?

A key learning objective is to understand the different archetypes and structural elements for the Flexibel Organization. These is published on YAM. (see below & [Enabling Org Design - Deep Dive Flexible Organization](#))

Where can you learn more about the topic?

The following additional information can be helpful for the understanding of Flexible Organization:

NAME	BRIEF DESCRIPTION	LINK
FLEXIBLE ORGANIZATION FROM HRM-ORG	Description of different archetypes for Flexibel Organization (first link) & Enabling Org Design – Deep Dive Flexible Organization (second link)	https://yam.telekom.de/docs/DOC-386180 https://yam.telekom.de/groups/all-about-agile-blueprint/blog/2018/10/29/agile-compass-deep-dive-vol-1-org-design
ORGPRESS FROM HRM-ORG	Description of OrgProcess incl. explanations	https://yam.telekom.de/docs/DOC-370805
SPANS & LAYERS FROM HRM-ORG	Explanation of Spans & Layers principles for DTAG	https://yam.telekom.de/docs/DOC-386201
POOL ORGANIZATION PK-PM (TELEKOM DEUTSCHLAND GMBH)	Information on pooling organization in PK-PM (Telekom Deutschland GmbH)	https://yam.telekom.de/groups/pk/blog/2017/10/24/flexibler-arbeiten-dank-poolorganisation https://yam.telekom.de/groups/pk/blog/2018/05/22/pool-orga-pm
VTI INNOVATION HUB	Information on Flexible Organization of VTI Innovation Hub	https://yam.telekom.de/docs/DOC-478513
BRINGING AGILE TO IT INFRASTRUCTURE: ING NETHERLANDS	Head of ING Netherlands' IT infrastructure function explains how his team carried out an agile transformation. (e.g., through setup of cross-functional squad teams)	https://www.mckinsey.com/business-functions/digital-mckinsey/our-insights/bringing-agile-to-it-infrastructure-ing-netherlands-agile-transformation
INSIDE SPOTIFY	Information on Spotify model for agile organizations	https://www.youtube.com/watch?v=4GK1NDTWbkY

Contact

HRM-ORG: <https://yam.telekom.de/groups/organization-development>

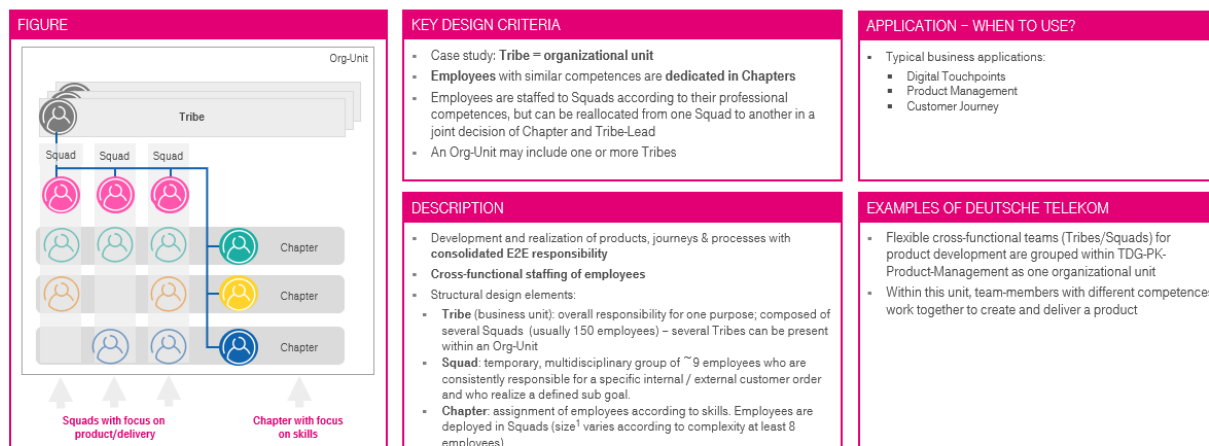
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Appendix

Detailed description of Flexible Organization (two archetypes)

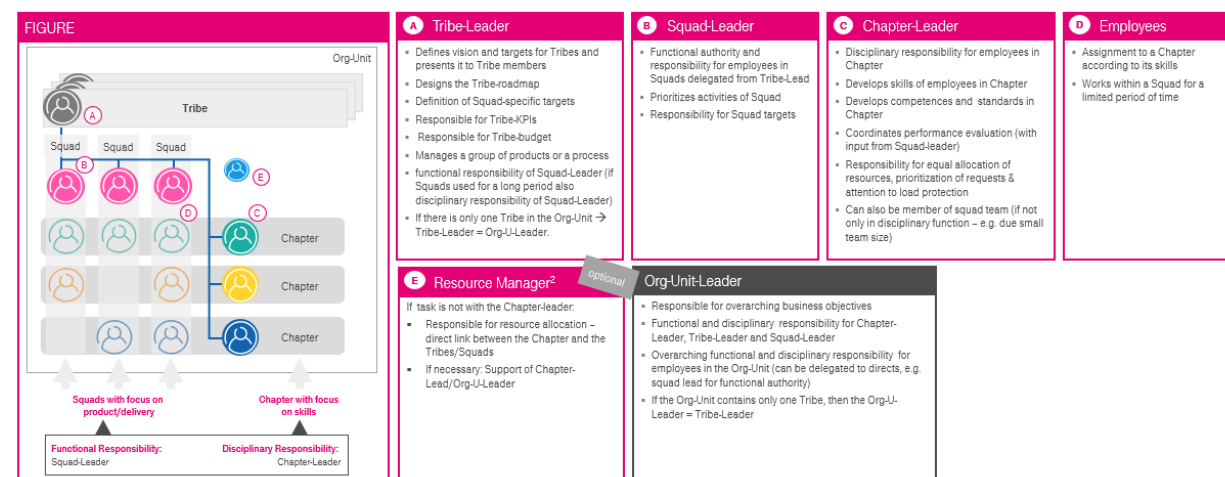
Archetype 1: Cross-functional teams

ARCHETYPE 1: CROSS-FUNCTIONAL TEAMS (1/2)



T ¹ Depending on: (a) size varies according to complexity of the subject/topic and (b) on maturity level and heterogeneity of skill-sets in a chapter (i.e. how much effort is required to build competencies)

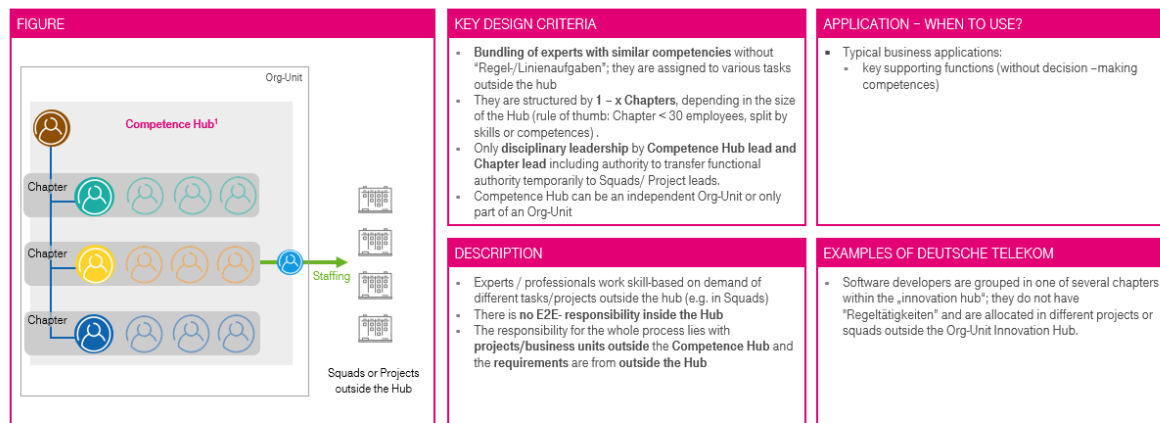
ARCHETYPE 1: CROSS-FUNCTIONAL TEAMS – ROLE DESCRIPTION (2/2)



T ² **LIFE IS FOR SHARING.**

Archetype 2: Competence Hubs

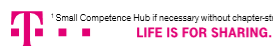
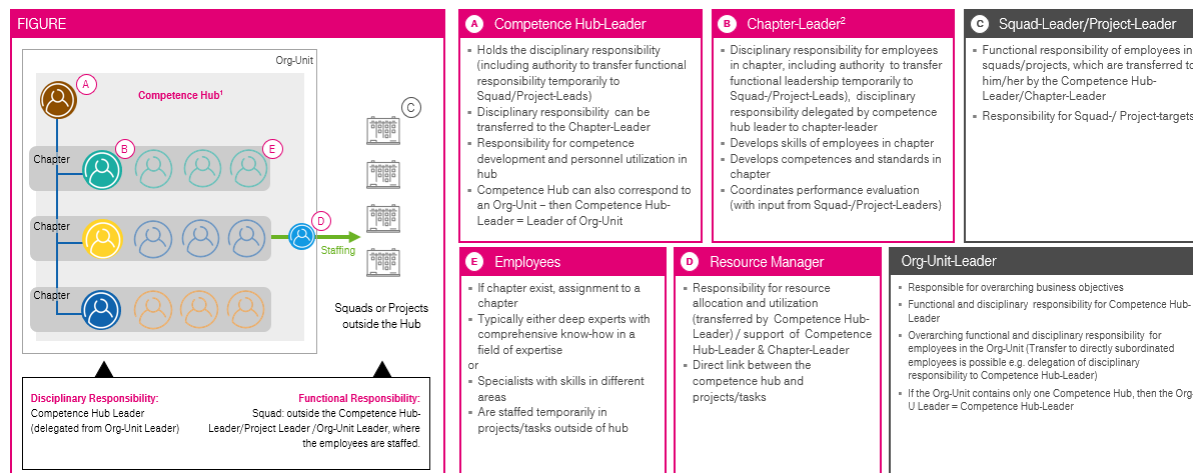
ARCHETYPE 2 – COMPETENCE HUBS (1/2)



¹ At small scale, Competence Hub could have one chapter only with Competence Hub Lead and Chapter Lead in "personal union"



ARCHETYPE 2 – COMPETENCE HUBS (2/2) ROLE DESCRIPTION



¹ Small Competence Hub if necessary without chapter-structure/ Competence-Hub can also be a Org-Unit ² Introduction of Chapter Lead depends if dedicated Chapters are needed – thus depending on size of hub

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Next HTG for agile ways of working

Next HTG for agile operating model

ORG. DESIGN



HOW TO DEFINE ROLES & RESPONSIBILITIES IN FLEXIBLE ORGANIZATION?

In this document we first describe the aspiration for agile businesses, then we establish the DT context. Note: a situational analysis is required to assess the applicability of the elements described in this guide to a specific business area.

This how-to-guide is particularly relevant for:

Target picture \ Target group	Business/org. unit leaders	HRBP	Leaders	Employees
Applying agile ways of working	This how-to-guide solely assumes a full agile operating model as target image			
Targeting a full agile operating model	✓	✓	✓	✓

1. Introduction

Why is it important?

One key element will be the ability to react and adapt to constantly changing customer needs and internal/external requirement changes in a timely manner. Therefore, more flexible forms of organization will become increasingly prominent across industries, as they help to create cross-functional teams with high degrees of flexibility. However, this necessary shift towards flexible organizational models also entails a change of traditional roles and responsibilities.

What do we want to achieve?

This guide's objective is to describe the roles and responsibilities within Flexible Organization in general and to provide practical steps to define roles and responsibilities for specific business areas, helping the reader to develop a basic understanding of roles and responsibilities. It builds on the guides archetypes and structure (*see how-to-guide "structural elements" & "flexible organizational archetypes"*).

Moving to roles that support flexible organizational structures requires the following shifts:

From	To
Disciplinary and functional management from one person	Separation of disciplinary and functional management
Detailed instruction per role with emphasis on functional separation/specialization (e.g., silos)	Detailed definition per role but with emphasis on purpose in project with cross-functional collaboration

Note: The "From" dimensions are for illustrative purposes only and do not necessarily reflect the current DT reality.

2. How to get there?

What roles do we have in Flexible Organization (archetypes)?

At the highest level, there are generic organizational responsibilities. The assignment of these responsibilities to individual roles (and the naming of these) depends on the flexible organizational archetype that is chosen. For further details *see how-to-guide "flexible organizational archetypes"*.

The typical roles in Flexible Organization are shown in the overview:

		FLEXIBLE ORGANIZATION	
		Cross-functional teams (Archetyp 1)	Competence Hubs (Archetype 2)
TYPICAL RESPONSIBILITIES (HIGH-LEVEL)	Setting overall business vision and strategic aspiration	Org unit lead	
	Setting operational priorities/functional responsibilities	Squad lead	Project manager/Squad lead where employee is staffed
	Allocating resources	Org unit lead: to allocate to tribes/squads Tribe lead, chapter lead, squad lead: to allocate to squads ¹	Resource manager
	Coordinating between different teams/units	Tribe lead: to achieve business objective Chapter lead: coordination	Competence Hub lead/Resource manager
	Competence development	In Flexible Organization: Chapter lead In Project Organization: Line manager	In Flexible Organization: Competence Hub lead/Chapter lead In Project Organization: Line manager
	Disciplinary responsibilities	In Flexible Organization: Chapter lead In Project Organization: Line manager	In Flexible Organization: Competence Hub lead (potentially delegated to chapter lead) In Project Organization: Line manager

¹ Potential support from dedicated resource manager if needed

What are the tasks and responsibilities of the roles in Flexible Organization?

The following provides a summary of the typical responsibilities of the individual roles.

Cross-functional teams (with org. implications)

Tribe Lead:

- Defines vision and targets for tribes and presents it to tribe members
- Designs the tribe-roadmap
- Definition of squad-specific targets
- Responsible for tribe-KPIs
- Responsible for tribe-budget
- Manages a group of products or a process
- Functional responsibility of squad leader (if squads used for a long period also disciplinary responsibility of squad leader)
- If there is only one tribe in the org unit || tribe leader = org unit leader

Squad Lead:

- Functional authority and responsibility for employees in squads delegated from tribe lead
- Prioritizes activities of squad
- Responsibility for squad targets

Chapter Lead:

- Disciplinary responsibility for employees in chapter
- Develops skills of employees in chapter
- Develops competences and standards in chapter
- Coordinates performance evaluation (with input from squad leader)
- Responsibility for equal allocation of resources, prioritization of requests & attention to load protection
- Can also be member of squad team (if not only in disciplinary function – e.g. due small team size)

Org Unit Lead:

- Responsible for overarching business objectives
- Functional and disciplinary responsibility for chapter leader, tribe leader and squad leader
- Overarching functional and disciplinary responsibility for employees in the org unit (can be delegated to directs, e.g. squad lead for functional authority)
- If the org unit contains only one tribe, then the org unit lead = tribe lead

Resource Manager (optional):

- If task is not with the chapter leader:
 - Responsible for resource allocation – direct link between the chapter and the tribes/squads
 - If necessary: Support of chapter lead/org unit lead

Employee:

- Assignment to a chapter according to its skills
- Works within a squad for a limited period

Competence Hub (with org. implications)

Competence Hub Leader:

- Holds the disciplinary responsibility (including authority to transfer functional responsibility temporarily to squad-/project-leads)
- Disciplinary responsibility can be transferred to the chapter leader
- Responsibility for competence development and personnel utilization in hub
- Competence Hub can also correspond to an org unit – then Competence Hub lead = Org unit lead

Chapter Lead:

- Disciplinary responsibility for employees in chapter, including authority to transfer functional leadership temporarily to squad-/project-leads, disciplinary responsibility delegated by Competence Hub lead to chapter leader
- Develops skills of employees in chapter
- Develops competences and standards in chapter
- Coordinates performance evaluation (with input from squad-/project-leaders)

Org Unit Lead:

- Responsible for overarching business objectives
- Functional and disciplinary responsibility for Competence Hub leader
- Overarching functional and disciplinary responsibility for employees in the org unit (transfer to directly subordinated employees is possible e.g. delegation of disciplinary responsibility to Competence Hub leader)
- If the org-unit contains only one Competence Hub, then the Org Unit lead = Competence Hub lead

Resource Manager:

- Responsibility for resource allocation and utilization (transferred by Competence Hub lead) / support of Competence Hub leader & chapter leader
- Direct link between the Competence Hub and projects/tasks

Employee:

- Typically, either deep experts with comprehensive know-how in a field of expertise or
- Specialists with skills in different areas
- Are staffed temporarily in projects/tasks outside of hub

Leader of project (outside Competence Hub):

- Functional responsibility of employees in squads/projects, which are transferred to him/her by the Competence Hub lead/chapter leader
- Responsibility for squad-/project-targets

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3. Additional Information

What relevant enabling formats do we have in DT?

A key learning objective is to understand the different archetypes, structural elements as well as roles and responsibilities for Flexible Organization. These is published on YAM. (see below & [Enabling Org Design - Deep Dive Flexible Organization](#))

Where can you learn more about the topic?

The following additional information can be helpful for the understanding of Flexible Organization:

NAME	BRIEF DESCRIPTION	LINK
FLEXIBLE ORGANIZATION FROM HRM-ORG	Description of different archetypes for Flexibel Organization (first link) & Enabling Org Design – Deep Dive Flexible Organization (second link)	https://yam.telekom.de/docs/DO-C-386180 https://yam.telekom.de/groups/all-about-agile-blueprint/blog/2018/10/29/agile-compass-deep-dive-vol-1-org-design
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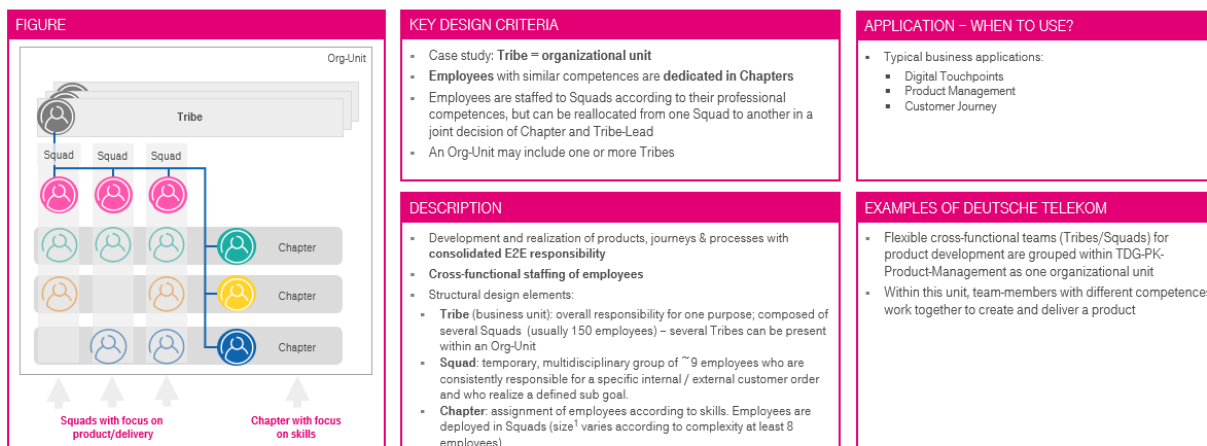
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Appendix

Detailed description of Flexible Organization (two archetypes)

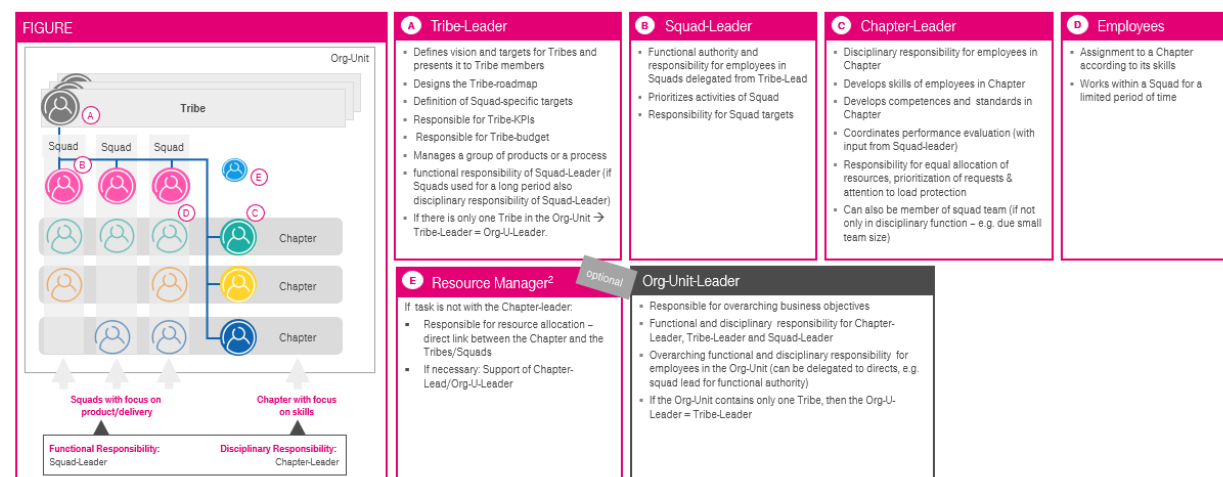
Archetype 1: Cross-functional teams

ARCHETYPE 1: CROSS-FUNCTIONAL TEAMS (1/2)



T ¹ Depending on: (a) size varies according to complexity of the subject/topic and (b) on maturity level and heterogeneity of skill-sets in a chapter (i.e. how much effort is required to build competencies)

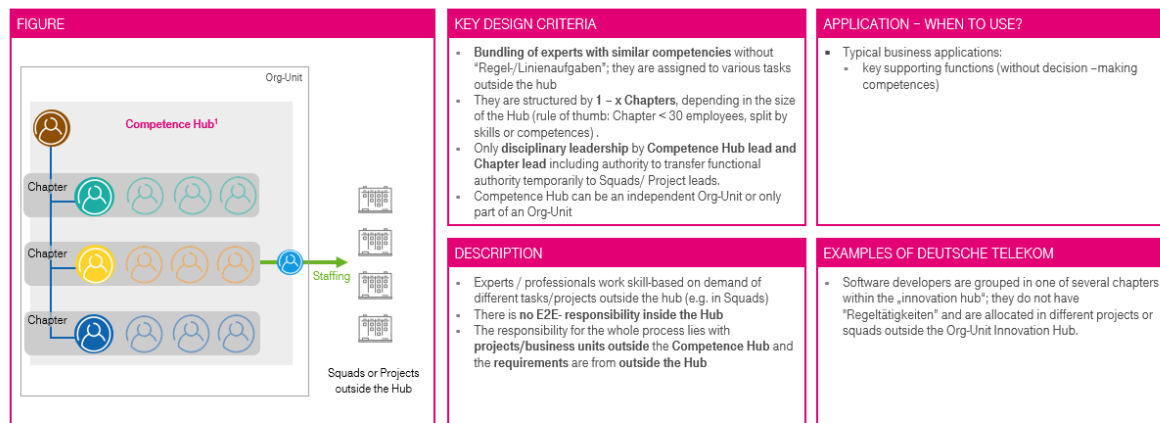
ARCHETYPE 1: CROSS-FUNCTIONAL TEAMS – ROLE DESCRIPTION (2/2)



T ² **LIFE IS FOR SHARING.**

Archetype 2: Competence Hubs

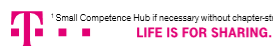
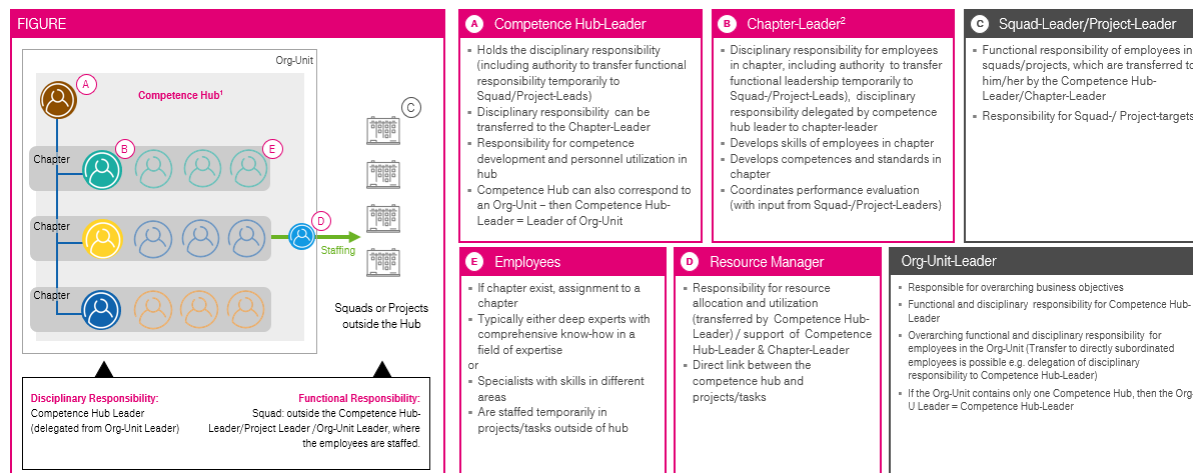
ARCHETYPE 2 – COMPETENCE HUBS (1/2)



¹ At small scale, Competence Hub could have one chapter only with Competence Hub Lead and Chapter Lead in "personal union"



ARCHETYPE 2 – COMPETENCE HUBS (2/2) ROLE DESCRIPTION



¹ Small Competence Hub if necessary without chapter-structure/ Competence-Hub can also be a Org-Unit ² Introduction of Chapter Lead depends if dedicated Chapters are needed – thus depending on size of hub

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B	Leadership and Mindset
---	------------------------

6	Leadership mindset and empowering teams	Link
The following questions can be answered by reading this HTG:		Click
Agile aspiration – which design criteria are crucial to consider?		
<ol style="list-style-type: none"> 1. What are the major shifts? 2. How to lead with agility? 		
DT-relevance – which implications does this have on DT?		Click
<ol style="list-style-type: none"> 3. What is expected from agile leaders and how to interpret the three DT leadership principles in agile context? 4. How to encourage agile leadership at DT? 5. What are established community formats at DT? (<i>Appendix</i>) 		
Additional information: Where can I learn more about the topic and whom to contact?		Click

7	Sharing Mindset	Link
The following questions can be answered by reading this HTG:		Click
Agile aspiration – which design criteria are crucial to consider?		
<ol style="list-style-type: none"> 1. What are the major shifts? 2. How to build an internal exchange culture? 3. Why is it necessary to establish a sharing culture throughout the organization? 4. What community types will be distinguished? 5. How to build a community? 		
DT-relevance – which implications does this have on DT?		Click
<ol style="list-style-type: none"> 6. Which knowledge portal should be approached for agile? 7. What are established community formats at DT? (<i>Appendix</i>) 		
Best-practice – from whom can DT learn?		Click
<ol style="list-style-type: none"> 8. ING: On-boarding process (<i>Appendix</i>) 		
Additional information: Where can I learn more about the topic and whom to contact?		Click

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HOW TO DEVELOP AN AGILE LEADERSHIP MINDSET AND EMPOWERMENT?

In this document we first describe the aspiration for agile businesses, then we establish the DT context. Note: a situational analysis is required to assess the applicability of the elements described in this guide to a specific business area.

This how-to-guide is particularly relevant for:

Target picture \ Target group	Business/org. unit leaders	HRBP	Leaders	Employees
Applying agile ways of working	This how-to-guide solely assumes a full agile operating model as target image			
Targeting a full agile operating model	✓	✓	✓	✓

1. Introduction

Why is it important?

Leadership is experiencing a massive transition as it moves towards a new fundamental agile leadership mindset, which is guiding the organization to change from a traditional “command and control” approach towards a more “shared/servant” leadership style that focuses on shifting from maximizing financial shareholder value through a profitable plan to maximizing total stakeholder value through a high-performing system. Leaders are required to role-model appropriate ways of behaving, guiding and managing in an agile world and consequently contribute to a successful agile transformation. Leadership is the most critical success factor in establishing an agile culture, as more than 50-percent of agile transformations fail due to a lack of role-modeling or due to resistance from team members. Following the principles and key steps outlined in this how-to-guide should be considered a foundational “must-have”¹.

Deutsche Telekom (DT) has established leadership principles, which are the basis for how DT will lead in the digital age. In an agile context, these principles can build a solid leadership mindset foundation at DT: however, these might need to be re-interpreted to some extent. Individual agile leaders must find a way to incorporate these principles into their way of leading and managing according to their particular situation and environment. Establishing a common denominator helps align and measure the behavior of individuals, teams and the entire organization. These three principles are meant to be established on a group-wide basis.

¹ Elementary pillar of an agile operating model

1) #collaborate

The principle #collaborate means winning and losing together, fostering solution-driven dialogues, accepting and giving feedback, as well as committing to taking responsibility when needed.

2) #innovate

The principle #innovate places a high emphasis on constant innovation, permanently challenging the status quo, an openness to failure, and showing courage for ideas as well as fighting for these. These behaviors are based on an understanding of the DT business model.

3) #empower to perform

#empowering teams to perform focuses on strengthening teams, giving responsibilities to the team and encouraging risk taking. In addition, it means creating a supporting, developing as well as caring environment. This is embedded into a clear vision to make the strategy relevant to DT's people.

Incorporating these leadership principles will be crucial to facilitate a mindset and behavior change of leaders.

What do we want to achieve?

This how-to-guide describes how leadership mindset and behavior need to shift and what measures need to be taken to facilitate this shift.

Agile aspires to achieve selected mindset and behavior shifts in the context of leadership.

From	To
Navigating by looking inward and backward; defining detailed plans through extrapolating past performance	Navigating by looking outward and forward; designing an open system that empowers people at all levels to respond in real time to a changing environment
Communicating the plans and ensuring everyone is clear on what to do	Facilitating the emergence of a clear, shared, and inspiring purpose ("WHY")
Constantly checking up and ensuring ("instruct") everyone does what they were assigned to do	Helping everyone build the skills and mindsets they need to succeed in an open system; engaging and aligning hearts and minds to unleash the full potential ("inspire")
A culture of fear and justification where failure is not an option	A culture of experimentation and feedback that allows fast failures to enable quick lessons and improvement
Secrets and information accessibility based on role and position	A comfort with radical transparency and sharing of information with everyone
Top-down steering and a culture of command and control by telling teams what to do and how to execute	Empowering and coaching team members through coaching and a caring attitude by only setting a direction ("WHAT") and letting teams decide how to achieve the defined objective/outcome ("HOW")

Note: The "From" dimensions serve as an illustrative purpose and do not necessarily reflect the current DT reality.



2. How to get there?

How to lead with agility?

Amid the complexity of today's environment, leaders of agile organizations need to be able to fulfill three key tasks:

1. Lead with inner agility by developing agile mindsets and behaviors
 - Pausing while remaining engaged in action is a counterintuitive step that leaders can use to create space for clear judgment, original thinking, and fast, purposeful action.
 - Good new ideas can come from anywhere and a single technology product can reshape your business. In such a world, listening—and thinking—from a place of not knowing is a critical means of encouraging the discovery of original, unexpected, breakthrough ideas.
 - One way to discern the complex patterns that give rise to both problems and windows of emergent possibilities is to change the nature of the questions we ask ourselves. Asking yourself challenging questions may help unblock your existing mental model.
 - In our complex systems and in this complex era, solutions are rarely straightforward. Instead of telling your team to move from point A to point B, join them in a journey moving in a general direction. Lead yourself, and your team, with purposeful vision and not just objectives (that is, move away from extreme delegation to letting go of inputs (the how) and focusing on customer and business only).
 - Quick, cheap failures can avert major, costly disasters. This fundamental Silicon Valley tenet is as true for you as it is for your company. Thinking of yourself as a living laboratory helps make the task of leading an agile, ever-shifting company exciting instead of terrifying.
2. Lead teams to apply agile ways of working to enhance speed, efficiency, ingenuity, and impact
 - Apply agile development practices (such as Scrum²) to accelerate and improve results through autonomy, interaction, focus, and speed.
 - Use design thinking to identify unmet needs, ideate, experiment, and create new possibilities.
 - Develop innovative business models that deliver breakthrough value to all stakeholders.
 - Raise the bar for teams on the “art of what’s possible,” founded on a solid understanding of the latest technologies and tools.
 - Inspire and ignite creative collision in problem solving, especially around new frontiers in data and analytics.
3. Lead the organization to create value amidst complexity and uncertainty
 - Apply agile organizational design principles and practices to architect a continually evolving (stable yet dynamic) organization that collaborates across silos and makes quality decisions at speed.
 - Shape an agile organizational culture through role modeling, communicating, and building capabilities that engage, align, and assign people throughout the organization.
 - Adapt the business to digital disruption by attracting digital talent, investing in digital technologies, setting a digital strategy, and embedding advanced analytics into the organization.

² In the stage of agile product development and implementation, teams can, along with other less common methods, rely on Scrum to align on delivering a single product and requirements for the agreed duration of the sprint

What is expected from agile leaders and how to interpret the three DT leadership principles in an agile context?

The following table exhibits how a tribe lead, a squad lead, or a chapter lead might employ the DT leadership principles. Expectations will differ depending on the role to be played within the organization. The table is not exhaustive and applies to the archetype of cross-functional teams (*see how-to-guide "flexible organizational archetypes"*) on an exemplary basis. The leadership principles however also apply to other agile archetypes.

DT LEADERSHIP PRINCIPLES			
#collaborate		#innovate	#empower to perform
WHAT AGILE COULD MEAN FOR DIFFERENT LEADERSHIP ROLES (EXAMPLES FOR THREE LEADERSHIP ROLES)			
TRIBE LEAD	Tribe lead as collaborator <ul style="list-style-type: none"> Manages expectations of external stakeholders Creates an atmosphere of confidence and trust in the tribe and motivates the tribe to complete its tasks 	Tribe lead as innovator <ul style="list-style-type: none"> Defines vision and goals for tribe and presents them to tribe members Designs and maintains the overall roadmap ("big picture" / "long-term strategy") Supports squads in defining specific goals and synchronizes goals across different squads Puts the customer and their needs center stage 	Tribe lead as enabler <ul style="list-style-type: none"> Plans quarterly business and budget for the tribe and prepares a Quarterly Business Review (QBR) Extends economic limits for business initiatives outside the normal scope when project potential warrants it Is part of an Executive Action Team (EAT) responsible for removing waste and obstacles to the agile transformation Makes proposals on the tribe composition Is a role model for living an agile mindset (also for other leaders) by showcasing opportunities from enabling others to tribe members



CHAPTER LEAD	<p>Chapter lead as collaborator</p> <ul style="list-style-type: none">▪ Supports setup of communities of practice▪ Fosters interaction and knowledge transfer processes	<p>Chapter lead as innovation</p> <ul style="list-style-type: none">▪ Defines a clear vision for which competencies and skills are needed in the future▪ Establishes professional standards and work methodology in the chapter	<p>Chapter lead as enabler</p> <ul style="list-style-type: none">▪ Recruits and carries out onboarding of the right talent▪ Is a role model for living an agile mindset▪ Supports chapter members in extending their competencies and skills▪ Coaches chapter members on their professional development
SQUAD LEAD	<p>Squad lead as collaborator</p> <ul style="list-style-type: none">▪ Supports/facilitates all squad ceremonies▪ Acts with an outward-looking mindset towards other departments, involving them often and early <p>Ensures effective collaboration between team members</p>	<p>Squad lead as innovator</p> <ul style="list-style-type: none">▪ Participates in planning the Tribe's Supersprint³ to reaffirm priorities and clarify needs▪ Conducts product development with end-to-end responsibility▪ Provides guidance through a customer-oriented product or service vision (co-created with the team)▪ Keeps an eye on the profitability of the business and sensitizes everyone in the team to this by establishing and using meaningful KPIs▪ Minimizes the risk of developing past the market (ensuring demand) and from reducing go-to-market time▪ Is aware of the constantly changing market environment <p>Asserts the product vision in the face of other influences</p>	<p>Squad lead as enabler</p> <ul style="list-style-type: none">▪ Interacts with other squads and tribes as part of squad synchronization ceremonies to implement cross-squad tasks▪ Maintains the squad backlog▪ Is a role model for living an agile mindset?▪ Defines necessary competences in the squad together with the tribe/chapter lead▪ Gives feedback to all squad members at the end of each sprint <p>Inspires and supports the team in learning and applying a user-centric approach</p>

³ Super-Sprint is a sprint with a longer duration

How to encourage agile leadership at DT?

Agile leadership can be implemented by respecting five foundational steps that point out the relevance of including not only leaders into the process of establishing agile leadership:

1. **Educate all leaders in agile leadership**

Establish a deep understanding of agile leadership by educating all leaders in it (e.g., leadership principles, application examples). One key criterion is maximum buy-in and goal alignment on the transformation from the entire leadership of the organization, who thereby exhibit role model behavior. Leveraging existing enablers (leadership trainings) or developing and establishing novel experiential learning journeys will not only allow leaders to gain agile knowledge but also enable them to apply these new insights directly on the job. Further opportunities for peer exchange to discuss learnings, questions, and experiences can help to manifest the progress made in a sustainable manner. In addition, one-to-one coaching helps establish agile leadership over the longer term and eliminate undesired behaviors (see “From – to” section above).

2. **Facilitate a mindset shift for leaders in the organization**

Develop a clear image of the target picture and facilitate a mindset and behavior shift enabling leaders to adopt new leadership behaviors in agile contexts. It is not only the leaders who need to become aware of a new set of required behaviors, responsibilities, and tasks: the entire organization should exhibit a mutual understanding of what an agile leader should look like—that is, the leadership mindset and behavior(s) a leader needs to adopt in an agile environment.

3. **Generate a shared vision and align goals for agile leadership**

Agile leadership cannot be implemented via a top-down approach. Instead, a shared creation mode integrating leaders from all levels into the design and roll-out is required. Workshops serve to align goals and vision on a leadership level and aid in shifting leader behaviors and mindsets.

4. **Identify and eliminate barriers**

Leverage workshops to identify barriers that prevent comprehensive implementation of agile leadership. Ensure a mandate and commitment from senior leaders to effectively eliminate these barriers. Try to establish a mutual understanding of what is required to eliminate these barriers, and transparently communicate goals and next steps to avoid potential barriers upfront. Frequent “townhalls” and other informative events should be used to accelerate an organization-wide adaptation of agile leadership and to ensure a sustainable establishment of agile leadership at all leadership levels.

5. **Develop the agile leadership approach on both employee and team level**

Successful implementation of agile leadership strongly depends on the buy-in and active participation of employees. This can only be achieved through thorough and transparent communication, as well as discussion between agile leaders and their respective team members to gain a common understanding and adjust the concept collaboratively. Frequent check-ins and workshops for all affected employees provide the key to success. Making use of already existing formats such as Working Out Loud, KitchenTalk, Barcamp, or Nite of Truth (see Appendix) will be helpful to communicate with all relevant stakeholders and to come to a mutual understanding on agile leadership.

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3. Additional information

What relevant enabling formats do we have at DT?

A key learning objective is to provide an introduction and step-by-step guidance for the set up and implementation of agile teams working autonomously in a self-led way. These will soon be published on YAM.

Where can I learn more about the topic?

The following additional sources of information are helpful for understanding agile leadership mindsets and behaviors.

NAME	BRIEF DESCRIPTION	LINK
LEADING WITH INNER AGILITY	McKinsey article on transformational leaders in an agile environment and the art of letting go.	https://www.mckinsey.com/business-functions/organization/our-insights/leading-with-inner-agility
LEAD2WIN	Leading Principles and tools for the creation of a feedback culture.	Lead2Win Feedback Cards https://yam.telekom.de/groups/lead2win/projects/feedback-cards/overview Lead to Win https://yam.telekom.de/groups/lead2win
TSI LEADERSHIP INITIATIVE	Case example on how leaders at TSI need to be educated.	https://yam.telekom.de/docs/DOC-476198 https://yam.telekom.de/groups/getinvolved/blog/2018/04/25/introduction-of-our-tsi-leadership-initiative-and-the-change-transformation-leadership-team https://yam.telekom.de/groups/lighthouse-einfach-machen/blog/2017/12/21/neues-training-agile-leadership-mit-management-30-zur-effektiven-mitarbeiter-und-unternehmensf%C3%BChrung-in-der-vuca-welt

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Appendix

Community formats at DT

KitchenTalk	A presentation format that allows a speaker to talk about a topic in an openly accessible area (e.g., Future Work Kitchen) and stimulate a discussion. KitchenTalk takes place at lunchtime; snacks and drinks are available.
Nite of Truth	An opportunity for three to five speakers to discuss failed projects and present key lessons learned. The format is embedded in a global movement that focuses on start-ups discussing their failure. Every speaker can talk for 7 minutes and is allowed to employ up to ten pictures to make his/her point.
Working Out Loud (WOL)	A method developed by John Stepper that was originally a self-learning program for individuals. The format is based on the idea that four or five people jointly go on a 12-week learning journey to reach a self-chosen learning goal. Participants can use social media, the Internet, or company-internal digital platforms to reach this goal.

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Next HTG for agile ways of working

Next HTG for agile operating model

LEADERSHIP



HOW TO DEVELOP A SHARING MINDSET?

In this document we first describe the aspiration for agile businesses, then we establish the DT context. Note: a situational analysis is required to assess the applicability of the elements described in this guide to a specific business area.

This how-to-guide is particularly relevant for:

Target picture \ Target group	Business/org. unit leaders	HRBP	Leaders	Employees
Applying agile ways of working			✓	✓
Targeting a full agile operating model	✓	✓	✓	✓

1. Introduction

Why is it important?

To counteract the limitations of divided and inflexible organizational structures and a culture that does not allow experimentation or failure and tolerates rigid processes and a constraining work environment, it is not only important to change the mindset of leaders (*see how-to-guide "leadership mindset and empowerment"*), but it is the responsibility of each employee to change their mindset. This includes, among other things, the development of a sharing mindset. The aim is to create an organization in which a high level of information transparency, continual learning, and exchange of interests is a matter of course. This can be ensured if internal exchange (within the organization) as well as external exchange (across organizations) is fostered.

What do we want to achieve?

Agile aspires to achieve selected shifts in the context of developing a sharing mindset.

From	To
Organizations as “machines” with hard-coded instructions and a rigid blueprint; people fill their assigned roles as “cogs” in the system	Organizations as organic systems in which people collaborate quickly and effectively on tasks and projects across departments
Selective sharing of information in organization to protect commercial secrets	People can easily share ideas from and results of their work and find others in the organization with relevant knowledge or similar interests
Centrally prepared reports with pre-cut analysis	People in the unit have access to unfiltered data on products, customers, and financial information
Ensuring full ownership of products and solutions to maintain control	Units maintain flexible models of partnering with external parties

Note: The “From” dimensions are for illustrative purposes only and do not necessarily reflect the current DT reality.

2. How to get there

Which dimensions will be addressed?

To ensure information transparency and continuous learning in the organization, there are two dimensions to address:

- **Internal exchange** (the focus of this how-to-guide)
- **External exchange**

This how-to-guide focuses specifically on how to foster internal exchange. In contrast, the agile methods and frameworks can be used to build a strong outward mindset (*see how-to-guide “agile methods and frameworks”*).

How to build an internal exchange culture?

To build an organization that promotes information transparency and exchange throughout the organization, there are three levers to address with concrete action items, each describing an essential or additional pillar within an agile operating model (see table below).

Due to the relevance of informal interest groups – particularly communities of knowledge and communities of interest (guilds) – they are described in more detail in the next section of this how-to-guide.



Levers	Action items		Importance for agile ¹
Informal interest groups	Within agile team	Operational meetings (<i>see how-to-guide “agile meetings”</i>)	Must have
		Weekly tribe lunch	Nice to have
		Self-organized events for specific interests	Nice to have
	Wider organization	Exchange events to spread agile mindset (e.g., “housewarming party” at agile work space to gather people’s interest in agile way of working or monthly “knowledge bar” with sponsored guest speaker and drinks)	Nice to have
		Communities of knowledge ²	Must have
		Communities of interest (guilds) ²	Nice to have
Transparency of and access to information throughout the organization	Publish key information (e.g., team goals/objectives and key results (OKRs), mission statements, product performance) to increase transparency		Must have
	Utilize knowledge portals to publish information to exchange knowledge ²		Must have
To enable creation of social capital beyond functional expertise and teams	Orchestrate ways for employees from different functions to get to know one another and build a network (e.g., company pays for lunch to meet with a random colleague)		Must have
	Create work spaces that lead to informal networks		Must have

¹ Must have: essential pillar of agile operating model; nice to have: additional enabler of agile operating model

² Further detailed in the section below

Why is it necessary to establish a sharing culture throughout the organization?

As described, strengthening informal exchanges is a way to foster an internal culture of exchange. Building communities of interest and/or knowledge is one way of fostering exchange in the wider organization. The purpose of an agile community can take one or more of the three dimensions:

1. **Education.** Educational capacity for agile practitioners and change agents. However, there is no need to reinvent the wheel at the team level; regularly sharing what has proven successful or a failure in the context of the transition will significantly ease the burden of learning.
2. **Inspiration.** The agile community of practice contributes to selling agile to the rest of the organization by informing and educating its members. The members of the agile community also serve as the first servant leaders and thus as role models for what becoming agile will mean in practice. They bring authenticity to the endeavor.
3. **Cohesion.** Strengthen cohesion in the organization to build trust and increase transparency.

What community types will be distinguished?

In general, two types of community formats will be distinguished:

a) Communities of knowledge

Description	A community that groups together members from different disciplines who share a common formal knowledge and are recognized for this, i.e., connect resources not necessarily belonging to the same discipline (different functional areas) but are knowledgeable about or highly interested in the same topic
Objective	Promoting connectedness, creation, and knowledge sharing
Structure	<ul style="list-style-type: none"> Selected knowledge leader is responsible for defining the knowledge areas to be promoted and for coordinating the community Members of the knowledge community can voluntarily join the community, but a certain level of engagement is necessary to access all the benefits. There are two types of members <p>Core. Create knowledge and are recognized for this.</p> <p>Interested members. Part of the community of knowledge who are interested but are not obligated to contribute</p>

b) Communities of interest/practice (guilds)

Description	A community that groups together members from different disciplines who informally share a common interest
Objective	Promote connectedness and knowledge sharing (e.g., best practices) between a group of employees who share common interests
Structure	<ul style="list-style-type: none"> One member may voluntarily join all groups that interest them (there are no restrictions or formal requirements) Guild coordinator. A person responsible for defining the knowledge areas to be promoted and for coordinating the community

How to build a community?

Before establishing a community at DT operationally (see “Deutsche Telekom Community Navigator Tool” on YAM), three distinct strategic development stages must be anticipated in preparation:

Step 1) Develop a clear and timed purpose/objective for the community initiative.

Step 2) Decide on the appropriate formats (please see appendix for established formats at DT) that can be used to pursue the goal of the community; it is particularly important to consider whether educative, inspirational, or cohesive strengthening formats help pursue the goal of the community.

Step 3) Put the formats into an overall architecture and consider four levers:

1. **Alignment.** Align and coordinate community initiative with other already established initiatives in the organization (reduce redundancies and inefficiencies)
2. **Structure.** Create a schedule for the deployed formats (agenda, duration, location(s), etc.)
3. **Targeting.** Decide who should join the community or who should be addressed (target group)
4. **Perspective.** Ensure inward and outward orientation (for instance, involve different companies in the “Nite of Truth,” establish rotation with other companies, invite external speaker/experts to the “Kitchen Talk,” or involve external speaker/experts in “Working Out Loud” or a “BarCamp”).

For inspiration, please see the appendix for an example from ING, which developed an onboarding program to help employees build informal networks/communities from the beginning of their career at the bank.

What knowledge portal should be approached for agile?

Within YAM there is a dedicated group called All about agile; it is a central information hub for all dimensions of the agile compass. As part of this, the group addresses three dedicated goals:

1. **Inform.** Making the agile compass and other output from the Agile Blueprint project centrally available to consolidate knowledge and to ensure a uniform nomenclature within the organization.
2. **Involve.** Bundle existing initiatives/communities and enablement on agile and ensure accessibility to the entire workforce.
3. **Inspire.** Demonstrate agile thought convincingly by providing additional offers, such as inspiration that conveys an agile mindset.

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3. Additional information

What relevant enabling formats do we have at DT?

A key learning objective is to provide an introduction and step-by-step guide for how to develop a sharing mindset. These will soon be published on YAM.

Where can I learn more about this topic?

The following additional sources of information are helpful for understanding agile teams.

NAME	BRIEF DESCRIPTION	LINK
COMMUNITIES OF PRACTICE (COPS)	CoPs are organized groups of people who have a common interest in a technical or business domain. This article summarizes three distinct traits of COPs and their stages of development and operations	https://www.scaledagileframework.com/communities-of-practice/
HARNESSING THE POWER OF INFORMAL EMPLOYEE NETWORKS	Formalizing a company's ad hoc peer groups can spur collaboration and unlock value. Therefore, this article underlines the power and importance of informal networks	https://www.mckinsey.com/business-functions/organization/our-insights/harnessing-the-power-of-informal-employee-networks
THE ROLE OF NETWORKS IN ORGANIZATIONAL CHANGE	Companies should not focus on formal structures to the extent that they ignore the informal ones	https://www.mckinsey.com/business-functions/organization/our-insights/the-role-of-networks-in-organizational-change

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Appendix

a) Community formats at DT

BarCamp	BarCamp is an open conference with parallel workshops, whose content the participants develop and design themselves. At the beginning, participants collect topics that they want to work on. Participants are free to choose which topic they want to work on, while the person who contributed the topic takes over the moderation
Kitchen Talk	A presentation format that allows a speaker to talk about a topic in an open, accessible area (e.g., Future Work Kitchen) and stimulate a discussion. Kitchen Talks take place at lunchtime; snacks and drinks are available
Nite of Truth	An opportunity for three to five speakers to discuss failed projects and present key lessons learned. The format is part of a global movement that focuses on start-ups discussing their failures. Every speaker can talk for seven minutes and is allowed to employ up to ten graphics to make their point
Working Out Loud (WOL)	A method developed by John Stepper that was originally a self-learning program for individuals. The format is based on the idea that 4 or 5 people jointly go on a 12-week learning journey to reach a self-chosen learning goal. Participants can use social media, the Internet, or a company's internal digital platforms to reach this goal

b) Example/inspiration ING

At ING all employees take part in a common onboarding program before they move on to their permanent roles at ING. This helps employees to build informal networks that can be leveraged later on in their roles.



EXAMPLE ON-BOARDING PROCESS: ING HAS DEVELOPED AN ONBOARDING PROGRAM THAT HELPS EMPLOYEES BUILD INFORMAL NETWORKS FROM THE OUTSET OF THEIR CAREER WITH THE BANK

All employees will ...

Executives

Leaders (e.g., Tribe leads, POs)

Team members (e.g., developers, analysts)

... take part in a common onboarding program...



Duration: 3 weeks, occurs every month and is mandatory before starting

Contents:

- Training on how does Agile work?
- Participation in real client interactions (e.g., picking up the phone on an operations team)

Objective:

- Build valuable informal networks to be leveraged later on in their roles
- Get hands on experience with customers
- Understand how other areas of the bank work

... before they move on to their permanent roles



LIFE IS FOR SHARING.

2

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C	Governance
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8	Business steering	Link
The following questions can be answered by reading this HTG:		Click
Agile aspiration – which design criteria are crucial to consider?		
1. What are the major shifts?		
2. How does business steering differ in an agile organization from traditional organizations?		
3. How could an agile business steering concept look like?		
DT-relevance – which implications does this have on DT?		Click
4. How could an exemplary business steering process at DT look like?		
Additional information: Where can I learn more about the topic and whom to contact?		Click

9	Interface Management	Link
The following questions can be answered by reading this HTG:		Click
Agile aspiration – which design criteria are crucial to consider?		
1. How to identify and manage interfaces?		
2. What exactly would the interaction between the agile and traditional organization look like?		
Additional information: Where can I learn more about the topic and whom to contact?		Click

10	Resource Management	Link
<p>The following questions can be answered by reading this HTG:</p> <p>Agile aspiration – which design criteria are crucial to consider?</p> <ol style="list-style-type: none"> 1. What are the major shifts? 2. Which factors are essential for agile resource management? 3. How does resource management differ for managing agile teams? 4. What tasks are encompassed in resource sourcing? 5. What are techniques for resource planning and allocation? 6. What is the role of prioritizing for agile resource planning? 7. How is resource management incorporated in the agile business steering model? 8. Who is responsible for resource management in agile set-ups? 9. What are challenges of resource management for agile teams? 10. What are the main steps to create an efficient resource management for agile teams? 		Click
Additional information: Where can I learn more about the topic and whom to contact?		Click

11	Collaboration Framework	Link
<p>The following questions can be answered by reading this HTG:</p> <p>Agile aspiration – which design criteria are crucial to consider?</p> <ol style="list-style-type: none"> 1. What are the major shifts? 2. What are different layers of the collaboration framework? 		Click

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HOW TO STEER YOUR BUSINESS IN AN AGILE ENVIRONMENT?

In this document we first describe the aspiration for agile businesses, then we establish the DT context. Note: a situational analysis is required to assess the applicability of the elements described in this guide to a specific business area.

This how-to-guide is particularly relevant for:

Target picture \ Target group	Business/org. unit leaders	HRBP	Leaders	Employees
Applying agile ways of working	This how-to-guide solely assumes a full agile operating model as target image			
Targeting a full agile operating model	✓	✓	✓	

1. Introduction

Why is it important?

While it is well-known that agile working methods revolve around the concept “fail fast” iterative development, and autonomous teams, detailed long-term planning within traditional steering concepts can be seen as a challenge. Accordingly, this how-to-guide describes the realm of business steering in the context of agile organizational teams, units, and so on, focusing on the subject of business performance management. It does not seek to provide step-by-step instructions, but rather provides information on industry best practice, insights into benefits, drawbacks of the existing system, and also introduces potential new concepts.

What do we want to achieve?

Agile aspires to achieve selected shifts in the context of business steering.

From	To
Annual budget allocation	Repeated budget allocation throughout the year
Shareholder value maximization	Focus on customer value
Strategy as target picture for steering	Target picture broken down into themes, initiatives, epics, and stories
Detailed fixed target definition (eg, once a year)	Potential flexibility on target setting; importance of adapting to changes in response to iterations
Definition of fixed steering KPIs	As targets can shift (“fail fast” concept), success measures may change
Continuous KPI measurement	As KPIs can change frequently, continuous measurement may be challenging
Top-down definition of targets	Participation of agile teams in target definition (bottom up)

Note: The “From” dimensions are for illustrative purposes only and do not necessarily reflect the current DT reality.

Agile business steering, while more flexible, also follows clear protocols and targets with set boundaries: agile methodologies in their pure form always rely on a predefined target or requirements. In software development, for example, the product owner clearly sets the budget, the key features of the product, and the timeframe. These key requirements are not negotiable and set the frame for agile development teams.

2. How to get there?

How does business steering differ in an agile organization from traditional organizations?

To understand the path towards a business steering format that matches the demands of an agile, or at least hybrid, setup, it is important first to appreciate the pillars of traditional business steering. While there are numerous methods and models to steer businesses, the prominent principle of most of them is the maximization of shareholder value. Operating under this principle, the various models differ mainly in the selection and range of business metrics chosen to measure performance (prominent researchers are Rappaport, Lewis & Steller, Kaplan & Norton). Generally, targets and budgets are set and allocated annually top down by the board of management. A DT-internal example for this is the iPF-process (integrierter Planungs- und Führungsprozess) for financial planning. Here, the defined KPIs are tracked throughout the year to make sure that the defined targets are reached.

Steering models for agile setups largely follow these basic principles of target setting, alignment, and continuous performance measurement but vary in the specifics. Therefore, many elements in the table below will seem familiar.

The following table summarizes the core elements of agile business steering that will be addressed throughout this how-to-guide.

Core element		Importance for agile ¹
Group strategy, group targets, group priorities, group budget	Board of management sets group targets, strategy, priorities, and budget (relevance for agile team/unit/etc varies).	Must have (relevance for agile team/unit/etc varies)
Fixed capacity budgeting	Tribes/projects/teams get a fixed and fully allocated budget to fulfil a clear purpose for a fixed period of time.	Must have
Prioritization board	The prioritization board consists of all important stakeholders who are needed for regular alignment and decision making (not applicable for small-scale agile projects/teams, etc).	Nice to have
Alignment and performance measurement process	Alignment between various agile teams, tribes, and squads and performance measurement is ensured via regular (quarterly) business reviews (if applicable).	Nice to have
Prioritization within fixed capacity	Tribes and squads have decision authority to prioritize granular tasks and set targets that can be accomplished within their fixed capacity, and report results and progress in the regular (quarterly) business reviews.	Must have

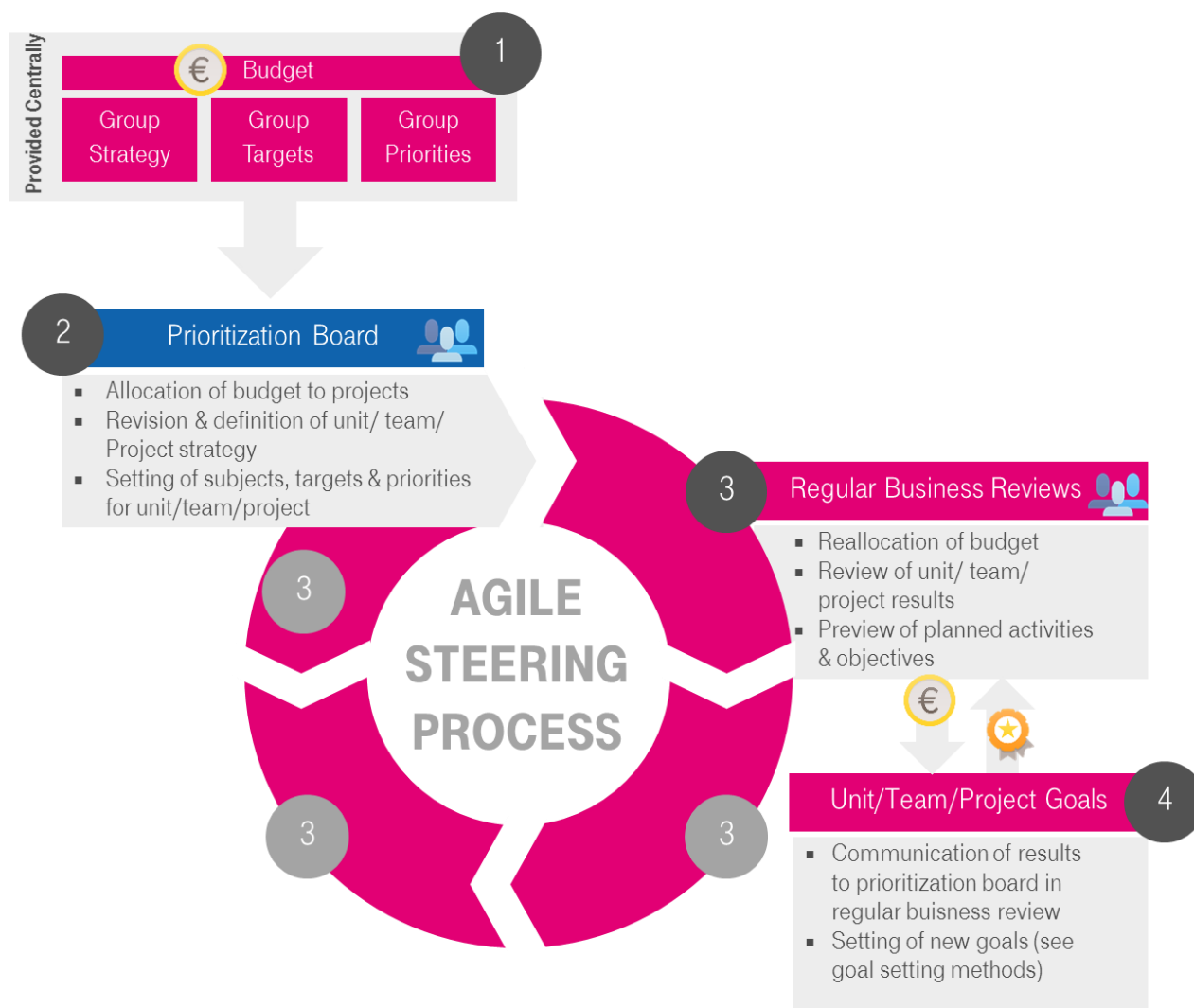
¹ Must have: essential pillar of agile operating model. Nice to have: additional enabler of agile operating model.

How could an agile business steering concept look like?

Agile business steering does not imply that the overall steering of large corporations will soon be managed in a fully agile way—quite the contrary. At the top level, the group-wide strategy and overall goals will most likely still be set top-down. This of course does not mean that bottom-up learnings and feedback cannot be incorporated in this group-level steering process.

For agile units and teams this means that they still need to align their potentially agile business steering with the overall corporate strategy, predefined targets, and allocated budgets. For example, if an agile unit has been commissioned to develop a new product, the set requirements for the new product need to be in line with the available budget and predefined (financial) targets. Here, it is essential that realistic targets and budgets are respected and that clear responsibilities are assigned.

Given that this applies, the next question concerns how the team itself can steer its business in an agile manner. Respecting the characteristics described above, one possible business steering concept could be as follows:



1

Centrally set budget, strategy, targets & priorities

The overall budget, strategy, targets and prioritization continues to be set centrally and follows the principle of maximizing shareholder value. At Telekom, this step is part of the yearly financial planning process (iPF). For agile units and teams, these centrally set criteria provide the frame within which they can operate. Also, it provides guidance for business leaders, who—in the name of their customers—commission the internal teams.

2

Prioritization board with general task of budget allocation, revision & definition of unit/team/project strategy, targets & prioritization

After the distribution of the annual budget, strategy, targets and priorities, the prioritization board of, for example, a segment/unit has the task to further distribute the segment/unit budget to other units/teams/projects. Besides the budget distribution, the role of the prioritization board is to ensure the alignment with the group strategy, priorities, and targets (such as financial targets, customer satisfaction, and so on). Members of the prioritization board can be business leaders within the respective segment/unit and, if applicable, the tribe lead, chapter lead, and resource manager. Optimally, the members represent all relevant stakeholders within the segment/unit which should each be represented to an equal degree. Prioritization board members also work as part of the unit/team/project on a daily basis (for example as chapter lead, squad lead, and so on), so that they are closely involved in day-to-day activities.

3

Regular Business Review for alignment and performance measurement

The regular business review is a format that the prioritization board uses to allocate budgets and align group targets with the segment/unit. Its purpose is to discuss past performance and future targets on a strategic level. It has the task of clarifying how individual tasks tie in to the overall strategy, creating transparency about ongoing activities, and setting a roadmap for the next term. The original concept has been first applied by companies such as Google, Intel, Netflix, and ING Netherlands. While details can be adapted to a unit's organizational needs, the review is often held quarterly with each unit/tribe presenting a short (perhaps six-page) summary of past achievements, outstanding tasks, and future goals for the next term. The actual meeting in which these papers are discussed can be referred to as a (quarterly) business review markets and it is attended by the unit/tribe lead.

Frequency. Even though often called a quarterly business review, the frequency has to match the segments/units needs and can be held more or less frequently.

Participants. Participants of prioritization boards should focus on including all people whose presence is required to make a decision. For the review of the unit/team/project results, it may make sense to invite not only the dedicated unit/team/project lead but also topic experts or other stakeholders. They can then best present results and provide insights on past and future activities.

Content. The specific content of a business review may vary, depending on the topics that need to be covered. In general, topics should be discussed on a strategic level, not an operational level. For example, regular business reviews discuss the return on investment—in other words, to what extent the last “product” increment fulfilled the requirements. Typical topics for a regular business review are return on investment, discussion of new use cases, new (potential) product features, roadblocks, decision needs, lifecycle stages, and benchmarking. Potential questions may be: Have we achieved what we set out to do? What are our next steps? How do we plan to get there? In this context it is recommended to communicate results and targets via a fixed set of measures that can be tracked and reviewed over time.

Budget. Based on the content of the business review, the prioritization board members decide on the amount of funding they allocate to the unit/team/project. This allows for enough flexibility, while ensuring transparency and reaching overarching targets. Basic principles for budget allocation in an agile environment are:

1. **Fixed capacity budgeting.** The allocated budget is stable until the next predefined review period to ensure a stable environment for agile teams.
2. **“What” definition of target.** The budget is clearly tied to a fixed target. For example, improving customer expectation by 20 percent. The target, however, cannot set the “how” or the way to achieve that target. That part is completely up to the agile team.
3. **No prioritization of tasks.** The prioritization of tasks to reach the target are the responsibility of the agile team.
4. **Lean KPI tracking.** The budget tracking/reporting should be supported by a lean set of KPIs that provides transparency but does not create excess work.

4

Goal Setting Methods

Within the business steering process, the next level of steering after the regular business review is steering within agile units/projects/teams. Here, the essential steering tool is goal setting. Thus, to clearly express targets and milestones for an agile project, a strategy for the goal setting process should be chosen. There are many different options, each with their own benefits and drawbacks. Below, you can find a comparison of the more popular methods:

Objectives goals strategies measures

- **Definition.** OGSM stands for **objectives, goals, strategies, measures**. It is a strategic planning methodology that defines clear goals and identifies the strategic choices to achieve them. In the OGSM model, the objective itself is the most important element and should be the basis around which to define goals, strategies, and measures. Objectives should be big, long-term, and should be a concrete reflection of the future. The final result should be a strategy one-pager that is easily shared and understood by the team members.
- **Benefits.** It provides a method for realistic, long-term goal setting and connects strategies to goals to tasks. Also, it helps to specify your target (what do I want to achieve?) and define your way to achieve it (how do I get there?).
- **Drawbacks.** While it suits situations with longer-term perspectives and resources, it might not be flexible enough for volatile environments where requirements and strategies can change frequently.
- **When to use.** This goal-setting method is applicable to projects in which it is important to emphasize the “how” dimension of a goal (how do we plan to get there?) and to those that are not located in a volatile environment with frequent significant changes.

Objectives & Key Results

- **Definition.** OKR is a method that is used to define and track goals/objectives and their outcomes (key results). It helps employees to understand how they can contribute to the company’s success. Companies such as Google and Intel already work with OKRs successfully.
- **Benefits.** The benefit is that OKR drives a company to attempt to achieve more and fosters innovative thinking.
- **Drawbacks.** At the same time, the 70 percent target achievement can be seen as a drawback, as you never achieve your targets completely. Also, the OKR method does not provide answers to the “how” for achieving your goal; it simply sets the vision and contributing key results.
- **When to use.** This method is particular suitable for projects that follow a visionary approach, where innovative ideas are required. Additionally, it is applicable to projects where the definition of “how do we get there?” does not have to be defined too closely.

Managing by objectives

- **Definition.** First introduced by Peter Drucker, managing by objectives is a model in which executives and employees agree on a fixed set of objectives. These objectives should be decided on before a new project or activity and need to be agreed upon by everybody. The executive needs to ensure that these objectives are aligned with the group's overall targets and goals. Progress and performance is then defined by comparing results to the agreed objectives.
- **Benefits.** The joint goal-setting process by employees and executives creates a common understanding and a sense of responsibility within the team.
- **Drawbacks.** The difficulty of this method is that it requires close performance management, which ensures that sufficient objectives are set. Additionally, this method makes it difficult to aggregate various smaller objectives to form the wider group objectives, especially when many other goal-setting methods exist within the organization.
- **When to use.** This method is applicable to projects where you want to encourage a sense of responsibility among your group/unit/team, as all members need to jointly agree on a set of objectives.

Of course, this model is a simplistic concept for business steering in an agile environment. Depending on the chosen agile framework, parts of the suggested process need to be adapted. Generally, however, this concept is valuable to bridge the gap between group-level decisions on strategy, targets, budgets, and so on, and the agile units and teams within the organization.

How could an exemplary business steering process at DT look like?

To make the described steering process more tangible, the example below sets out the steering process for a fictitious unit that consists of about 200 to 400 members. Of course, this example will not reflect each and every unit at DT but provides a realistic example for the application of the business steering process. It is based on expert interviews at Deutsche Telekom and best-practice examples in the literature. The unit is shaped by cross-functional teams, also referred to as a Flexible Organization (see *how-to-guide "flexible organizational archetypes"*) and consists of several expert chapters. The unit is working in project set-ups. Because projects often do not consist of many squads, the formation of tribes in this case is obsolete. For the unit steering, the following building blocks exist:

- **Board of management:** sets vision, strategy, and budget as part of yearly (financial) planning.
- **Customer/commissioner:** commissions a specific product or project and provides the target.
- **Prioritization board:** is responsible for budget allocation and topic prioritization for the entire segment.
- **Project team:** receives funds for a set time period and is responsible for delivering the commissioned product/project.

For this unit, the exemplary steering process according to the defined business steering logic could be:

- Board of management sets the budget according to the financial planning process and allocates a yearly budget to the unit. This is equivalent to step one in the depicted business steering logic.
- The prioritization board of the unit is now responsible for redistributing the budget to projects (new and existing). This step is equivalent to steps two and three in the depicted business steering logic. For this example, it consists of the chapter heads of the unit and further subject experts (finance, HR, and so on), as the organizational setup does not have tribes. Important here is the budget allocation with emphasis on a specific delivery of the project with a need for reapplication after the product increment has been achieved. This process allows the "fail fast" concept to operate and prevents the waste of budget to projects that then do not deliver the required value.

The budget distribution follows the following criteria:

- Selected project is aligned with general group targets and strategy.
- Selected project reflects group prioritization of subjects.
- Selected project fits within the unit budget

Selected project helps to fulfill set targets on a unit level

1. Project team receives fixed budget for a predefined time period and works on the project with a remit to achieve the defined project increment. For example, the product increment is the user interface for an improved IT tool for the organization. This step is equivalent to step four in the depicted business steering process.
2. After product increment (for example, the user interface) has been developed with the provided budget, the results are presented to the customer.
3. Based on the results of the product increment, the customer can decide to reapply for more funding to continue the project or can decide that the project does not deliver the promised value and stop it (repetition of step three in business steering logic). This process provides the opportunity to readjust the funding according to the actual need, as the customer needs to reassess the needed funds along the product increments.

Note: As the example is based on expert knowledge and best practice information, the detailed business steering process for each individual case has to be adapted to the specific organizational design, the employed agile methods, and other criteria such as volatility of environment, and so on.

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3. Additional Information

What relevant enabling formats do we have in DT?

A key learning objective is to provide an introduction and step-by-step guidance for how to steer business in an agile operating model. The respective enabling formats are soon to be published on YAM.

Where can you learn more about the topic?

The following additional information can be helpful for the understanding of business steering:

NAME	BRIEF DESCRIPTION	LINK
OVERVIEW GOAL MANAGEMENT METHODS	Description of various goal management methods	http://boardview.io/blog/a-5-minute-crash-course-on-5-goal-management-methods/
THE POWER OF THE QUARTERLY BUSINESS REVIEW	Introduction to the concept of quarterly business reviews	https://www.gainsight.com/customer-success-best-practices/quarterly-business-review-qbr/
WHAT ARE STORIES, EPICS, INITIATIVES, AND THEMES?	Definition and differentiation of agile terms	https://www.atlassian.com/agile/project-management/epics-stories-themes

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HOW TO MANAGE INTERFACES BETWEEN AGILE AND TRADITIONAL PARTS OF THE ORGANIZATION?

In this document we first describe the aspiration for agile businesses, then we establish the DT context. Note: a situational analysis is required to assess the applicability of the elements described in this guide to a specific business area.

This how-to-guide is particularly relevant for:

Target picture \ Target group	Business/org. unit leaders	HRBP	Leaders	Employees
Applying agile ways of working	This how-to-guide solely assumes a full agile operating model as target image			
Targeting a full agile operating model	✓	✓	✓	✓

1. Introduction

Why is it important?

The Interface describes the point where two systems (for instance, subjects, units, or organizations) interact with one another. In every organization there are various transparent as well as opaque interfaces, each with distinctive formal and informal interactions and supporting tools and protocols. Particularly, in an organization where agile and traditional parts of the organization work together, it is important to identify these interfaces and ensure effective collaboration within the agile part as well as between the agile and the traditional part of the organization.

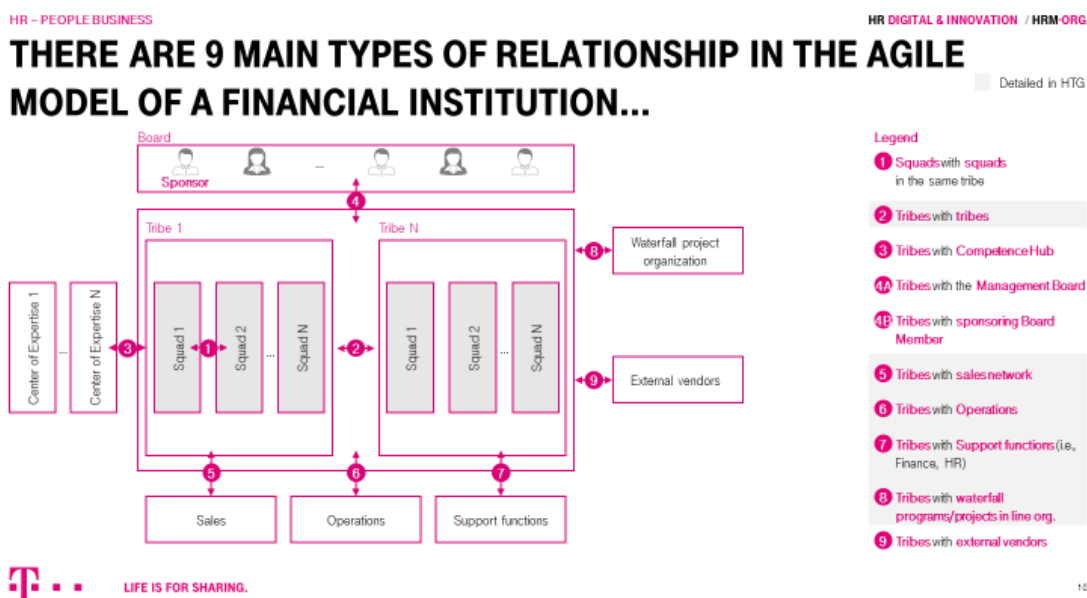
In this overview, we present a conceptual approach to analyzing and managing interfaces between agile and non-agile departments and business units. Then we explain five types of interface and how they can be managed.

2. How to get there?

How to identify and manage interfaces?

To understand and manage the interfaces between agile and traditional parts of the organization requires a detailed assessment of interfaces at a granular level (for instance, at unit level). To do so a three-step approach is recommended:

First, this involves identifying all interfaces for each agile unit, or every unit that is planned to work in an agile way in future. The result of this analysis can be depicted on an “interface map” (see the example of a financial institution below):



Second, it is about understanding the nature of each interface—therefore the focus should be on the following aspects:

Point of analysis	Description
Purpose of the interface	Understand why the interface is needed/required for (e.g., knowledge sharing, relationship management of customer/suppliers etc.)
Process	Understand how the interface is managed—i.e., which medium is used (e.g., regular meetings, informal exchange, or ad hoc requests) and which supporting instruments are deployed (e.g., software tools)
People	Understand who is involved and how—i.e., understand who is responsible, accountable, consulted, and informed

Third, interfaces should be adjusted to allow for effective exchange/collaboration between the agile and traditional parts of the organization without adding an extra governance layer. Moreover, those adjustments should be carefully monitored and refined if required. In the next part of this document, we provide examples for two selected interfaces.

What exactly would the interaction between the agile and traditional organization look like?

Example 1: Tribes with competence hub

When a tribe needs staffing or expert support, the tribe lead should reach out to a competence hub. The request should define the squad where the competence hub employee will be staffed, describe the backlog item the employee will work on—derived from the squad's purpose and KPIs—and clarify the duration of the assignment. To make efficient use of scarce resources, the request should also define the skills required for the task; squads should not hoard talent. With respect to simplicity and standardization this process should be fully integrated in the Quarterly Business Review (QBR) format process.

In responding to requests, the head of the competence hub should set clear priorities. At the top of the list would be squads that directly support daily sales (for example, by delivering leads to the sales network) and squads supporting delivery of new products sold to customers.

Staffing conflicts should be resolved by relevant tribe leads and the head of the competence hub, taking priorities into account along with competence hub employee locations, development needs, and preferences. Staffing conflict that cannot be resolved by the tribe leads and head of competence hub may be escalated to the relevant board member or members.

After the competence hub employee is assigned, he or she delivers in the squad for an agreed period and then returns to the competence hub staffing pool and becomes available to other squads.

The head of the competence hub manages the staffing schedule. Staffing conflicts stemming from extensions are handled in the same manner as other staffing requests.

Certain competence hubs may establish additional rules of cooperation with non-agile departments covering similar subjects, such as quality, to make the best use of synergies, including knowledge exchange and strengthening the organizations representation during external conferences.

Example 2: Tribes with sales network, tribes with operations, and tribes with support functions

Operations and support functions such as HR and Finance may appoint subject-matter experts to support squads, and staff their own employees to squads just as the competence hub does. Again, the process has three main steps, beginning with a request from a tribe lead. The head of the relevant function manages the request, which might mean providing consultation or touch on sales network matters.

This assistance is either provided on a part-time (i.e., experts are not co-located with the squads and continue to perform their regular duties), or full-time basis (i.e., collocated for certain sprints).

Example 3: Tribes with waterfall programs/projects in line org.

Cooperation between tribes and waterfall programs/projects in line organization begins with the quarterly business review, where program deliverables are cascaded to tribes. Tribes and waterfall programs/projects select program objectives or deliverables based on five criteria:

- Business priority
- Tribe capacity
- Feasibility of working on prototypes or minimum viable products
- Fixed deadlines
- If vendors are involved, their ability to cooperate with tribes in agile ways.

Based on these priorities, deliverables are cascaded to tribes, and the line program manager monitors delivery.

Tribes receive program objectives for specific quarters, which tribe leads translate to deliverables or backlog items and cascade into the squads' backlogs. Squads deliver cascaded deliverables as they do with regular backlog items. The relevant program manager participates in each squad demonstration to track progress of deliverables.

Where progress needs to accelerate, the program manager discusses reprioritization of backlog items with the relevant product owners. If they cannot reach agreement, they escalate the issue to the tribe leads or relevant board member or members.

The program manager might participate in sprint planning to stay informed of the progress on deliverables. Minimum documentation is required, but each squad's backlog, by default, should include preparations to meet internal or external needs.

3. Additional Information

What relevant enabling formats do we have in DT?

A key learning objective is to provide an introduction and step-by-step guidance for how to establish interfaces between the agile and traditional part of the organization.

The respective enabling formats are soon to be published on YAM.

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HOW TO ENSURE THAT AGILE TEAMS ARE EQUIPPED WITH THE RESOURCES REQUIRED?

In this document we first describe the aspiration for agile businesses, then we establish the DT context. Note: a situational analysis is required to assess the applicability of the elements described in this guide to a specific business area.

This how-to-guide is particularly relevant for:

Target picture \ Target group	Business/org. unit leaders	HRBP	Leaders	Employees
Applying agile ways of working	This how-to-guide solely assumes a full agile operating model as target image			
Targeting a full agile operating model	✓	✓	✓	✓

1. Introduction

Why is it important?

One key element to ensure the successful implementation and operation of agile units, departments, and teams, is resource management. Generally, resource management is the efficient and effective utilization of available resources to fulfill a fixed set of tasks, including staffing (human resources), budgeting (financial resources), inventory management, production resources/capacity, and management of IT. This how-to-guide focuses on resource management for agile setups in terms of staffing, capacity management, and skills management (for more information regarding budgeting, please *see how-to-guide "business steering"*). This how-to-guide starts by setting out traditional resource management/staffing methods and explaining how the requirements for staffing in agile teams are different. It moves on to provide some examples of best-practice agile resource management both from academia and other industries. This is followed by a detailed profile of a unit (using a made-up example) organized according to tribe and squad logic of (for more details on this subject, please *see how-to-guide "flexible organizational archetypes"*). All best practices and examples from the literature that are provided in this how-to-guide should be seen as guard-rails.

Note: The actual application of the best practices and examples described here must be seen in the context of the individual specific requirements and should be aligned with the respective social partner.

What do we want to achieve?

Agile resource management mainly differs from traditional approaches in its focus:

From	To
Long-term staffing, long inflexible cycles	Flexible staffing that allows quick adjustments as needed
Top-down resource allocation	Resource allocation by team
Staffing as match of tasks to skills (underlying question is who can perform what task?)	Staffing as match of skills to tasks (underlying question is what skills do we need to perform the task?)

Note: The “From” and “to” dimensions are for illustrative purposes only and do not necessarily reflect the current DT reality.

2. How to get there?

Which factors are essential for agile resource management?

The following table sets out the essential elements of resource management by task as they will be addressed throughout this how-to-guide.

Resource management elements	Task	Importance for agile ¹
Sourcing	Anticipation of future skill needs	Must have
	Addressing of skill gaps and optimization of skill portfolio	Must have
Planning	Ongoing capacity planning	Must have
Allocation	Creation of transparency of available capacity	Must have
	Resource allocation (e.g., staffing)	Must have
	Ensuring balanced utilization	Must have
	Ensuring overload protection (<i>"Belastungsschutz"</i>)	Must have
	Resource management as part of regular (often quarterly) business review (if applicable) ⁴	Must have (if applicable)
Prioritization	Prioritization of tasks/projects/squad missions (depends on complexity and volatility of environment)	Nice to have
Dedicated resource management role (individual or team, depending on size)	Responsibility of tasks above bundled within one role (depends on complexity and volatility of environment)	Nice to have
¹ Must have: essential pillar of agile operating model. Nice to have: additional enabler of agile operating model.		

⁴ Only applicable for agile projects that are steered with a regular business review process as described in the *how-to-guide Business Steering*.

How does resource management differ for managing agile teams?

- First of all, the basic concept of resource management for agile and non-agile teams remains the same: the goal is to maximize resource utilization and workload distribution for the best possible output. What's different, however, are the requirements for resource management in agile and non-agile environment. In non-agile environments, the tasks and resources are relatively stable over time and only need occasional adjustments; these are often managed in fixed review cycles. Agile environments, by comparison, are often shaped by volatility, uncertainty, and frequent change—resource management for agile environments needs to be effective in these situations. One main difference between traditional and agile resource allocation is the general focus: while traditional resource management focuses on the available people and skills and then matches tasks to the skills, agile resource management focuses on the tasks to be done and then identifies and matches the available people and skills. Even if there is no major difference in final outcome, this distinction reflects the essential emphasis on the outcome/final product that sits at the core of agile values. Other factors that significantly impact the requirements for resource management in agile environments are:
- **Cross-functional coordination and cooperation.** Agile ways of working are built on the concept of having end-to-end responsibility for a specific product/project increment. This usually means having a team comprising members with various skills. For example, developing a user interface in an app requires not only app programmers, but also design specialists, subject experts (e.g., sports experts for a sports app), and IT specialists for interfaces to other systems. For resource management, this means that the pool of resources must be large and diverse enough to staff projects and teams with an adequate skill portfolio to perform the task. Therefore, the traditional approach where experts from one specialist unit (app programmers) were staffed into a team with an assignment and then, after completion, passed it on to the next specialist unit (for example, design specialists) who might be busy with other tasks does not work in the agile work context.
Key message: skills portfolio must be diverse enough to allow staffing with a focus on end-to-end responsibility for product/project increments.
- **Flexibility.** Another difference for resource management in agile teams is the level of flexibility required. Agile ways of working demand fast results through short sprints with fixed deliveries. Traditionally, people were staffed for extended periods of time; in agile environments teams are constantly changing according to the skill profile needed to get the task done. While this is true for agile projects in general, it becomes even more apparent in the case of sprints. For each sprint, which can vary in time, a fixed delivery to be achieved is defined. The team is then selected according to skills necessary to achieve the defined delivery. Once the delivery has been achieved and the sprint is over (say after two weeks), new deliveries for new sprints are defined, which can require a new set of skills. The resource management approach must be flexible enough to facilitate this.
Key message: staffing flexibility is key to ensuring that teams with frequently changing tasks/deliveries are constantly equipped with the right set of skills to perform.

- **Dedication.** Alongside the required cross-functional skill set and necessary flexibility, agile teams also require a high degree of dedication to the task from members. For agile resource management, this means that people are preferably staffed to one team/project for 100 percent of their time. The time period can, of course, vary depending on the length of the sprint but dedication helps teams to perform at their best and finish the tasks the quickest. In other industries, however, this topic is handled with great variability. At Facebook, as an example, experts work within a dedicated team but simultaneously act as subject matter experts and consultants for other teams.

Key message: while the literature says that 100 percent capacity dedication of team members for the length of a sprint is essential for optimal performance, in reality the level of dedication has to be adapted to the daily business reality, and “the optimum” can vary significantly across teams.
- **Team performance.** Another important factor that has received attention in the literature (and is definitely not part of the classic approach towards resource management) relates to team spirit and the interrelationships between members. It has been shown that teams increase their performance over time as they undergo the so-called storming, norming, and performing phases of group development.⁵ Therefore, it can be beneficial for optimal performance to keep experienced teams together where possible and to respect personal preferences—this last point could, for example, be taken account of by including team members’ staffing preferences into the staffing decision.

Key message: while a high level of flexibility to ensure the right staffing for short time periods is essential, teams’ performances increase over time; therefore, optimal staffing decisions should attempt to reduce team fluctuations after the right skill set within the team has been ensured—information about past team compositions is essential.

What tasks are encompassed in resource sourcing?

Resource sourcing includes the task of anticipating future skill needs and addressing current skill gaps to optimize the skills portfolio.

- **Anticipation of future skill needs.** A forecast of skills portfolio development is essential to ensure a long-term skills portfolio that suits the tasks to be performed. For example: which team members will leave the team (sabbatical, retirement, and so)? Will there be a task shift in the future that requires different skills?
- **Addressing current skill gaps.** This requires Identification of current skill gaps and continuous exchange with responsible team lead (such as the chapter lead, competence hub lead, line manager, and so on)—for example: what are the current skill gaps? What measures can be taken to close them?
- **Optimize skill portfolio.** Based on these two tasks, optimize the current skills portfolio in close collaboration with people development and HR.

⁵ Tuckman’s stages of group development: The forming–storming–norming–performing model of group development states that these phases are all necessary and inevitable in order for teams to grow, master challenges, solve problems, find solutions, plan work, and deliver results.

What are the techniques for resource planning and allocation?

To allow for the best possible resource allocation, various techniques can be used. The following is a short overview of popular techniques that can be used for resource allocation.

- **Critical path, resource leveling, and resource smoothing.** These three activities fulfill different functions but together optimize the resource-allocation process. These techniques are generally valid for resource allocation for waterfall and agile resource-allocation processes.
- **Critical Path Method (CPM).** The CPM simply assesses the fastest completion date of a task by taking into account the interdependencies of activities and provides the optimal amount of resources (people). For example, activity B can only be completed after activity A has been finished. Only then activity C can be started.
- **Resource leveling.** Resource leveling looks at resource constraints. For the example, if all activities take one day, the fastest completion date would be after three days under the constraint of having only one resource. Even if activity A and B could be performed in parallel, which theoretically could result in a two-day completion time, the constraint of only having one resource would not allow it.
- **Resource smoothing.** Resource smoothing looks at task distribution among the available resources and has the goal of avoiding peaks and troughs.
- **Focus factor.** In an ideal world, having followed the critical path mode, and resource smoothing and leveling, the optimal outcome would now be a 100 percent utilization rate of all resources across projects. This is the theoretical outcome; in reality, however, people need time for other topics outside their assignment. These include tasks such as administration (booking hours, handing in vacation days, and so on) or skills development (attending trainings, participating in coaching sessions). Therefore, 100 percent resource allocation is not desirable in the real world. It could frustrate people and harm their motivation and productivity in the long term and to some extent inhibit people in their personal and professional development. Therefore, a focus factor can be introduced. This can range from 0 (no time spent on a project/task/squad mission) to 1 (100% of time spent on project/task/squad mission), and realistically lies between 0.7 and 0.9. Popular examples are different consultancies where people work on projects from Monday to Thursday, often at the client's office, but spend Fridays in their home office and have time for other tasks (such as filing travel expenses, internal project). Here, the focus factor would be 0.8. Another example from within DT is the 80/20 model, where employees can look for projects and tasks they are interested in and dedicate 20 percent of their time towards them. This concept is especially important for agile working models, where team motivation is key to success. Also, agile working models strongly build on creativity and innovation that is fostered when people have the time to follow their professional interests, learn new skills, or master existing ones.
- **Resource boxing.** Resource boxing is adapted from the term "timeboxing" that describes a fixed time period which is tied to a specific deliverable (also called a sprint). As the name implies, the time box specifies the deliverable in terms of time to completion. Since timeboxing is a general concept for agile ways of working, resource management has to make sure to provide the required resources. As the subjects of resource management are human resources (employees), resource boxing describes the number of specifically skilled employees required for the period of a sprint. For example: For a sprint of 10 working days, 3 design experts are needed. Therefore, the resource box "design experts" equals 10 working days multiplied by 3 experts, which equals 30. The same concept can then be applied to other specialists to create further resource boxes. This simple technique can help resource management cope with the wide staffing variability typical of sprints.

What is the role of prioritization for agile resource planning?

Prioritization is an important consideration in resource management as resources are usually scarce while tasks are plentiful. Therefore, resource management has to be aligned closely with the team to ensure that the most important tasks are prioritized. Often, prioritization ties in closely with resource allocation and planning techniques, so that an explicit prioritization might not be required. In environments with a significant variety of tasks, a suggestion of task prioritization could be: 1. Urgent individual tasks (such as board requests, tasks with high risk, tasks with a strict deadline, and compliance exposure). 2. Project/squad/team tasks. 3. Non-urgent tasks.

How is resource management incorporated in the agile business steering model?

Resource management is an essential component of business steering (for details on business steering in an agile environment, please see how-to-guide on agile Business Steering). However, due to the frequent changes, resource management should be as flexible as possible and not reliant on formal meetings. Still, overarching resource management decisions could be formalized as part of the regular business review that addresses general resource decisions, such as decisions on size of teams for new/exiting projects. Resource manager or equivalent team members with resource management responsibility are recommended to be part of the proposed prioritization board of an agile business steering process. Here, within the process of regular (quarterly) business reviews, resource management decisions are made at an overarching level—for example, decisions on broad staffing dimensions for new projects (such as, do we need 10 or 100 team members for this project?). Furthermore, resource management supports prioritization decisions by contributing detailed knowledge of the skills/talent portfolio. During daily business, however, it is recommended that resource requests be handled as they occur to enable agile teams to perform at their best.

Who is responsible for resource management in agile set ups?

Another aspect of resource management is the question of responsibility. Here, there is no generally valid answer. Depending on the size of team/unit/ and chosen organizational archetype, there are three possible options for the responsibility of resource management:

1. Archetype cross-functional teams or competence hub

Chapter lead. If the organizational structure follows the tribe and chapter logic (see how-to-guide Organizational Archetypes), staffing decisions could be the responsibility of the chapter lead. As chapters are competence clusters, the chapter lead would be the interface to the different available projects and staff the chapter members accordingly. Here, the cooperation between chapter leads and tribe lead is essential to ensure an optimal outcome. Benefits are that the chapter lead is in close contact with the members and thus has a detailed picture of skill profiles and personal preferences. For especially large teams, however, this task could consume too much of the chapter lead's time so that (s)he has to neglect other tasks

2. Archetype cross-functional teams or competence hub

Resource manager (team). For larger teams, (say, exceeding 100 members), it can be recommended to formalize the function of resource management and have a full-time resource manager as a support role for the entire team. The number of dedicated resource managers can then be adapted as needed (depending on size of team and level of staffing flexibility required). This approach can be encountered in many larger corporations that aim to convert whole segments into an agile organization but are suddenly faced with very complex staffing decisions to ensure end-to-end responsibilities in teams

3. **Self-organizing teams (not used in DT AG)**

Team. The staffing responsibility could lie within the team, where the team decides on staffing needs as they occur and independently allocates skills where they are needed. This option provides a very high degree of autonomy to the team, can lead to high levels of team performance as personal preferences can be factored in, and can be handled flexibly without greater administrative effort. In many smaller teams, this process is part of the regular routine in organizing tasks among members, especially for teams that work in project setups with many ad hoc tasks. For larger teams (perhaps larger than 20 people in total), the self-organization reaches its limits and does not provide the needed transparency.

For more information about the archetypes of organizational design, please see Enabling OrgDesign – Deep Dive Flexible Organization

What are challenges of resource management for agile teams?

The challenges for resource management largely remain the same for agile and non-agile teams: for example, the challenge of achieving an appropriate level of transparency around resource utilization, while at the same time preventing close employee surveillance. This topic is often the focus of social partner negotiations. While there are many software-supported solutions that can provide a great level of transparency down to the individual hourly utilization level for optimized workload distribution, such tools could also be misused as a monitoring tool that tracks individual behavior and performance over time. Therefore, software solutions for resource management need to have a secure access management concept in order to comply with data privacy and security legislation and accessibility. At Deutsche Telekom, a tool that has been in use since 2015 is Competence. Provisioned by Data Assessment Solutions GmbH through Tel-HT, Competence is a customized resource management solution based on Decidalo (the general resource management solution by Data Assessment Solutions GmbH). Of course, it complies with all current legislation and has been approved by the social partners. Depending on the specific requirements, this solution can also be customized to the specific needs and requirements of units and teams. Other solutions that might come to mind first and are handy for smaller tasks and teams, such as an Excel spreadsheet, often violate current legislation and thus should be avoided.

What are the main steps to create an efficient resource management for agile teams?

1. **Responsibility for resource management.** Depending on the size of team and, of course, the organizational design or archetype, the responsibility can be vested in the team, the chapter lead, or a formalized resource-management role.
2. **Skill definition and skill gap identification.** To allow for an effective staffing process, resource management needs to have a detailed skill profile overview. Often, skill profiles are harmonized across the entire organization. Therefore, this step may require the adoption of formalized skill profiles at the organizational level to be able to adequately reflect the skill set reality within the agile team. Also, resource management is responsible for detecting current skill gaps, anticipating future gaps, and optimizing the skill composition of the team.
3. **Transparency of allocation.** For larger teams, support via software tools is recommended. An available tool at Deutsche Telekom is Competence (provisioned by Data Assessment Solutions GmbH). Additionally, it should be highlighted that the chosen software tool of course needs to align with the selected resource management criteria.

4. **Allocation/staffing decision process.** For the staffing decision, the process needs to be mapped according to the steps to be followed. Questions to be answered are:
 - a. **Frequency of staffing decisions.** How frequently do we need to adjust the staffing?
 - b. **Responsibility.** Who is responsible for staffing decisions? Here, it can be beneficial to apply the RACI logic to answer the question of who is responsible, accountable, consulted, and finally informed. While each answer needs to be adjusted to the specific team, an example might be:
 - Responsible: resource manager
 - Accountable: unit lead/head
 - Consulted: chapter lead, subject expert, and/or team lead
 - Informed: team member
5. **Setting of staffing decision.** Here, it has to be decided whether the decisions are to be formalized (for example in a dedicated staffing meeting) or if they simply happen on a rolling basis. Depending on the size of the team, staffing decisions can also be split into two parts: 1. General broad staffing decisions as part of the regular (quarterly) business reviews (see how-to-guide Governance Business Steering); 2. Daily staffing decisions to allow for sprint flexibility.
 - Prioritization of tasks/projects/squad missions: What criteria do we use to assess priority?
6. **Staffing criteria.** Here, it has to be decided which factors are taken into account. While time availability and skill profiles are of course required factors, other such as preferences, individual development interest and goals, the focus factor, and potentially previous work experiences can also be factored in.

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3. Additional Information

Which relevant enabling formats exist in DT?

A key learning objective is to provide an introduction and step-by-step guidance to ensure that agile teams are equipped with the resources required?

The respective enabling formats are soon to be published in YAM.

Where can you learn more about the topic?

The following additional information can be helpful for the understanding:

NAME	BRIEF DESCRIPTION	LINK
AGILE PRINCIPALES – ORIENTATION FOR RESOURCE MANAGEMENT	Description of agile values that are important for resource management	https://meisterplan.com/de/blog/agile-prinzipien-als-orientierung-fuer-ressourcenmanagement/
AGILE RESOURCE MANAGEMENT: TUCKMAN'S MODEL	Article on unresolved resource management questions and the important of team performance	https://www.linkedin.com/pulse/resource-management-vs-agile-david-shrimpton
RESOURCE ALLOCATION TECHNIQUES	Collection of resource allocation techniques	http://prosymmetry.com/know-your-resource-management-techniques/
RESOURCE CAPACITY PLANNING FOR AGILE TEAMS: THE FOCUS FACTOR	Detailed description of the focus factor	https://project-management.com/resource-capacity-planning-for-agile-teams/
THE CHALLENGES OF RESOURCE MANAGEMENT IN OUR AGILE TEAM (FOR NON-CROSS-FUNCTIONAL TEAMS)	Experience report on resource management and its challenges for agile teams at University of St Andrews	https://digitalcommunications.wp.st-andrews.ac.uk/2015/11/09/the-challenges-of-resource-management-in-our-agile-team/

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HOW TO DEVELOP A COLLABORATION FRAMEWORK AS A BASIS FOR AGILE TRANSFORMATION?

In this document we first describe the aspiration for agile businesses, then we establish the DT context. Note: a situational analysis is required to assess the applicability of the elements described in this guide to a specific business area.

This how-to-guide is particularly relevant for:

Target picture \ Target group	Business/org. unit leaders	HRBP	Leaders	Employees
Applying agile ways of working	This how-to-guide solely assumes a full agile operating model as target image			
Targeting a full agile operating model	✓	✓	✓	✓

1. Introduction

Why is it important?

One key element in an increasingly dynamic market environment is to react and adapt to constantly changing customer needs and internal as well as external requirements and changes in a timely manner. Therefore, more and more organizations are embarking on an agile transformation journey. This means, you critically analyze your existing ways of working in your organization and transform them into (more) agile ways of collaboration.

Nevertheless, your journey does not start from a blank sheet of paper. Your organization is already functional and produces results. Therefore, the goal of the creation of a collaboration framework is to

- first identify best practices and success patterns of your organization and
- second to surface gaps or potentials to improve your organization's agility and performance.

This way you keep and appreciate what is working as the starting point of your agile journey and you are able to concretely and continuously add specific agile practices where they make a real difference in your organization's performance.

What do we want to achieve?

This guide's objective is to describe the process of developing a collaboration framework as a basis for agile transformation in general and to provide practical recommendations how to create such a framework for your organization. In this context, the guide refers to the approach used to develop the collaboration framework of the DT unit HR Digital & Innovation (for more information, please see Case Study).

Moving to a framework that supports agile collaboration requires the following shifts.

From	To
Implicit ways of working (unconscious practices and non-transparent rules)	Explicit descriptions of collaborating (conscious practices and transparent rules)
Non-transparent information flow and decision-making processes	Transparent information distribution and decision-making processes
Unclear distribution of authority	Clear decision-making processes
Static job descriptions	Dynamic roles and responsibilities
Taking an org design for what it is and being accidentally agile	Iteratively shaping and adapting your org design to become more and more agile
Not having a vocabulary to talk about agile transformation	Having a vocabulary and a grammar to talk about your own agile transformation

Note: The “From” dimensions are for illustrative purposes only and do not necessarily reflect the current DT reality.

What are the different layers of the collaboration framework?

1. Purpose

By purpose we mean the difference that only your organization can make. Your purpose is a vital source of people's inspiration and creativity. It is energizing and powering your organization's agile journey.

Example for a purpose:

"We make Telekom a better place to work."

2. Values & Principles

By values we mean what the people in your organization appreciate in their leaders, peers and work. They are qualities that do have an emphasis and a positive meaning for. By principles we mean fundamental guidelines that lead the thinking and actions of the people in your organization. Values as well as principles are written as ambitions that you are already fulfilling or strive to achieve.

Example for a value and respective principles:

User-Centricity: We value that every employee directly faces the customer to develop user-centric products that satisfy true demands, provide added value and unique experiences. We believe that our products and innovations are only successful if they satisfy a real user problem.

3. Practices

By practices we mean types of procedures and operations how you do things in your organization such as meeting practices, decision making processes, etc. A practice is considered a practice for the whole organization if more than 50% of the employees practice it.

Example for a practice:

Rapid iteration: We develop our products applying agile methods to ensure user-centricity, enable flexible development cycles and cost-efficiency. We are willing to test and experiment with new things. We prefer to discover failures sooner rather than later to keep our learning curve steep.

4. Artefacts

By artefacts we mean any concrete object that is employee-created and used by the organization such as room arrangements, channels of communications, templates, lists, boards, rituals, symbols, etc. An artefact is considered an artefact of an organization if more than 50% of the employees use it.

Example for artefacts:

Agile Methods

- Design Thinking
- SCRUM
- Kanban

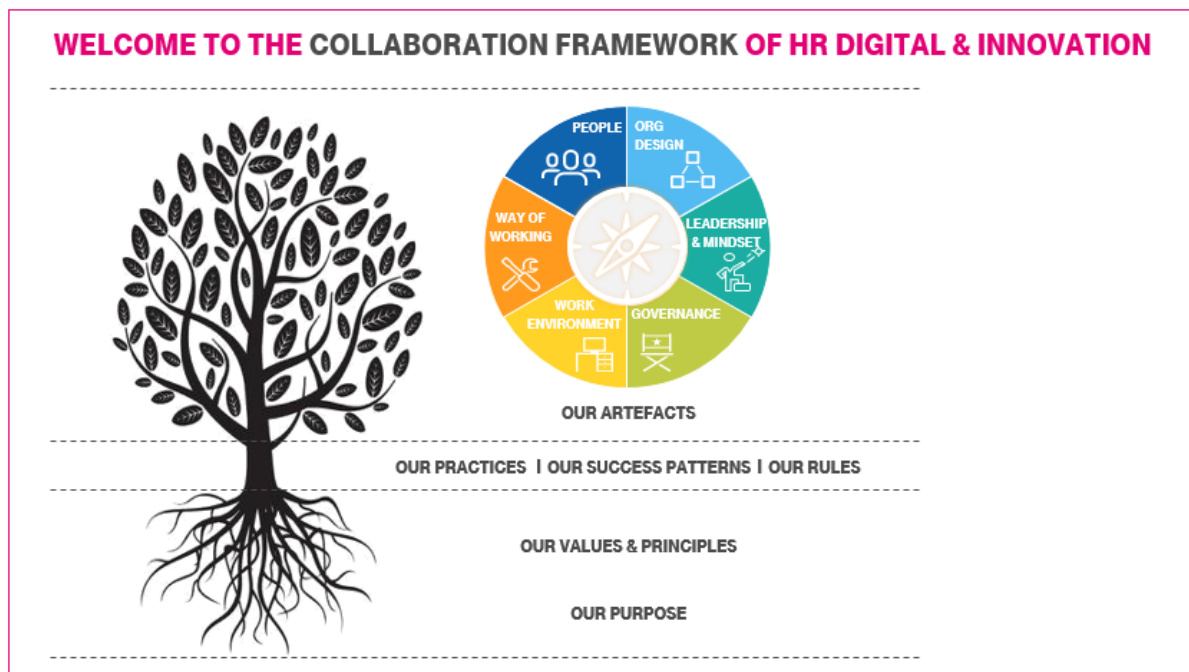


Figure 1: Landing page of the D&I collaboration framework

2. How to get there?

What are the steps to develop a collaboration framework?

The following blueprint describes the steps how your implicit ways of working become explicit ways of collaborating summarized within one coherent framework in the end:

1. Set up a core team

Allow for a team of four to five persons to form ideally **“a coalition of the willing”** truly interested in creating a collaboration framework for your organization. Have the team draft a roadmap for the journey based on the how-to-guide and inform the organization about their mission, project goals and task.

During the journey the **team is responsible** to:

- support and commit to the whole journey
- keep track of milestones on the roadmap
- report to sponsor(s) or relevant stakeholders
- keep organization informed and engaged e.g. ensure regular iteration and feedback
- coordinate sprints of workstreams, if sub-teams are formed around specific themes (e.g. roles and responsibilities, values and principles, ...)
- synchronize outcomes of workstreams
- deal with resistance to change from the organization

If you are looking for candidates for the core team, they ideally like to take on such responsibilities, have a passion for organizational development and change and enjoy putting together the puzzle pieces of the collaboration framework of your unit.

2. Uncover your layers

The first step of your analysis is to **understand how the work in your organization gets done today**. In order to start the transformational journey, you want to know about your status quo, since you do not want to pour out the baby with the bath water. You want to keep what is working well while beginning to see where agile ways of working will yield better outcomes.

- a) Develop a **qualitative questionnaire** to elicit your organization's purpose, values and principles, practices and artefacts, e.g.:

Layer	Questions
Purpose	What difference do we make? What gets us out of the bed in the morning?
Values	What qualities do we appreciate in our work and in each other?
Principles	Which aspects guide our thinking and acting?
Practices	How do we collaborate? How do we decide? How do we keep each other informed? How do we work with clients?
Artefacts	What does our work space look like? What meetings do we have? What are our important documents and communication channels?

- b) **Interview a representative group of employees** in your organization. Ideally the interview candidates are a good mix of different perspectives on the organization (e.g. leaders/managers, drivers, pioneers, stability providers, ...). You want to be able to elicit the good and best practices on all levels (vertically and horizontally).
- c) **Summarize findings and consolidate results** for each layer (in the layers of practices and artefacts you might want to use the six dimensions of the Agile Compass to already cluster findings accordingly).

3. Build a first prototype of your collaboration framework

By **taking the framework and filling in the results from the interviews**, the team begins to build the first iteration of your collaboration framework. Each layer will be filled with the descriptions as they stand today. Any ideas or suggestions for future improvements, obvious gaps and potentials or unclear areas will be captured and stored in a "Future Org Development Topics"-List.

4. Take the “Agility Check”

As an organization, take the Agility Check related to the Agile Compass and **compare the findings with your first collaboration framework**. The team will review:

Questions
How well are we already doing regarding the six dimensions of the Agile Compass?
Where do we have the biggest room for improvement?
What’s already on our “Future Org Development Topics”-List?
On which dimension(s) do we want to focus when starting our agile transformation journey?
...

5. Share the findings with your organization

Share the results of the Agility Check and the first prototype of the collaboration framework with your organization and invite them to give **feedback**.

The goal is

- to agree on the starting point of the agile transformation journey (“Our Collaboration Framework Version 1.0”) and
- to identify and prioritize key areas to focus on to become (more) agile.

6. Publish your “Collaboration Framework Version 1.0”

Publish your Collaboration Framework Version 1.0, e.g. as a digital SharePoint team website, using an attractive layout. This creates **transparency and exposure** for the framework in case

- new and existing employees seek orientation,
- new additions or changes are made in the future (living document),
- you want to track your progress on your agile journey
- customers or external partners like to know how you work

7. Introduce (more) agile ways of collaboration

In the next step, the core team suggests key areas they want to focus on to become more agile in alignment with the organization. Depending on the focus, various agile elements (e.g. roles and responsibilities, agile working methods) can be introduced and tested to **gradually transform your unit** into an (even more) agile organization.

8. Housekeeping

Given the changing business context, you should **review and discuss all items of the collaboration framework regularly**. Sometimes it is necessary to clean up because in some layers outdated information might accumulate. It helps to create a specific **role for this task** and to ensure that someone takes over this role with end-to-end responsibility. Of course, this role can also rotate in team.

Get back to beginning

D	Work environment
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12	IT Tools to improve collaboration	Link
<p>The following questions can be answered by reading this HTG:</p> <p>Agile aspiration – which design criteria are crucial to consider?</p> <ol style="list-style-type: none"> 1. What are the major shifts? 2. For which use cases can collaborative IT tools be employed? 		Click
<p>DT-relevance – which implications does this have on DT?</p> <ol style="list-style-type: none"> 3. What IT tools are established at DT and relevant for the defined use cases? 4. How to select the appropriate IT Tool/s? 5. Digital@Work Toolbox (<i>Appendix</i>) 6. Deep-Dive: collaborative IT-tools for distributed teams (<i>Appendix</i>) 		Click
<p>Additional information: Where can I learn more about the topic and whom to contact?</p>		Click

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HOW TO

CHOOSE THE RIGHT IT TOOLS TO IMPROVE DIGITAL COLLABORATION?

In this document we first describe the aspiration for agile businesses, then we establish the DT context. Note: a situational analysis is required to assess the applicability of the elements described in this guide to a specific business area.

This how-to-guide is particularly relevant for:

Target picture \ Target group	Business/org. unit leaders	HRBP	Leaders	Employees
Applying agile ways of working			✓	✓
Targeting a full agile operating model	✓	✓	✓	✓

1. Introduction

Why is it important?

Co-operating efficiently across the boundaries of departments, sites, and functions is essential for an agile organization in an increasingly dynamic market environment. Digital tools for distributed agile collaboration are therefore increasingly relevant. The collaborative IT tools included in this how-to-guide are especially addressing the needs of distributed teams to help improve collaboration.

In addition, adequate training of employees and regular communication regarding new tools and functions are as essential for working efficiently with new tools as the role modelling of digital collaboration by management.

What do we want to achieve?

Note: The current version of this how-to-guide should not be considered as a comprehensive list of available digital tools - further tools, their application as well as use cases will be described in subsequent versions.

Agile aspires to achieve selected shifts in the context of collaborative IT tools.

From	To
Presence culture i.e., individuals are often unable to join their team at different locations and thus daily presence at the workplace with the team is required	Digital collaboration that can increasingly take a digital form, a daily presence at the workplace is often no longer required. Work can be shifted to alternative locations
Individuals as knowledge carriers, i.e., the focusing of expertise and the hoarding of information reinforces hierarchies and image cultivation	Crowd as knowledge carriers, i.e., using the crowd as a knowledge carrier makes information freely accessible and promotes collaboration
Inefficient ways-of-working with decentralized and distributed data, i.e., e-mail and computer-based document deposition, lead to individual knowledge carriers; the distribution of information to others is incumbent upon individuals; E-Mail ping-pong with documents to review hinders efficient collaboration	Real-time collaboration and co-creation with single source of data i.e., documents are freely accessible to all relevant persons, all those within a team/area can have the same level of knowledge. Teams can work on documents synchronously, enabling them to act faster and more efficiently

Note: The "From" dimensions serve an illustrative purpose and do not necessarily reflect the current DT reality.

2. How to get there?





For which use cases can collaborative IT tools be employed?





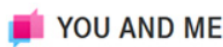
The following table exhibits typical use cases of the collaborative IT tools presented later in this how-to-guide.

Use cases		Importance for agile ¹
Transparency of information	Information, documents, and decisions made by a team can be rendered visible and accessible to all, at all times.	Must-have
Task allocation and tracking	Team can create transparency on backlog (and ideas), allocate tasks (and resources), and track their progress to optimize the flow of work, e.g., for product or agile software development.	Must-have
Knowledge sharing	Platforms such as our intranet, YAM, enable knowledge sharing and crowdsourcing, i.e., quickly tapping into the knowledge of many.	Must-have
Effective and efficient collaboration	Teams can work on documents synchronously. This helps to avoid a lack of clarity, for example through different document versions, and enables colleagues to act faster and more efficiently.	Good-to-have
Mobile presence	Dispersed teams can run effective virtual meetings, incl. sharing live presentations, collecting live comments.	Good-to-have
	Dispersed teams can have intimate discussions, e.g., via telepresence that recreates the experience of all participants being in the same room.	Good-to-have

¹ Must-have: essential pillar of agile operating model; Good-to-have: additional enabler of agile operating model

What IT tools are established at DT and relevant for the defined use cases?

Name of IT application	Description	Elements	Primary use case
Jabber 	Multifunctional platform for 1:1 networking and communication with (administrated) colleagues independently of their location, as well as enabling intra-group communication.	<ul style="list-style-type: none"> - Intensive interaction (chat, telephone) instead of e-mail - Ad hoc screen exchange (simultaneous working; problem solving) 	Mobile presence
Jira 	Task allocation, tracking and project management tool.	<ul style="list-style-type: none"> - Continuous task and resource allocation - Contains a Kanban and Scrum board by default - Overview on project information and personal tasks, status and backlog on desk and on mobile device - More applicable for complex tasks than YAM (e.g., for task sub-structure) - Task linkage with myWiki possible 	Task allocation and tracking
Modern Groups  Note: in Germany collaboration features from Office 365 are only applicable nationally and with DT-internal colleagues	Cloud based SharePoint Online platform that provides a shared workspace for team members. It provides options to create and store documents, as well as shared email.	<ul style="list-style-type: none"> - Uniform document filing - Synchronous work on documents - Access of documents/ presentations for relevant individuals - Organization of meetings - Basis for further Office 365 applications and mobile use (Office365 apps) - Use of confidential data possible 	Effective and efficient collaboration
One Note 	Note pad that can be made accessible to multiple employees. Enables work on documents (notes) synchronously and simultaneously, teams can communicate digitally and share their knowledge and ideas with others.	<ul style="list-style-type: none"> - Preparation and evaluation of meetings - Recording of notes and ideas - Simultaneous processing of sketches and ideas 	Effective and efficient collaboration

<p>Share Point International</p>  <p>Note: works also internationally and with external partners</p>	<p>Cloud-based team drive for simplified document filing and effective and efficient virtual collaboration.</p> <p>Telekom Kanban and other applications can be integrated.</p>	<ul style="list-style-type: none"> - Content management in protected spaces (i.e., with relevant individuals, incl. external stakeholders) - Documents can be stored, downloaded and edited, then uploaded for continued sharing - Organization of meetings, work flows, and more 	Transparency of information
<p>Telekom Kanban</p> 	<p>SharePoint-based add-on that creates transparency regarding information and tasks by visualizing tasks on a Kanban board, with all options offered by a SharePoint task list.</p> <p>https://share.zspi.telekom.de/sites/kanban</p>	<ul style="list-style-type: none"> - Transparency by rendering tasks visible and making them accessible to all, at all times - Visualization of Kanban boards, incl. task ownership, progress, and backlog - Individual or project-based task management 	Task allocation and tracking
<p>Telekom MyWiki</p> 	<p>Tool for effective and efficient collaboration on complex projects and developing themes and solutions in groups.</p>	<ul style="list-style-type: none"> - Knowledge sharing for teams and areas - Documentation in standardized structures 	Knowledge sharing
<p>Webex</p> 	<p>Online video and telepresence system for group-wide (also external) interaction. Limited to 500 participants, intended for real-time mobile presence communication (audiovisual, presentations etc.)</p>	<ul style="list-style-type: none"> - Enable teams to collaborate independently of their location - Ad hoc meetings - Conferences with up to 500 participants - Regular meetings 	Mobile presence
<p>YAM</p> 	<p>Social intranet and news platform for all issues relating to employees, projects, internal and external news, the establishment of project pages and teams, and much more. Projects and information can be processed graphically as a landing page and shared with colleagues throughout the company.</p>	<ul style="list-style-type: none"> - Source of information regarding, e.g., current market developments, projects, special interest themes - Surveys and interaction - Organization of events 	Knowledge sharing

How to select the appropriate IT Tool/s?

1. Identify which tools make sense for the team

The training of employees is a central factor in the use of IT tools. To find out what training is relevant for the teams/employees, one first needs to understand what tasks the teams/employees need to carry out regularly and which tools suit these tasks. In an agile environment, teams need to jointly agree on how they collaborate and therefore, which tools to use.

Here is a selection of questions that can help identify the tools required:

- Where is the team/ are the project colleagues located? Are they Telekom-internals AND located in Germany? (essential for collaboration on Office 365 & Modern Groups)
- Is the team frequently found in one place or does it work at different locations? Do many colleagues use home office? (e.g., Jabber, OneNote, SharePoint, Webex)
- Does the team manage complex projects with different internal stakeholders? (e.g., Modern Groups, my Wiki, OneNote, Telekom Kanban)
- Does the team often deal with external stakeholders who collaborate on the projects? (e.g., SharePoint, Trello⁶)
- Does the team have content that it makes sense to share with other teams at the company? (e.g., YAM)
- Are team members often on the move and required to do mobile work? (e.g., WebEx)
- Do team members often have to work on the same documents? (e.g., Office 365, SharePoint)

2. Train employees

IT tools and software can take very complex forms. Even though many applications can theoretically be operated intuitively, this by no means applies to all employees or for all functions. If teams have identified which tools make sense for them to use, they need to take a look at the HR suite or in YAM for suitable training and enabling measures. Further down in our how-to-guide one can find an overview of existing enabling measures for various tools. Some trainings include the use and combination of multiple tools.

3. Define a sensible SharePoint structure and appoint an owner

Structure: In any case it makes sense for the area and the team to establish a SharePoint at which all important documents can be filed in a manner visible to the entire team. To ensure that the folders and filing structure do not become lost in the data jungle, it is advisable to consider the following when establishing a meaningful folder structure: Are there different clusters or thematic areas in the team that the folders could be structured according to? Or does a project or customer-related structure make more sense? The structure should either be designated by a person who is highly familiar with the themes and area or alternatively specified in a small workshop to find a consensus between relevant theme owners.

Owner: Once the structure has been determined, there should also be an owner in the team or area who can establish the structure accordingly in the SharePoint, as well as generally taking care of the establishment and maintenance of the SharePoint. These include tasks such as the approval of folders for the team or for external persons or the use of further SharePoint functions. In addition, the person should also act in an advisory function for other team members with questions regarding SharePoint. In any case, the person should have a degree of technical affinity and enough time in their daily work routine to undertake maintenance and updating.

⁶ Trello is a platform to allocate tasks and track progress (similar to Jira). Usage on a voluntary basis and not for confidential data. Requires consideration of DRC guidelines for external tools.

4. **Appoint “tool ambassadors” to the team**

In addition to a person responsible for the SharePoint, there should also be further experts, or “tool ambassadors” in the team. These individuals should also have a degree of technical affinity and enjoy testing out new functions. “Tool ambassadors” act as contacts for other employees who require assistance in using the new tools or have questions regarding new functions. We recommend distinguishing between admin or tech applications and social media and collaboration tools in this. After all, someone who knows how to upload an article in YAM is not necessarily an expert in Office 365 or SharePoint.

If questions cannot be clarified within the team, there are also cross-group communities such as Dr. Tool-Fire (see next section), the Digital@Work Toolbox (see Appendix) or the IT Workplace Community (to be found in YAM) who are happy to help with questions regarding the tools.

5. **Setting an active example for the target state**

As is so often the case in life, when it comes to using IT tools the maxim “it’s only good if you use it” applies - and this concerns employees and leaders at all levels. Teams should align on which tools to use as it is required for all team members to adopt and use the same IT tools. Employees may only use tools intensively if all collaborators do the same. If some team members or leaders continue to insist on receiving all documents by email or even having them printed out for their meetings, then employees will find it difficult to carry out their tasks digitally. This means for all team members and leaders to also set meetings as WebEx or telepresence, organize meetings jointly with the team via Telekom Kanban boards or file documents on the joint SharePoint.

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3. Additional information

What relevant enabling formats exist in DT?

A key learning objective is to provide an introduction and step-by-step guidance for the application of digital tools to support more effective and efficient collaboration. These will soon be published on YAM.

Where can I learn more about this topic?

The following additional sources of information are helpful for understanding collaborative IT tools and their application.

NAME	BRIEF DESCRIPTION	LINK
ADVANCED SOCIAL TECHNOLOGIES AND THE FUTURE OF COLLABORATION	McKinsey Global Institute survey reveals how social technologies transform the way people work with each other, e.g., in an agile context	https://www.mckinsey.com/business-functions/digital-mckinsey/our-insights/advanced-social-technologies-and-the-future-of-collaboration
HOW SOCIAL TOOLS CAN RESHAPE THE ORGANIZATION	McKinsey article on the increasing relevance of collaborative tools and the potential these tools bring along for organizations	https://www.mckinsey.com/business-functions/digital-mckinsey/our-insights/how-social-tools-can-reshape-the-organization
TELEKOM TOOLBOX	Tips, tricks, trainings and application assistance for collaboration tools	TOOLBOX

Contact

Digital@Work Team: <https://yam.telekom.de/groups/digitalisierung>

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Appendix

a) Digital@Work Toolbox

Digital@Work Toolbox	Serves as central gateway for digital collaboration tools. Focuses on detailed information on DT collaboration tools (e.g., what can I use SharePoint for, how is Office 365 built up, where can I find help for WebEx) as well as linkages to collaboration trainings as well as further useful instruments that are pursuing the digital collaboration at DT.
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b) Deep Dive: Collaborative tools for distributed teams

The following table exhibits tools that particularly support agilely distributed teams.

Name	Major use case			Link
	Collaboration	Development	Telepresence	
CISCO VIDEO CONFERENCING			✓	https://www.cisco.com/c/en/us/solutions/collaboration/video-collaboration/index.html
CISCO WEBEX	✓			https://www.webex.co.uk/
JIRA		✓		https://www.atlassian.com/software/jira
MICROSOFT VISUAL STUDIO		✓		https://visualstudio.microsoft.com/
POLYCOM VIDEO CONFERENCING			✓	http://www.polycom.co.uk/
SLACK	✓			https://slack.com/
TRELLO	✓			https://trello.com/

Note: The introduced tools are not exhaustive and serve as an overview on common tools. External tools underly the DRC-guidelines of external tool usage.

AGILE PIONEERS ARE INVESTING SIGNIFICANTLY TO MAKE THE TRIBE SPACES ENJOYABLE

Tactical elements are in place to support Agile elements of team work



- Portable whiteboards and dry-erase markers to use in problem solving



- Necessary IT tools (internet, network and access to databases, etc.)



- Agile infrastructure and tools set-up (access to Jira or backlog tool, etc.)



- Camera to take and mount photos throughout the lab



- Supplies for boards: Brown paper, sticky tack, duct tape, white correction tape, post-its (various sizes and colors) and black markers



- "Avatars" (small paper figures) for resource allocation on tasks for work stream boards

Fun elements support a fun and creative culture that fosters out-of-the-box thinking



- Cool fridge with sodas



- A steady supply of snacks



- Recreational areas (e.g., bean bags)



- Games and nerf guns



- Theme-based items



- Crazy stuff (e.g., smoke machine, 3D printer)



LIFE IS FOR SHARING.

3

HR - PEOPLE BUSINESS

HR DIGITAL & INNOVATION / HRM-ORG

EXAMPLE: STRATEGIC CO-LOCATION OF CRITICAL ROLES AS A KEY SUCCESS FACTORS OF SQUAD

BANK EXAMPLE

Physical Backlog for one of the workflow squads helps team visualize work to be done



Adjacent desks enables squads to be located within close proximity



LIFE IS FOR SHARING.

Get back to beginning

E	Way of working
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13	Agile methods and frameworks	Link
<p>The following questions can be answered by reading this HTG:</p> <p>Agile aspiration – which design criteria are crucial to consider?</p> <ol style="list-style-type: none"> 1. What are the major shifts? 2. What are the critical steps in the development process of products/services or businesses in which methods and frameworks are to be used? 3. Which aspects have to be considered when selecting methods and frameworks? 4. What methods/frameworks should be used in the respective business/product development step? 		Click
<p>Best-practice – from whom can DT learn?</p> <ol style="list-style-type: none"> 5. Illustrations (<i>Appendix</i>) <ul style="list-style-type: none"> - Lean start-up - Design Thinking Process - Scrum-process - Kanban board 		Click
<p>Additional information: Where can I learn more about the topic and whom to contact?</p>		Click

14	Scaling	Link
<p>The following questions can be answered by reading this HTG:</p> <p>Agile aspiration – which design criteria are crucial to consider?</p> <ol style="list-style-type: none"> 1. What are the major shifts? 2. What are the key functions of an agile scaling framework? 3. Which common agile scaling frameworks exist and what are their main features? 4. How to scale-up agile in a company-specific approach? 		Click
<p>DT-relevance – which implications does this have on DT?</p> <ol style="list-style-type: none"> 5. What does the current reality at DT look like? i.e., Task – Scale-up framework developed by Deutsche Telekom IT 		Click
<p>Additional information: Where can I learn more about the topic and whom to contact?</p>		Click

15	Agile Meetings	Link
The following questions can be answered by reading this HTG:		Click
Agile aspiration – which design criteria are crucial to consider?		
1. What are the major shifts?		
2. What are the different types of agile meetings?		
3. How are the respective meetings structured?		
4. How to determine the appropriate structure of meetings?		
Additional information: Where can I learn more about the topic and whom to contact?		Click

16	DevOps	Link
The following questions can be answered by reading this HTG:		Click
Agile aspiration – which design criteria are crucial to consider?		
1. What are the major shifts?		
2. Why to rely on DevOps?		
3. How to implement DevOps?		
4. What capabilities facilitate DevOps?		
5. What are the key success factors to establish DevOps?		
Additional information: Where can I learn more about the topic and whom to contact?		Click

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Next HTG for agile ways of working

Next HTG for agile operating model

WAY OF WORKING



HOW TO CHOOSE THE RIGHT AGILE METHODS AND FRAMEWORKS?

In this document we first describe the aspiration for agile businesses, then we establish the DT context. Note: a situational analysis is required to assess the applicability of the elements described in this guide to a specific business area.

This how-to-guide is particularly relevant for:

Target picture \ Target group	Business/org. unit leaders	HRBP	Leaders	Employees
Applying agile ways of working			✓	✓
Targeting a full agile operating model	✓	✓	✓	✓

1. Introduction

Why is it important?

The need to move towards agile also requires Deutsche Telekom to think about how to introduce agile methods and frameworks.⁷ This is essential as agile methods and frameworks provide opportunities to assess the direction of a project throughout the development lifecycle and to react quickly to changing conditions and customer requirements. Thus, agile methods and frameworks are customer centric and based on adaptive planning, evolutionary development, early delivery, and continuous improvement, which in turn encourage rapid and flexible response to change.

⁷ „Methods“: specific tools; „Frameworks“: schools of thought

What do we want to achieve?

This how-to-guide aims to provide guidance on which agile methods and frameworks exist and what methods and/or frameworks should be used in the respective business/product development step. However, in general, those methods and frameworks can be applied throughout the entire development process and can also complement each other well.

Agile aspires to achieve selected shifts in the context of agile methods and frameworks.

From	To
A high focus on technology development without sufficient consideration of client needs	Agile methods that foster client orientation by involving clients in the development decisions throughout the process
Feedback collection from the client only at the end of the development phase	Methods that iteratively improve the product by collecting feedback from the client on a continuous basis–this reduces time to market
Business requirements that are fixed and documented upfront based on input from stakeholders	(Intuitive) use cases/prototypes that are continuously adjusted according to collected feedback from customers/end users
Insisting on one solution that must be successful since many resources have already been invested into it	A mindset that accepts failure to learn and adjust quickly

Note: The "From" dimensions serve for an illustrative purpose and do not necessarily reflect the current DT reality.

2. How to get there?

What are the critical steps in the development process of products/services or businesses in which methods and frameworks are to be used?

When developing a product/service or business, there are three central steps to take:

1. **Problem and solution fit (desirability)** i.e., a desirable solution, one that the customer really needs). Explore customer needs and generate ideas and prototypes for the product, service, or process concept within the team.
2. **Business modeling/market development (viability)** i.e., a feasible solution, building on the strengths of the current operational capabilities). Develop a business model and create a customer base or market for the solution using an iterative experimentation-driven approach to mitigate risks.
3. **Agile product development and implementation (feasibility)** i.e., a profitable solution, with a sustainable business model). Teams develop products or businesses in an iterative incremental method while continuously considering and implementing customer feedback throughout the process.

Which aspects have to be considered when selecting methods and frameworks?

Deutsche Telekom could rely on several different well-established methods and frameworks. The use of the respective method and framework always depends on the stage in the product/solution development process i.e., certain methods and frameworks are particularly suitable to certain stages in the development process. However, in general, those methods and frameworks can be applied throughout the entire development process and can also complement each other well.

When starting to work with methods and frameworks, teams need to consider two essential things: first, teams must jointly align on the applied method and framework as a team for the respective development process that they will use to ensure team effectiveness and process stability. We consider this a “must-have”, i.e., an essential pillar of an agile operating model. Second, teams should continuously reflect on the applied method and/or framework and adjust it to their needs with the objective of increasing their effectiveness.

What methods/frameworks should be used in the respective business/product development step?

1. In the problem and solution fit stage, teams can rely on a framework called **design thinking**. Design thinking provides a framework for iterative approaches to problem solving and idea generation. The objective of design thinking is to solve problems from the perspective of a user. Therefore, teams seek out people with different perspectives, knowledge, skills, and experience and have them work together to create a practical solution for a real-world problem (continuously repeat and iterate as needed). To do so, the design-thinking process is structured into three main phases: first, it is about truly understanding the problem, before, second, the team working towards a concrete solution for the identified problem. Third, it is about realizing the solution, which means actually implementing it. This way of thinking can be applied to products, services, and processes—anything that needs to be improved (e.g., for optimization of products, development of new ideas or for driving change) (see appendix for a detailed depiction of the design-thinking process).

2. In the business modeling and market development stage, teams can rely on the guiding principles of **lean start-up** to develop businesses and products and bring them to the market as quickly as possible. The aim is to shorten the product development cycles by adopting a combination of iterative business-hypothesis-driven experimentation and validation with the product's target group. This helps draw conclusions from the user's feedback at an early stage in the development process and adjust the development process accordingly. To do so, there are three guiding principles of lean start-up: first, build (i.e., build a prototype); second, measure (i.e., collect feedback from the product's target group); and third, learn (i.e., validate hypothesis and adjust), all phases guided towards improve or develop (new) products/services.
3. In the agile product development and implementation stage, teams can, among other less common methods, rely on **Scrum or Kanban**. Both methods provide teams with three things: first, they help teams break down large and complex tasks for incremental execution. Second, they place high value on continual improvement and optimization. Third, they focus on high visibility of work flows by making project execution transparent.

With Scrum, teams are typically aligned on delivering a single product, and requirements remain stable for the sprint time box. This means that priorities are locked in for the duration of the sprint and teams can deliver a cohesive unit of work every sprint with a predefined outcome/deliverable. This particularly helps teams develop a customer-facing solution with the need to incorporate regular feedback. This, in turn, increases transparency of the progress and offers the possibility to evaluate the functionalities after every sprint and adjust and prioritize accordingly (e.g., suitable for the development of a software or specific product).

In contrast to Scrum, Kanban allows for priorities to be reevaluated as needed if they do not have a "work-in-progress" status, and teams may deliver multiple units of work on a continuous basis. Kanban is a good method for teams handling daily customer service requests where priorities may change on a regular basis (e.g., in sales or marketing) (see appendix for a detailed depiction of Scrum and Kanban).

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3. Additional Information

What relevant enabling formats do we have in DT?

A key learning objective is to provide an introduction and step-by-step guidance for the set up and implementation of agile methods and frameworks. The respective enabling formats are soon to be published on YAM. Particularly, consider the rich collection of enablers on the different methods and frameworks.

Where can I learn more about the topic?

The following additional sources of information are helpful in introducing agile methods/frameworks and ways of agile working in a team:

NAME	BRIEF DESCRIPTION	LINK
BUILDING A DESIGN-DRIVEN CULTURE	It's not enough to just sell a product or service—companies must truly engage with their customers.	https://www.mckinsey.com/business-functions/marketing-and-sales/our-insights/building-a-design-driven-culture
EFFECTIVELY SHIFTING GEARS BETWEEN THE DIFFERENT PHASES OF THE INNOVATION PIPELINE	One of the challenges is to know which tools to use, at what moment, and when to switch from one phase to the next.	https://www.linkedin.com/pulse/effectively-shifting-gears-between-different-phases-pipeline-pinder
INSPIRATION VIDEO	Building the plane while flying	https://www.youtube.com/watch?v=L2zqTYgcpg
I60 VIDEO-SERIES	Different videos in HR Suite e.g., Scrum/Kanban/Agile	https://yam.telekom.de/groups/vertical-trainings-t-systems/blog/2018/01/23/450-i60-videos-jetzt-in-der-hr-suite-zum-abruf-bereit-hr-suite-now-offers-around-450-i60-videos
LEAN START-UP	An overview of different methods, articles and tools on the Lean Start-up approach	https://medium.com/we-are-builders/a-curved-list-of-customer-development-resources-40-a967c238729b
SCRUM ALLIANCE	Scrum Alliance is the largest, most established and influential professional membership and certification organization in the agile community.	https://www.scrumalliance.org/
TELEKOM KANBAN/SCRUM BOARD	A Kanban board (DT own development)	https://yam.telekom.de/groups/telekom-kanbanscrum-board
THE POWER OF DESIGN THINKING	Infusing your organization with a design-driven culture that puts the customer first may provide not only real, measurable results but also a distinct competitive advantage.	https://www.mckinsey.com/business-functions/digital-mckinsey/our-insights/the-power-of-design-thinking

Contact

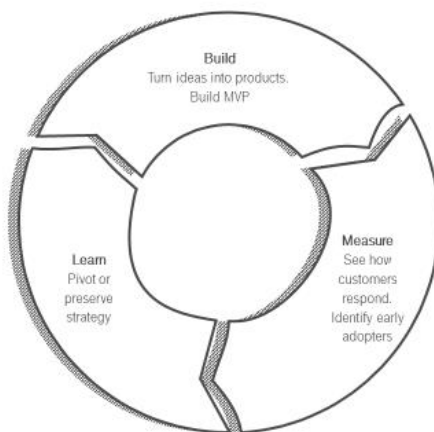
Design Academy Team: design-academy@telekom.de

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Appendix

LEAN START-UP



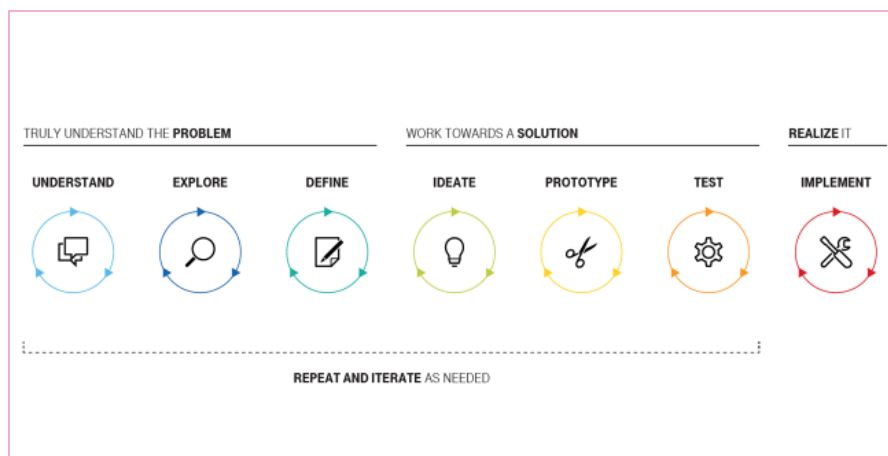
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DESIGN THINKING PROCESS



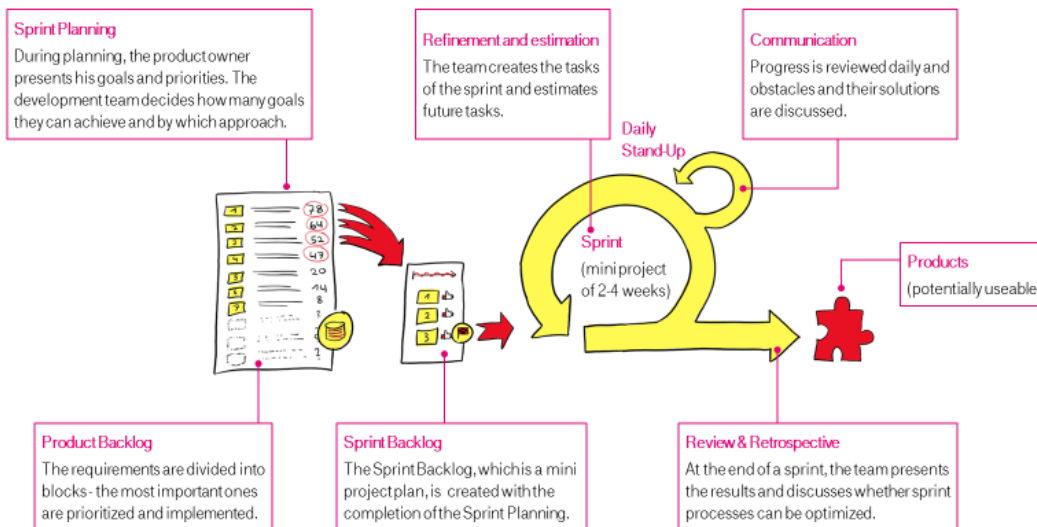
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THE SCRUM PROCESS



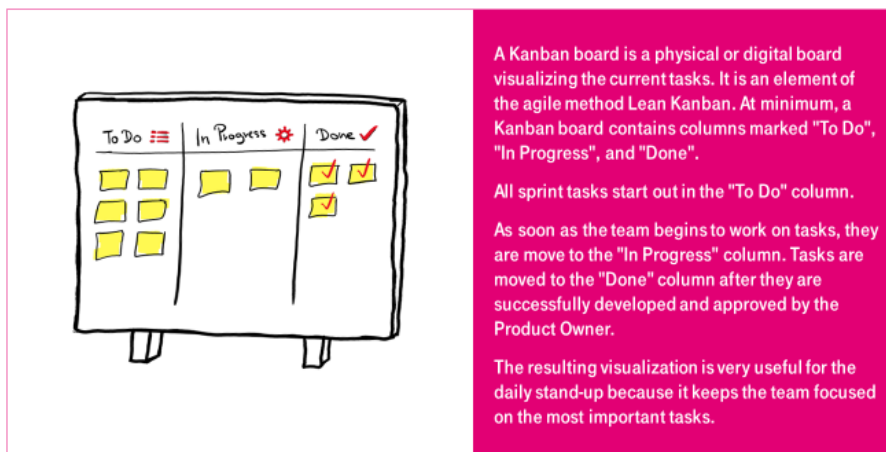
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KANBAN BOARD



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05.08.2018

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Next HTG for agile operating model

WAY OF WORKING



HOW TO SCALE AGILE?

In this document we first describe the aspiration for agile businesses, then we establish the DT context. Note: a situational analysis is required to assess the applicability of the elements described in this guide to a specific business area.

This how-to-guide is particularly relevant for:

Target picture \ Target group	Business/org. unit leaders	HRBP	Leaders	Employees
Applying agile ways of working	This how-to-guide solely assumes a full agile operating model as target image			
Targeting a full agile operating model	✓	✓	✓	✓

1. Introduction

Why is it important?

After the agile target picture has been defined and the first pilots have been successfully implemented, the focus shifts to scaling agile throughout the organization. Given the complex decision-making mechanisms, overlapping dependencies, large number of teams, and overall need for transparency, a structured scaling approach is needed. Publicity around the increasing number of standardized agile scaling frameworks might entice organizations to rely on such a standardized scaling solution. However, because applying a standardized scaling framework without adjustments has various drawbacks, this how-to-guide instead emphasizes the significance of finding a company-specific scaling approach.

What do we want to achieve?

This how-to-guide describes which approaches enterprises might choose when scaling agile and which measures are relevant for identifying company-specific procedures to drive agile in the desired areas of the organization.

Agile aspires to achieve selected shifts in the context of scaling.

From	To
Agile islands: selected teams are already working agilely but do not coordinate with other agile teams	Coordinated agile teams: agile teams work together in a collaborative manner towards a common vision/strategy (e.g., focus on alignment: highly interconnected agile teams)
Teams are already working agilely while tactical and strategic planning is not agile	Organizationwide scale-up of agile covering operational and strategic perspectives
Uncoordinated parallel existence of agile and non-agile parts of the organization	Clear governance defining the interaction, collaboration, roles, and responsibilities of agile and nonagile parts of the organization (<i>see how-to-guide "interfaces between agile and traditional parts of the organization"</i>)

Note: The "From" dimensions serve an illustrative purpose and do not necessarily reflect the current DT reality.

2. How to get there

What are the key functions of an agile scaling framework?

Considering the key functions of an agile scaling framework, essential pillars (must have) and additional enablers (nice to have) need to be differentiated.

Key functions of agile scaling frameworks and their importance for agile ¹
Enabling a joint vision, strategy, and understanding (“why”) through well-coordinated teams to enable an all-encompassing agile transformation	Must have
Covering both operational and strategic perspectives	Must have
Supporting the interaction both within agile (e.g., between squads and tribes) as well as outside agile (e.g., between agile and nonagile parts of the organization)	Must have
Respecting the unique requirements of each unit and organization through tailored solutions instead of trying to set a prescriptive way of carrying out agile	Must have
Establishing shared stable backbone processes to remove and prevent redundancies, e.g., through uniform steering or HR processes	Must have
Fostering compatible ways of working and utilization of identical tools	Nice to have
¹ Must have: essential pillar of agile operating model; nice to have: additional enabler of agile operating model	

Which common agile scaling frameworks exist and what are their main features?

The most common agile scaling frameworks are the Disciplined Agile Delivery (DAD), Large Scale Scrum (LeSS), Scaled Agile Framework (SAFe), and Scrum of Scrums (SoS). As there are a growing number of frameworks and experiences, choosing the right approach is increasingly challenging for organizations, especially as there is no rule for which framework to use or which framework is always preferred. When scaling, a mutual understanding throughout the organization is fundamental; nevertheless, companies could employ multiple scaling frameworks if there are a few touchpoints and dependencies between parts of the enterprise allowing for agile (i.e., decentralized decision making).

The following tables provide an overview of the most common agile scaling frameworks (see appendix for further details).

DAD (Disciplined Agile Delivery)

Description	<p>A people-first approach to agile delivery that emphasizes roles over processes in scaling agilely</p> <p>Modifies Scrum by adding several other agile/lean methods (e.g., Kanban, lean) to fill process gaps ignored by Scrum (e.g., DAD addresses all aspects of agile, not just management and collaboration; DAD supports a full delivery lifecycle, including inception and transition, not just construction)</p> <p>Focuses on architecture, design, and DevOps, especially risk reduction</p>
Typical use case	For both small, co-located and large, distributed teams in large-scale enterprises
Pros	<p>Focuses on people rather than processes</p> <p>Respects existing organizational goals and values</p> <p>Hybrid choice of four delivery models (agile/basic, lean/advanced, continuous delivery, and exploratory) provides flexibility and adaptation potential</p>
Cons	<p>Finding coaching resources may be difficult as it is less common than LeSS or SAFe</p> <p>Provides limited guidance on implementation/organizational transformation (“how”)</p>

LeSS (Large Scale Scrum)

Description	<p>Equal to regular Scrum, but applied to large-scale development (including additional rules and tips for large multiteam, multisite, and offshore agile development initiatives)</p> <p>Aims to significantly reduce bureaucracy and provides a mutually consistent set of practices based on Scrum</p> <p>Provides guidance on target state for most operating model shifts</p> <p>Encourages direct communication between teams and product owners</p> <p>Coordinates teams through sprint planning meetings and potential further meetings</p>
Typical use case	Small- to mid-scale and quickly evolving organizations aspiring to scale Scrum with a high degree of flexibility
Pros	<p>Relatively higher flexibility (easy to customize) and lower costs</p> <p>Very intuitive for Scrum applicants</p>
Cons	<p>Not as useful if not using Scrum already</p> <p>Provides little input on transformation journey itself (flexible, but not prescriptive/structured)</p> <p>Rather unstructured approach makes it unsuitable for larger organizations</p>

SAFe (Scaled Agile Framework)

Description	<p>Aims to optimize existing organization to enable agile and relies on the creation of lean agile programs</p> <p>Takes an economic view by employing costs, value, and risk as decision making mechanisms</p> <p>Provides guidance on target state for most operating model shifts while being highly prescriptive and drawing a very detailed and clear image of the transformation journey</p> <p>Focuses on alignment, transparency, and execution</p>
Typical use case	<p>Focus on large-scale enterprises facilitating the coordination across teams through centralization and standardized processes</p>
Pros	<p>Good product development principles; clear roles and responsibilities</p> <p>Involves all levels of the organization; promotes team collaboration</p> <p>Good market traction and case studies</p> <p>Respects existing organizational goals and values</p>
Cons	<p>Can be too prescriptive and lacks flexibility</p> <p>Potentially higher overhead and costs due to additional governance layers</p>

Scrum of Scrums (SoS)

Description	<p>Enables coordination when multiple Scrum teams work together</p> <p>Fosters solving for interdependencies between the work and deliverables of different teams</p> <p>Encourages showcasing achievements and giving feedback to other teams</p> <p>Focuses on a collaborative way of working in teams</p> <p>Coordination and resolution happen mainly from the bottom up</p> <p>Regular SoS meetings with designated Scrum team ambassadors (Scrum Master or tech lead) and technical/program managers attending</p> <p>Ambassadors provide an overview of team status, road map, and how teamwork affects the work of other teams</p> <p>Frequency depends on level of Scrum teams' interdependencies</p>
Typical use case	<p>Best applicable if coordination of a few Scrum teams is intended (small-scale)</p>
Pros	<p>Simple to implement</p> <p>Focus on dependencies and resolution</p> <p>Lightweight approach with short meetings, no additional reporting, and no additional positions</p>
Cons	<p>Relatively undefined</p> <p>Limited ability to scale as it only provides an overview of the team level</p>

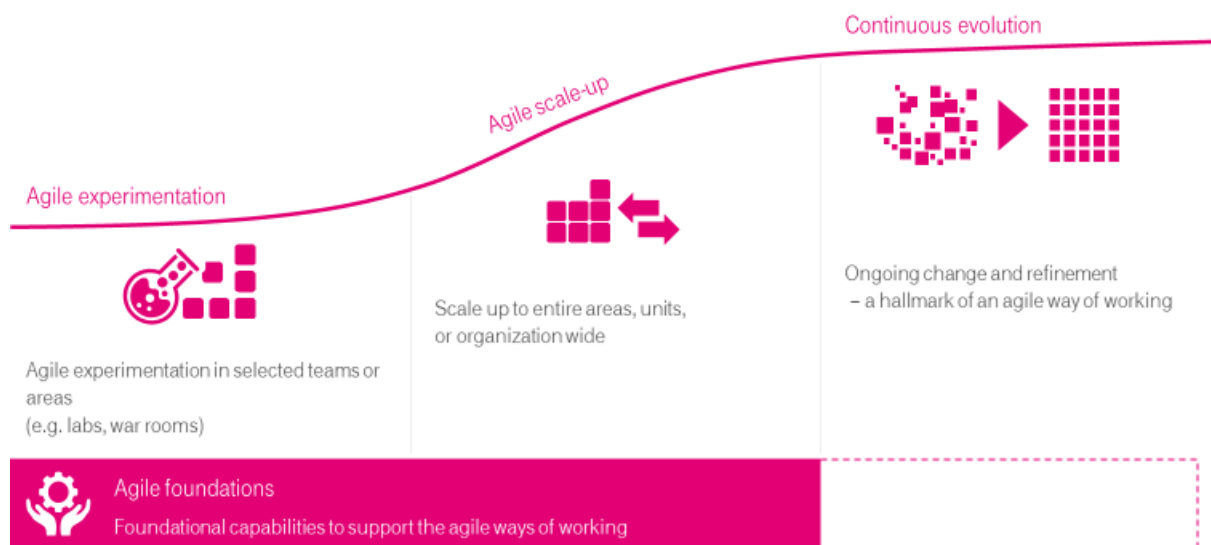
Standardized agile scaling frameworks are useful to scale agile by providing a well-documented playbook and broad road map but do not address many of the key components of agile transformations:

- Standardized frameworks might only initiate a “pseudo” agile transformation, instead of initiating an all-encompassing agile transformation because, when applying standardized scaling frameworks, organizations only learn the “how,” but do not understand the “why.”
- Potential abuse of standardized frameworks as an excuse to create occupations for “nondoers” (i.e., middle managers, business architects, project management office (PMO) to ensure consistency with the playbook.
- Standardized frameworks fuel the tendency of many organizations to try to set a clear, prescriptive way of working agilely, rather than critically evaluating and refining to take account of diversity in products, work, and environments.
- Standardized frameworks do not facilitate eliminating the existing boundaries between business and IT.

How to scale up agile in a company-specific approach?

Companies have diverse characteristics and starting points, so their scaling requirements are very specific and individual. The standardized frameworks introduced above are useful input and might serve as a starting point but need to be augmented to enable a truly agile setup. Organizations should try to adopt one company-specific framework for all relevant parts of the organization (because many elements are tied), while giving each unit the freedom to experiment and adjust its elements. A company-specific approach will help scaling by co-creating and involving leadership, management, and teams.

Moving towards a more agile setup typically involves three maturity levels.



LIFE IS FOR SHARING.

SOURCE: McKinsey

In order to scale up agile, the following steps need to be considered:

1. The entire value stream of the organization needs to be scrutinized at a very detailed level. This step includes describing the current practices relevant for scaling in the organization, i.e., understanding the current way of working, assessing the employed technology, and identifying other practices adopted within the organization. Additionally, identifying the current problems or challenges within the organization marks a crucial foundation for being capable of developing a truly tailored and effective approach. Following this, the agile target picture can be derived and defined in a collaborative approach by involving all relevant teams and individual employees.
2. The second step entails creating an agile playbook in all dimensions relevant for scaling agile. In the DT context, this translates into the six DT compass dimensions (see further “Agile Blueprint” how-to-guides). Reviewing the entire agile space for appropriate solutions within the compass dimensions can be fulfilled by borrowing valuable and suitable practices from the standardized agile scaling frameworks introduced above. The playbook itself should be developed in an agile, iterative way that allows for feedback loops, learning as well as quick and effective adaptations in the six DT compass dimensions Org design, Leadership and mindset, governance, work environment, Method and tools, and People. In addition, generating the required buy-in for all relevant organizational levels as well as guaranteeing the required capacity to scale is significantly important for preparing the scale-up of agile.

Depending on the scaling objectives as well as the time pressure to achieve the agile target picture, a tailored company-specific agile scale-up can be conducted in three different ways:

Big bang approach

Implementation of a new way of working for the entire organization in waves of one disruptive go. The organizational structure is altered to create stable and self-contained agile cells and the enterprise processes governing those teams are modified. The broad deployment of operating model changes to enable agile is rolled out to business units. The deployment of agile practices as well as a culture and mindset change is conducted at a cell level within the business units. A transformation office coordinates the companywide deployment. Applying the big bang approach is especially useful if the buy-in and commitment to agile is strong enough for the organization to accept risks and short-term disruption. Organizations scaling agile in a big bang approach need to ensure the proper functioning and implementation of the new operating model to prevent a prolonged disruption endangering the organization.

Lab approach

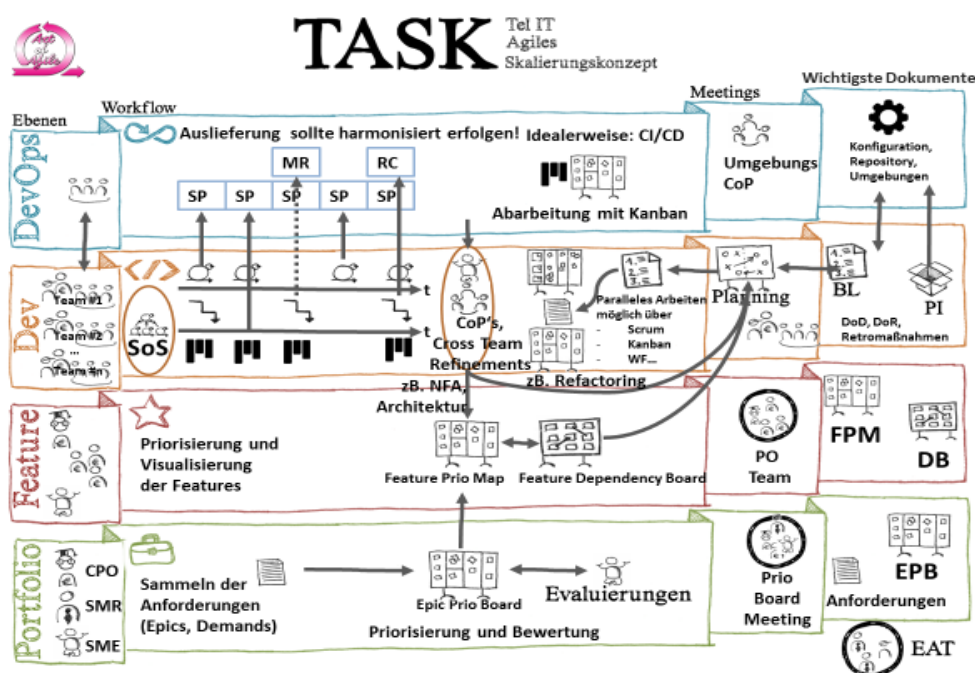
Initially, a small agile lab setup protected from the rest of the organization is established, thereby creating an ideal agile operating model to experiment with. The experiences are then employed to iteratively improve the operating model to build competences and codify good practices. The agile lab thus gradually grows to ultimately cover entire units or the whole organization. Applying the lab approach is especially useful if there is only an inadequate top-down support for scaling and if the complicated scaling processes endanger the operating activities of the organization. A clear focus on ultimately merging the lab with the traditional line organization is relevant to prevent the lab from remaining a separate and isolated experiment.

Spike-based approach

A clear focus on implementing agile practices at the team level using a wave approach covering two to three areas in each wave. Scaling agile practices as well as a culture and mindset change should be conducted at a cell level (vertical team level deployment) in consecutive batches of teams. The actual operating model changes to enable agile (e.g., new people processes, new enterprise architecture) need to happen at an enterprise level (horizontal enterprisewide deployment) in spikes in a more top-down manner in parallel to waves. Applying the spike-based approach is especially useful if the organization structure allows gradual changes and if the intense big bang approach is too risky or if there is a lack of commitment and buy-in for the agile transformation. When applying the spike-based approach, organizations need to especially watch out for potential disruptions of the operating activities due to the changes at the team and enterprise levels and prevent slow adoption due to the cautious nature of the spike-based approach.

What does the current reality at DT look like?

Currently, Tel IT is going through the process of developing a scaling approach – the TASK framework (Tel IT Agiles Skalierungskonzept). The framework was derived from the work and experience of the coaches of the ArtofAgile team as well as other teams already working agilely at Tel IT during the last seven years. TASK is based on Scrum and Kanban (see how-to-guide “Agile methods and frameworks”) and is most similar to SAFe; however, it contains elements and input from various other scaling frameworks. It has a stronger connection to agile principles than SAFe and contains additional elements, e.g., an Executive Action Team (EAT) responsible for specific steering activities. TASK is based on the assumption that it should not be predetermined which generic framework should be utilized for scaling agile. There is no final version of TASK, as the scaling approach will continuously evolve.



The existence of TASK demonstrates that there is no one-size-fits-all solution, i.e., no generic framework that can be applied without company-specific adjustments nor a generic companywide solution, but instead a variety of unit-specific approaches (such as TASK for Tel IT) that are compatible with the solutions employed at other units within the organization. Besides structuring and defining an appropriate tailored scaling approach, the decision on how to implement and actually scale (i.e., depending on scaling and time pressure objectives) will be highly relevant for further scaling efforts at DT.

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3. Additional information

What relevant enabling formats do we have at DT?

A key learning objective is to provide an introduction and step-by-step guide for the scaling process of agile and how to derive an appropriate company-specific method. These will soon be published on YAM.

Where can I learn more about this topic?

The following additional sources of information are helpful for understanding agile scaling:

NAME	BRIEF DESCRIPTION	LINK
AGILE SCALING AT TEL IT	Application of TASK and the corresponding scaling concept	https://yam.telekom.de/docs/DOC-461160 https://yam.telekom.de/docs/DOC-461159
AN OPERATING MODEL FOR COMPANY-WIDE AGILE DEVELOPMENT	McKinsey article on how companies must rethink foundational processes, structures, and relationships to scale up agile	https://www.mckinsey.com/business-functions/digital-mckinsey/our-insights/an-operating-model-for-company-wide-agile-development
GET AGILE FASTER THROUGH PILOT PROGRAMS	McKinsey article highlighting the relevance of a well-designed pilot program to initiate the scale-up of agile	https://www.mckinsey.com/business-functions/organization/our-insights/the-organization-blog/get-agile-faster-through-pilot-programs
HOW TO GO AGILE ENTERPRISE-WIDE: AN INTERVIEW WITH SCOTT RICHARDSON	McKinsey interview explaining why successfully scaling agile starts with a joint strategy that's consistent from the front lines to the C-suite	https://www.mckinsey.com/~/media/McKinsey/Business%20Functions/McKinsey%20Digital/Our%20Insights/How%20to%20go%20agile%20enterprise%20wide%20An%20interview%20with%20Scott%20Richardson/How-to-go-agile-enterprise-wide-an-interview.ashx
HOW TO MESS UP YOUR AGILE TRANSFORMATION IN SEVEN EASY (MIS)STEPS	McKinsey article on the relevance of having a joint vision and strategy as well as a reminder to not rigidly apply generic scaling frameworks	https://www.mckinsey.com/business-functions/organization/our-insights/how-to-mess-up-your-agile-transformation-in-seven-easy-missteps
MAGENTA BUSINESS	Digital factory agile playbook under the application of SAFe	https://yam.telekom.de/groups/magenta-business/blog/2018/05/09/magenta-business-das-agile-playbook
PI MEETING IN DARMSTADT	Video: two-day event on the concrete road map design until the end of the second quarter in the course of the TSI transformation (application of SAFe)	https://yam.telekom.de/groups/div-e-digital-innovation-for-value-and-efficiency-bso-bpm-tsi/blog

**SCALING UP
ORGANIZATIONAL
AGILITY**

McKinsey article on how to proceed with scaling up agile after having succeeded with a well-designed pilot program

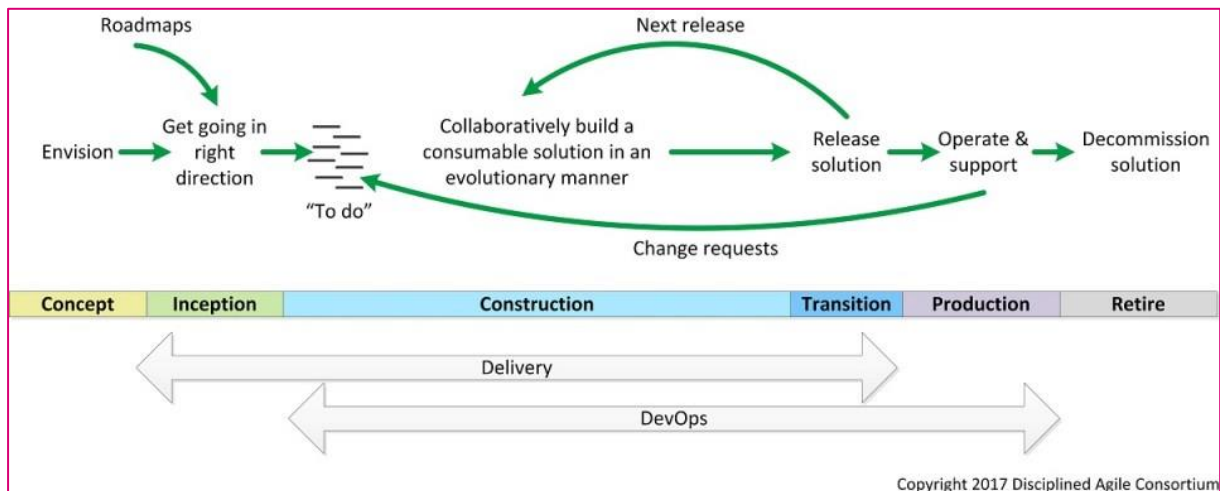
<https://www.mckinsey.com/business-functions/organization/our-insights/the-organization-blog/scaling-up-organizational-agility>

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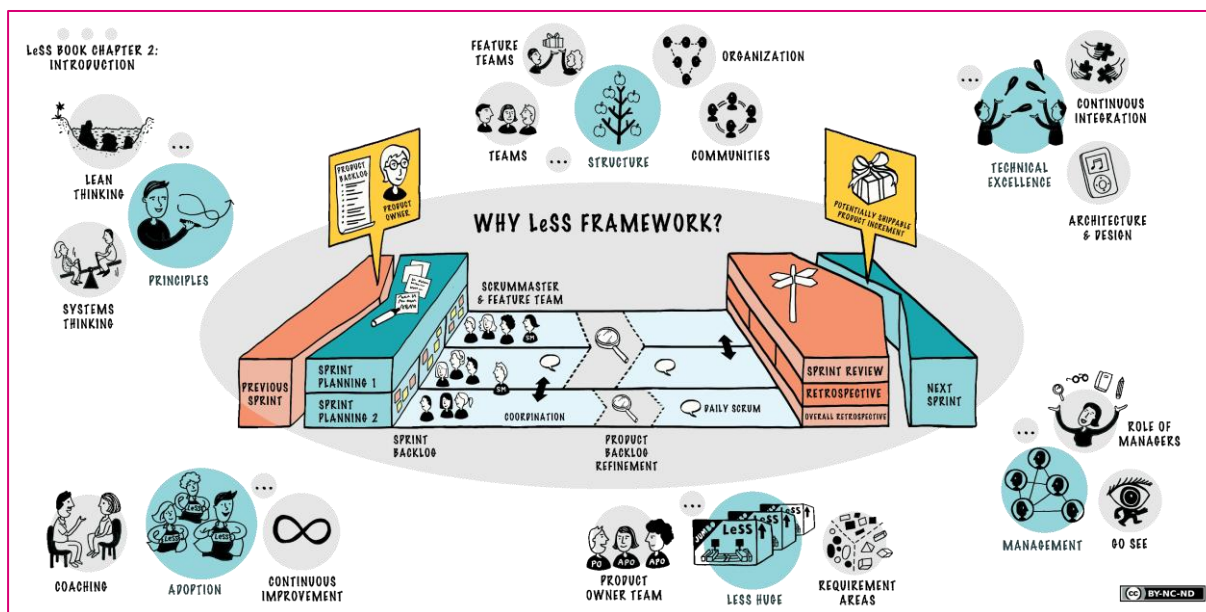
Appendix

The following figures illustrate the general idea of the standardized agile scaling frameworks introduced above.

DAD (Disciplined Agile Delivery)



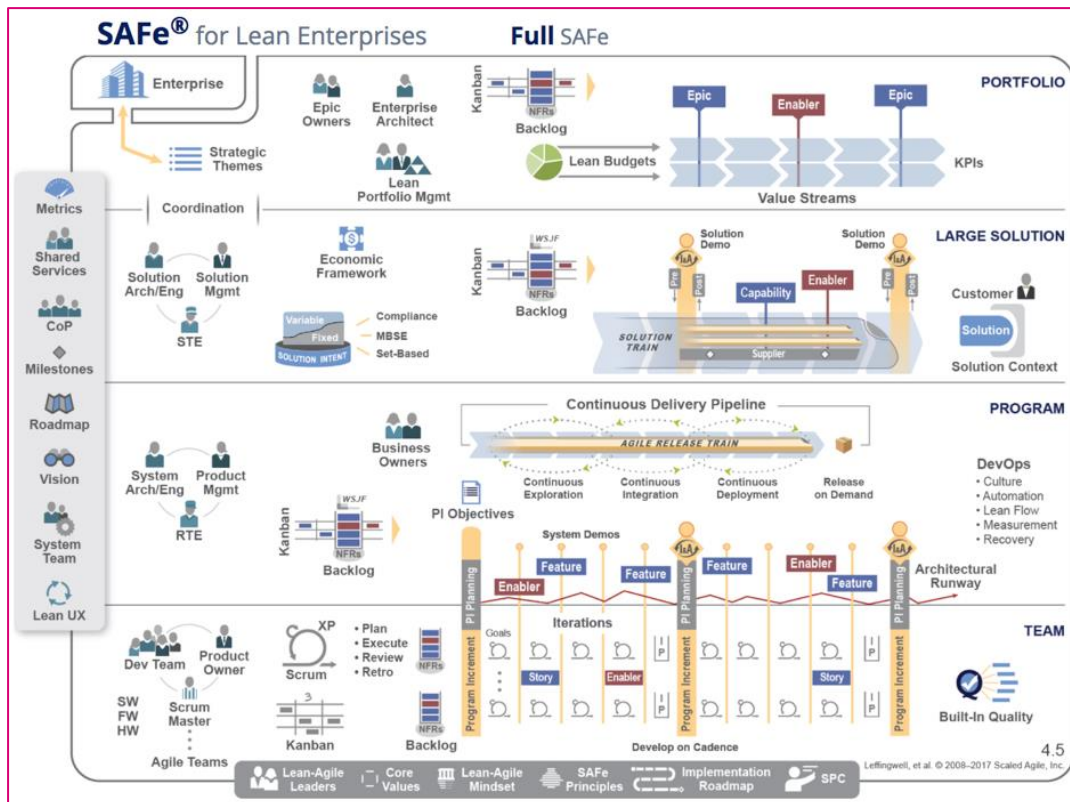
LeSS (Large Scale Scrum)



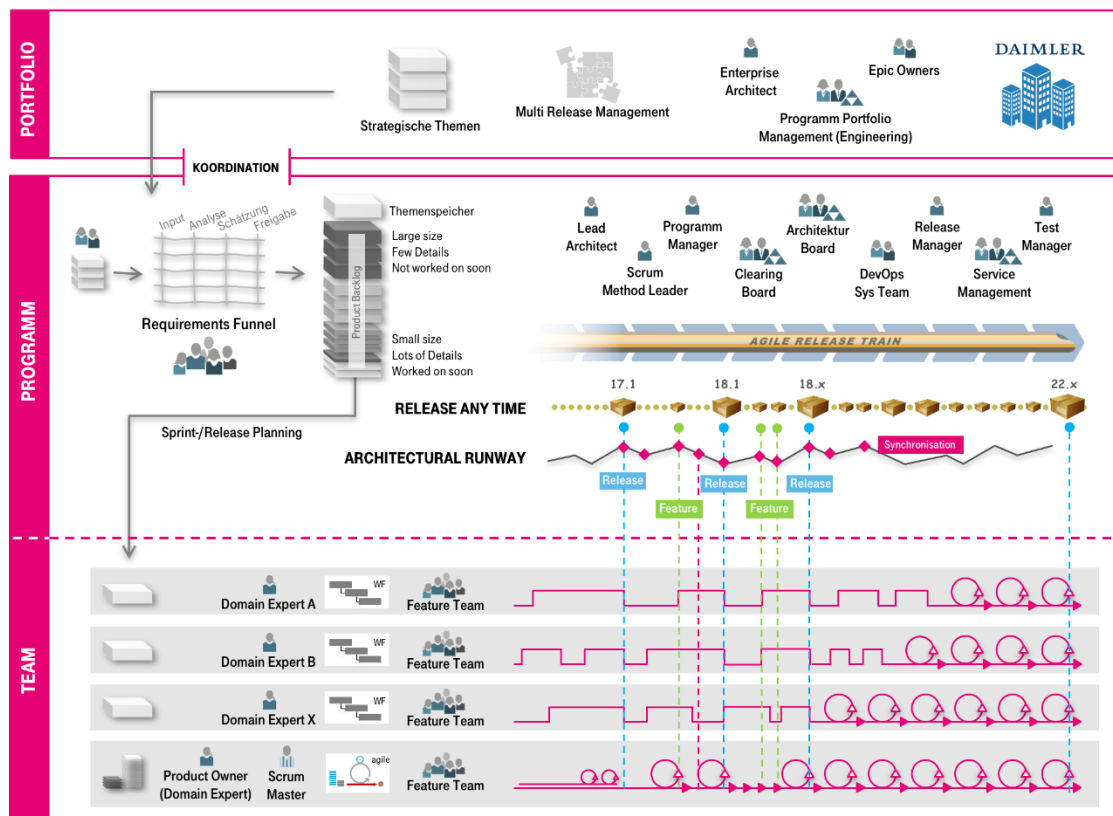


SAFe (Scaled Agile Framework)

General framework



SAFe adaption at TSI

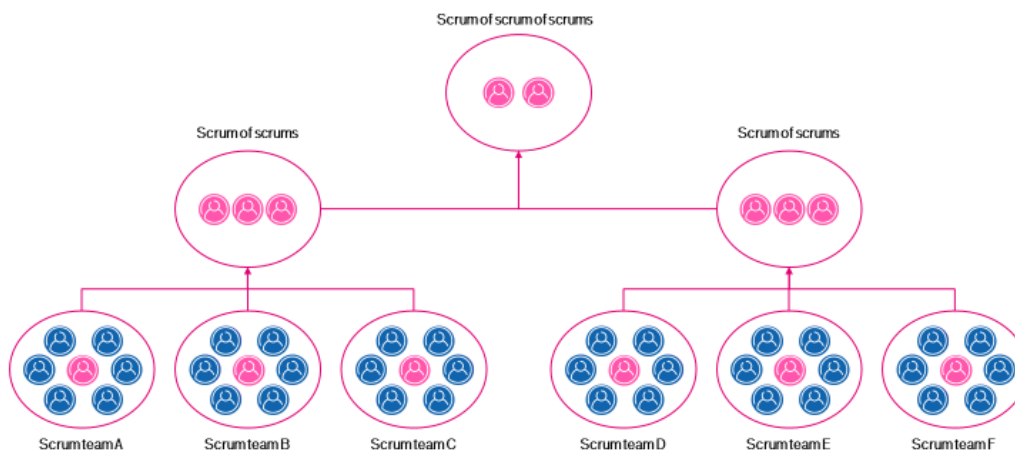


Scrum of Scrums (SoS)

HR - PEOPLE BUSINESS

HR DIGITAL & INNOVATION / HRM-ORG

SCRUM OF SCRUMS



LIFE IS FOR SHARING.

CONFIDENTIAL

5/7/2018

1

Get back to beginning



HOW TO SET UP MEETINGS FOR AGILE TEAMS?

In this document we first describe the aspiration for agile businesses, then we establish the DT context. Note: a situational analysis is required to assess the applicability of the elements described in this guide to a specific business area.

This how-to-guide is particularly relevant for:

Target picture \ Target group	Business/org. unit leaders	HRBP	Leaders	Employees
Applying agile ways of working			✓	✓
Targeting a full agile operating model	✓	✓	✓	✓

1. Introduction

Why is it important?

The need to move towards agile requires Deutsche Telekom (DT) to question the established meeting culture. It is essential to establish an agile meeting culture in which teams are aligned and work in an atmosphere of trust and collaboration. An effective agile meeting culture will help the teams at DT to increase productivity by enabling them to assess and act on issues quickly.

This document focuses on operational meetings linked to the team's daily activities. It does not cover meetings at the corporate level on issues such as strategy or regulatory requirements. Furthermore, this guide focuses mainly on meetings within the team. It does not describe other types of meetings, such as cross-team meetings or stakeholder alignment meetings (e.g., synchronizing squads via Scrum of Scrums) (*see how-to-guide "Scaling and working across distributed teams"*). Moreover, the meetings described in this guide focus on meetings after the team has been set up, i.e., teams might require additional, irregular meetings (e.g., for team kick-off).

While agile meetings are typically called "ceremonies" or "rituals" in the context of agile work, to avoid confusion we use the term "(agile) meetings" in this guide.

What do we want to achieve?

Agile aspires to achieve selected shifts in the context of meetings.

From	To
Meetings with a lot of content that cannot be covered in the given time	Highly focused meetings with a clear objective and structure
Endless discussion on secondary, nonagenda topics	Action-oriented meetings
Meetings with a large number of participants, many of them without a related role or direct contribution	Meetings with team members who have a direct responsibility for and role related to specific agenda topics
Participants who are there to be in the loop	Only participants with an active role and stake in the discussion—no update meetings

Note: The “From” dimensions serve as an illustrative purpose and do not necessarily reflect the current DT reality.

2. How to get there?

What are the different types of agile meetings?

First, it is crucial to distinguish between the different types of agile meetings. Typically, five types of meetings are considered essential elements:

Meeting occasion (and typical name)	Meeting elements
(Daily) coordination meetings (e.g., daily stand-ups)	Plan the immediate work period (e.g., day). In the meeting, address what has been done and what needs to be done and identify and address any outstanding issues to synchronize the work of the team.
Prioritization meetings (e.g., backlog refinement)	Refine and finalize current priorities/tasks to agree on what needs to be done and consider future priorities and facilitate discussions on effort versus value.
Planning meetings (e.g., sprint planning)	Plan for the upcoming period (e.g., sprint) and allocate resources accordingly.
Review meetings (e.g., demonstration)	Demonstrate the progress of the past period to your stakeholders (e.g., last sprint) and exchange/obtain feedback and identify optimization potential.
Reflection meetings (e.g., retrospective)	Identify what worked well and improvement opportunities, understand root causes of problems, and commit to taking action to improve (e.g., for the next sprint).

How to determine the appropriate structure of meetings?

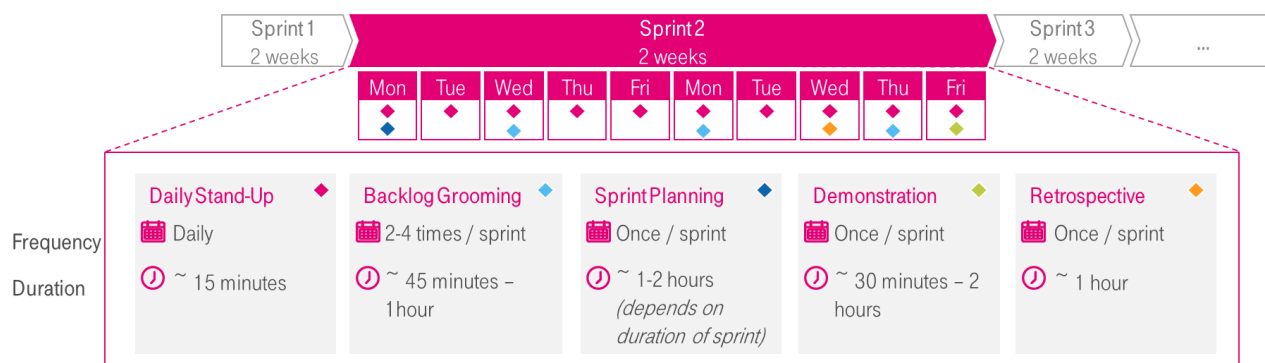
The appropriate structure of meetings depends on the underlying organizational agile archetype (*see how-to-guide “Archetypes”*).

Meeting occasion (and typical name)	Importance of meeting for different organizational agile archetypes		
Archetype	Cross-functional teams	Competence hubs (“flow to work”)	Self-managing “one function” teams ⁸
(Daily) coordination meetings (e.g., daily stand-ups)	Must-have	Depends on the underlying task at hand	Nice-to-have
Prioritization meetings (e.g., backlog refinement)	Must-have		Nice-to-have
Planning meetings (e.g., sprint planning)	Must-have		Must-have
Review meetings (e.g., demonstration)	Must-have		Must-have
Reflection meetings (e.g., retrospective)	Must-have		Must-have
Must-have: essential pillar of agile operating model; nice-to-have: additional enabler of agile operating model			

Although this reflects common practices, teams should always adjust their meeting structure to their needs or underlying tasks/objectives.

Note that the name of the respective agile meeting might differ according to the agile method chosen. The table below reflects a possible chronological order and frequency of the meetings as one would see it in reference to Scrum (in the stage of agile product development and implementation, teams can, along with other less common methods, rely on Scrum to align on delivering a single product and requirements for the agreed duration of the sprint) (*see how-to-guide “Agile methods and frameworks”*).

⁸ Not used in DT AG



Note: The table reflects timing under Scrum; however, teams need to adjust it to their own meeting rhythm (respective need/situation to be considered).

How are the respective meetings structured?

As stated above, five different types of meetings are typically established as part of an agile way of working (regardless of the underlying archetype), namely coordination, prioritization, planning, review, and reflection meetings. These meetings differ with regard to their usual frequency, duration, and recommended/required participants (*see how-to-guide "roles and responsibilities"*). Please note that the representation below relies heavily on the Scrum method for illustrative purposes. Meetings should be scheduled and structured according to the respective needs of the team.

Type	Frequency	Duration for two-week sprint (scales up/down according to the duration of the sprint)	Participants
(Daily) coordination meeting (e.g., “daily stand-up”)	Daily	~15 minutes (regardless of sprint duration)	Squad lead, employees, agile coach (as needed, but at least once per week)
Prioritization meeting (e.g., “backlog refinement”)	Two to four times/sprint	~45 minutes to 60 minutes	Squad lead, stakeholders/experts (if clarification is required), agile coach
Planning meeting (e.g., “sprint planning”)	Once/sprint	~4 hours	Squad lead, employees, agile coach
Review meeting (e.g., “demonstration”)	Once/sprint	~2 hours	Squad lead, employees, stakeholder, agile coach
Reflection meeting (e.g., “retrospective”)	Once/sprint	~1.5 hours	Squad lead, employees, agile coach

Note: For further details on the individual meetings (e.g., typical agenda) please see the Appendix

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3. Additional Information

What relevant enabling formats exist in DT?

A key learning objective is to provide an introduction and step-by-step guidance for the setup and implementation of agile team meetings.

The respective enabling formats are soon to be published on YAM.

Where can you learn more about this topic?

The following additional information can be helpful for the understanding:

NAME	BRIEF DESCRIPTION	LINK
LEAN-AGILE KIT (DETAILS FOR IMPLEMENTATION OF AGILE MEETINGS)	Lean-Agile Kit: customer focused collection of methods, which based on adaptiv planning, evolutionary development, untimely delivery and continuous improvement. It combines design thinking, lean startup, scrum und kanban.	https://yam.telekom.de/groups/design-thinking/projects/lean-agile-kit-overview
MAKING TIME MANAGEMENT THE ORGANIZATION'S PRIORITY	To stop wasting a finite resource, companies should tackle time problems systematically rather than leave them to individuals.	https://www.mckinsey.com/business-functions/organization/our-insights/making-time-management-the-organizations-priority
SCRUM TRAININGS SERIES	Please visit this website for a collection of short videos on how to set-up and structure agile meetings (Scrum) – please see scrum trainings series.	http://scrummethodology.com/
UNLEASHING THE POWER OF SMALL, INDEPENDENT TEAMS	Small, independent teams are the lifeblood of the agile organization. Top executives can unleash them by driving ambition, removing red tape, and helping managers adjust to new norms.	https://www.mckinsey.com/business-functions/organization/our-insights/unleashing-the-power-of-small-independent-teams

Contact

DT IT – Bill Communication: <https://yam.telekom.de/groups/bill-presentment/overview>

DT IT – Market and Corporate Solutions: <https://yam.telekom.de/groups/market-corporate-solutions>

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Appendix

Type	Preparation	Run sheet
(Daily) coordination meeting (e.g., “daily stand-up”)	<ul style="list-style-type: none"> Have yellow sticky notes on hand (only for physical boards). Decide on “speaker toy,” e.g., inflatable beach ball (“only the person who holds the toy may speak”). Have pens and board markers on hand. If appropriate, send the team/ participants a reminder of the date. Preparation for Jira/GitHub. 	<ul style="list-style-type: none"> To start, a randomly selected team member receives the speaker toy. The team member answers three questions: “what did I do yesterday?”; “What will I do today?”; “Are there any impediments (blockers, obstacles)?” The next team member then gets the speaker toy. Steps one to three are repeated until all team members have answered the three questions. If needed, the task board (or Jira) is updated by the relevant team members. (Alternatively, depending on team size and time constraints, the board can be updated before the meeting, but each change must be mentioned and pointed out in the stand-up meeting.) If needed, the squad lead (including process integration and business consultants) can now give feedback on the current user stories. The agile coach asks: “how do you feel about the sprint?” (Team indicates with a gesture such as thumbs up/down.) Negative responses are discussed, and the planning adjusted or escalated, as required. The results are documented below the burndown charts in the form of a smiley. (If needed, the mood barometer is discussed in the retrospective.) The agile coach asks: “are there any blockers/obstacles that we have to escalate in the daily stand-up meeting?”
Prioritization meeting (e.g., “backlog refinement”)	<ul style="list-style-type: none"> The squad lead prepares the backlog or user stories and their acceptance criteria as far as possible. 	<ul style="list-style-type: none"> The squad lead selects the first backlog item. The squad lead and agile coach discuss the item, its priority, and any potential roadblocks/dependencies.

		<ul style="list-style-type: none"> ▪ The squad lead decides on the backlog items to be considered in the next sprint, considering the capacity of the sprint team. ▪ Stakeholders/experts are consulted to clarify backlog items, if needed, and to resolve dependencies.
Planning meeting (e.g., “sprint planning”)	<ul style="list-style-type: none"> ▪ Review the sorting/prioritization of the user stories in the sprint backlog for plausibility (take into account viability, feasibility, desirability). ▪ Visualize the stories using story cards (printouts or sticky notes) or Jira. ▪ Organize the meeting for the entire team, including place, date, and time. 	<ul style="list-style-type: none"> ▪ Determine which of the team members will be present for the upcoming sprint. ▪ The result is recorded where everyone can see it. ▪ The squad lead reads the user story, and the team accepts or rejects it. ▪ The team has the opportunity to ask questions. ▪ The team estimates the time required to complete a story once accepted and aligned. ▪ When the team is “full,” it stops accepting user stories and commits to the user stories that it has agreed on. ▪ During the meeting, all dependencies with other teams are logged and later taken into account in their planning meetings. (Dependencies are documented by the squad leads who are present and later incorporated into the relevant planning meetings. Larger dependencies should be clarified in advance by the squad leads.) ▪ All items for the sprint are listed and time required to complete the items identified is estimated. ▪ The team commits to delivering the sprint.
Review meeting (e.g., “demonstration”)	<ul style="list-style-type: none"> ▪ Organize meeting (location and time). ▪ Invite stakeholders and the project steering committee from the company. ▪ Make sure the sprint goal is visualized (e.g., flipchart, Jira). ▪ Have one green and one red flipchart marker on hand. ▪ Notify the team that the meeting will take place and that they should prepare to 	<ul style="list-style-type: none"> ▪ The agile coach moderates the introduction; the squad lead presents the sprint goal and then gives the floor to the team. ▪ Team representatives present the results (or user stories). ▪ The agile coach records the result on the flipchart. A completed user story gets a green checkmark. An incomplete user story gets a red “x”. ▪ Once all of the results have been presented, the Scrum master gives the floor to the stakeholder.



	<p>present the user stories (~60 minutes before the start).</p> <ul style="list-style-type: none">▪ Schedule about 120 minutes for the team to prepare for the review meeting as part of their sprints.▪ Prepare agenda.	<ul style="list-style-type: none">▪ The meeting is concluded by the squad lead.
Reflection meeting (e.g., "retrospective")	<ul style="list-style-type: none">▪ Five to ten sticky notes for each participant.▪ One location with a large whiteboard or sufficient wall space.▪ Sufficient pens/markers for all participants.▪ Flipchart to record the agreed-upon actions.	<ul style="list-style-type: none">▪ As a team, review results on actions from previous retrospective.▪ Each participant takes five minutes to note the positive and negative highlights of the most recent sprint.▪ One after the other, the employees place their notes on the whiteboard (or wall). (On the whiteboard, a timeline should be predrawn to simplify placement of the notes.)▪ The results are grouped by the moderator (agile coach).▪ The individual groups are then ranked by voting by all participants in the retrospective.▪ Squad lead prioritizes the problems and determine actions for each. If necessary, consider brainstorming priorities and actions.▪ The jointly agreed-upon actions are recorded on a flipchart and later displayed where they are visible to everyone.

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HOW TO SET UP DEVOPS?

In this document we first describe the aspiration for agile businesses, then we establish the DT context. Note: a situational analysis is required to assess the applicability of the elements described in this guide to a specific business area.

This how-to-guide is particularly relevant for:

Target picture	Target group	Business/org. unit leaders	HRBP	Leaders	Employees
Applying agile ways of working	This how-to-guide solely assumes a full agile operating model as target image				
Targeting a full agile operating model		✓	✓	✓	✓

1. Introduction

Why is it important?

Companies need to find ways to unlock the value of the agile transformations they have started or are planning to launch. As companies transform to agile, changing customer behaviors and technology needs are setting new expectations for infrastructure: examples include seamless on-demand access to infrastructure, “always on” permanent uptime availability, a significantly increased pace of new product and feature releases, and in-depth multichannel interactions with customers. In order to adapt to these rapidly changing customer expectations, enterprises noticed that the integration of software development with IT operations (DevOps) can rev up companies’ delivery of new applications. DevOps emphasizes, among other things, rapid building and frequent delivery of software and system updates, with continual user involvement. Under this approach, companies are seeing increased productivity within their software-development teams, faster release of digital products and services, and improved customer experiences. Studies suggests, for instance, that companies can reduce the average number of days required to complete code development and move it into live production from 89 days to 15 days, a mere 17 percent of the original time.

What do we want to achieve?

This how-to-guide describes how enterprises might increase their IT delivery speed through DevOps in an agile environment and which developments they need to consider.

Agile aspires to drive selected shifts in relation to scaling.

From	To
IT department ensuring and supporting the ongoing business activities in a calm and structured way	IT department required to deliver new IT features faster due to changing customer behaviors, expected non-stop availability and higher security
From a rather de-coupled and not integrated IT value chain	High degree of collaboration across IT value chain (business, development, operations, IT infrastructure)
IT infrastructure running on a "plan-build-run" operating model consisting of siloed infrastructure components resulting in IT infrastructure being a bottleneck for agile	Extended DevOps model to include application development, application operations and IT infrastructure into one

Note: The "From" dimensions are for illustrative purposes only and do not necessarily reflect the current DT reality.

2. How to get there?

Why to rely on DevOps?

Under this product-development approach, companies seek to fully integrate their software-development functions with their IT operations, so teams can jointly build, test, release, and maintain new digital applications more frequently and more efficiently. Software is designed with discrete business requirements and system integration in mind, rather than in a vacuum, and developers and operations staffers are equally responsible for the delivery and stability of code.

Thus, DevOps improves collaboration between development teams and IT operations, extending development teams to IT operations in order to offer faster delivery via faster release cycles, using continuous delivery. The DevOps culture embraces automation, monitoring, and sharing to enable such continuous delivery. Historically, development and operations teams have worked in silos and often with opposing priorities. DevOps promotes joint ownership of a technology product by integrating these groups into a single functioning team to improve response times. DevOps can significantly reduce the go-to-market time, productivity, employee engagement and reduce critical outages.

How to implement DevOps?

Implementing DevOps can be achieved through five key principles:

1. **Relentlessly automate operations and infrastructure activities**
Replacing manual interactions by automated processes is key. In addition, building, testing and deploying frequently is fundamental.
2. **Execute test-driven development with high automation**
Writing tests before the features and fully automating testing while also increasing the test coverage is the second key principle to implement DevOps. In addition, teams being encouraged only to release software meeting quality requirements is a principle that is crucial to sustain and foster DevOps in the long run.
3. **Drive standardized self-service access for developers**
Companies need to create a “single source of truth” for all software: one repository for storing, versioning, and tracking all source code. The mainline version of code can then be accessed quickly and reliably. For this approach to be most effective, developers must submit code changes frequently to the repository, which reduces the size of the code to be reviewed by peers as well as the complexity of merging parallel code changes.
4. **Enable maximum agility within each scrum team (no silos)**
Having teams with expertise in both operations and development and allowing these teams to have full ownership of the systems development life cycle is key. In addition, letting the teams decide when to deploy represents the autonomy (within a given frame) that is transferred to agile teams.
5. **Foster a continuous improvement mindset**
Creating a “single team” agile mindset with a continuous improvement culture (for example, regular cadences of agile retrospectives) underlines the significance that an appropriate mindset can have on agile transformation success.

Note: Attached you will find a compilation of common DevOps tools that can be used in different phases of development.

What capabilities facilitate DevOps?

DevOps requires enabling three sets of capabilities. The following table provides an overview of the key capabilities and their respective best-in-class characteristics:

Capabilities		...and its importance for agile ¹
Process and practices	Single source code repository where master branch is always production ready	Must-have
	Automated code quality checks and peer review built into workflow	Must-have
	90%+ automated unit, functionality, security and performance tests	Must-have
	Continuous code commits, merge and integration of code every min/hour throughout day	Nice-to-have
	Fully automated release mgmt. process with controls in place for quality, security, reliability	Must-have
	Fully automated build, package and deploy to any environments with roll-back, zero downtime	Nice-to-have
Technologies	Self-service access to E2E production grade environments on-demand	Must-have
	Self-service catalog of standard solutions fully automated	Must-have
	Full automated monitoring at E2E transaction level with self-healing for standard issues	Must-have
Org & culture	Business outcome focused on delivering value to end customers and/or users	Must-have
	Disciplined learning culture with regular retros and blameless post mortem after issues	Must-have
	Single integrated team with E2E ownership and near-zero hand-offs	Must-have
	Self-organizing Agile teams building self-service infra products	Must-have

¹ Must-have: essential pillar of agile operating model; Nice-to-have: additional enabler of agile operating model

What are the key success factors to establish DevOps?

As the impact of DevOps cuts across every control function, it challenges how teams interact and fundamentally changes many people's roles. There are seven key success factors:

1. **Win the talent war**
Successfully shift skills mix from operations- and project management-heavy to engineering-heavy.
2. **Instill engineering mindset**
Relentless focus on frequent releases and quality, as opposed to process.
3. **Increase applications/product orientation**
Remove functional siloes and enable end-to-end application lifecycle support.
4. **Org. topologies don't matter**
As long as the current organization enables transition to DevOps, **no need for radical changes**, such as merging App Dev & Infra.
5. **Specific tools matter less**
More important to pilot for fit, decide rapidly, and **scale**. Relentlessly control **tools proliferation**.
6. **Invest in building the right interfaces**
Invest in improving interfaces with other constituent stakeholders who own parts of application lifecycle (for example, App Dev, Security).
7. **Expectation setting**
De-couple execution of DevOps journey from cloud migration journey (but use cloud aspirations to inform end-state).

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3. Additional Information

What relevant enabling formats exist in DT?

A key learning objective is to provide an introduction and step-by-step guidance to adopt DevOps.
The respective enabling formats are soon to be published on YAM.

Where can you learn more about this topic?

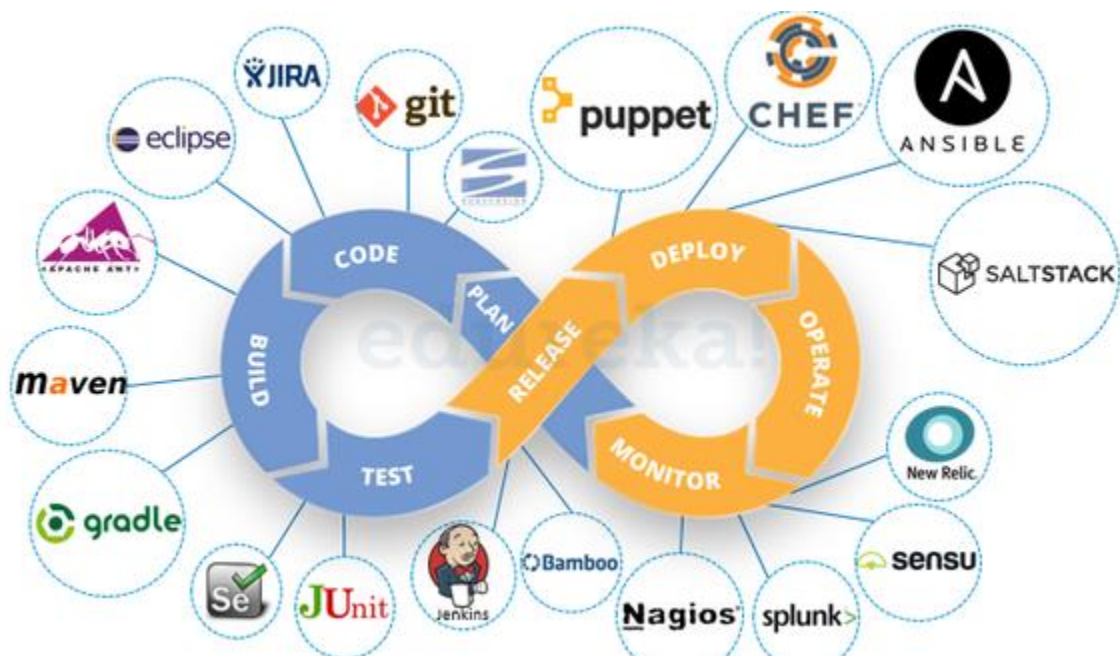
The following additional information can be helpful for the understanding:

NAME	BRIEF DESCRIPTION	LINK
BEYOND AGILE: REORGANIZING IT FOR FASTER SOFTWARE DELIVERY	The integration of software development with IT operations can rev up companies' delivery of new applications. But this approach may not be right for every part of the IT portfolio.	https://www.mckinsey.com/business-functions/digital-mckinsey/our-insights/beyond-agile-reorganizing-it-for-faster-software-delivery
DEVOPS: THE KEY TO IT INFRASTRUCTURE AGILITY	This document summarizes the six fundamental shifts required to extend the DevOps approach into IT infrastructure.	https://www.mckinsey.com/business-functions/digital-mckinsey/our-insights/digital-blog/devops-the-key-to-it-infrastructure-agility
FIVE CULTURAL CHANGES YOU NEED FOR DEVOPS TO WORK	The entire organization needs to be agile for a business to realize its true value, and that requires a change in culture.	https://www.mckinsey.com/business-functions/digital-mckinsey/our-insights/digital-blog/five-cultural-changes-you-need-for-devops-to-work

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Appendix

Compilation of common DevOps tools that can be used in different phases of development:



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F	People
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17	Performance Management	Link
The following questions can be answered by reading this HTG:		Click
Agile aspiration – which design criteria are crucial to consider?		
1. What are the major shifts?		
2. What are the dimensions of performance management?		
3. What are the central pillars of individual performance management?		
4. How is the functional and disciplinary responsibility distributed?		
5. How to determine the appropriate structure of the performance management system?		
6. How is functional and disciplinary responsibility in an agile performance management distributed?		
DT-relevance – which implications does this have on DT?		Click
7. What tools are used at Deutsche Telekom today in the context of performance management?		
Best-practice – from whom can DT learn?		Click
8. Performance Management at Zalando		
Additional information: Where can I learn more about the topic and whom to contact?		Click

18	Career paths	Link
The following questions can be answered by reading this HTG:		Click
Agile aspiration – which design criteria are crucial to consider?		
1. What are the major shifts?		
2. How do we structure career paths in an agile organization?		
3. What are the design principles for building career paths in an agile organization?		
Best-practice – from whom can DT learn?		Click
4. Career Paths at Spotify & Career Paths at technology company		
Additional information: Where can I learn more about the topic?		Click

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HOW TO ESTABLISH PERFORMANCE MANAGEMENT IN AN AGILE ORGANIZATION?

In this document we first describe the aspiration for agile businesses, then we establish the DT context. Note: a situational analysis is required to assess the applicability of the elements described in this guide to a specific business area.

This how-to-guide is particularly relevant for:

Target picture \ Target group	Business/org. unit leaders	HRBP	Leaders	Employees
Applying agile ways of working	This how-to-guide solely assumes a full agile operating model as target image			
Targeting a full agile operating model	✓	✓	✓	✓

1. Introduction

Why is it important?

In traditional organizations, tasks related to performance management are often delegated to the human resource management department or performed quite casually. However, managers in agile organizations need to be sensitized and empowered to take on these tasks independently to maximize the performance of the individual employee, which in turn translates into increased added value for the end-customer. Holistic development of the individual employee includes the establishment of a formal, as well as informal, feedback culture, regular development reviews, and focused linked educational enablers that help the individual to progress which are based on the results of performance management.

What do we want to achieve?

Agile aspires to achieve selected shifts in the context of performance management.

From	To
Retrospective performance assessments based on development goals set on an annual basis	Dynamic performance goals and development measures
Standardized and unified development goals	Individual development goals, including necessary coaching, support, or training
A culture that sees feedbacks as “nice-to-have”	A culture that perceives continuous informal as well as formal feedback as an opportunity to grow (“feedback in the spotlight”)
Passive employees receiving feedback and performance evaluation from the supervisor	Active employees with self-responsibility who proactively consider their performance and demand feedback on a regular basis
An annual feedback in a standardized logic	An event-related feedback culture, adjusted to the given situation and development needs
A one-sided top-down feedback culture that is exposed to subjectivity	A multidimensional feedback culture (e.g., through 360-degree feedbacks) that includes different opinions and perspectives

Note: The "From" dimensions serve for an illustrative purpose and do not necessarily reflect the current DT reality.

2. How to get there?

What are the dimensions of performance management?

(It describes the ideal image in fully agile companies. This does not necessarily apply to your organizational unit.)

Performance Management can be broken down into two main pillars, namely business performance management and individual performance management. The focus of this how-to-guide is on individual performance management only.

Business performance management	Individual performance management
<ul style="list-style-type: none"> Monitors and steers the business results (targets, financials, milestones, etc.) of each organizational unit and team through e.g., Quarterly Business Reviews (QBRs), demos, and retrospectives 	<ul style="list-style-type: none"> Develops and evaluates the contribution, skill set and behavior of each employee Purpose is to help employees perform and grow in their roles Establish (informal) feedback culture

What are the central pillars of individual performance management?

Individual performance management focuses on four dimensions, with underlying aspirations in agile context, which are supported by a corporate culture that promotes performance management:

Performance culture ("How to establish the basis?")

- Establish culture to ensure the transformation of performance management process will be successful.
- Develop managers' coaching skills to support their teams to act at their peak potential (Performance management as the task of a leader).
- Ensure employees are accountable for their own development and success.
- Customize design and processes across business units i.e., no one size fits all.
- Performance management and continuous feedback as a chance to improve and thus contribute to corporate success must be understood, accepted and supported.
- Necessary changes to the performance management and feedback tools within agile.

Goal setting ("What is my work?")

- From financial Key Performance Indicators (KPIs) to holistic and ambitious OKRs (objectives and key results)—(see *how-to-guide "Business steering & budgeting"*).
- OKRs not anchored on the individual level, but on a team level to foster collaboration, effort, and transparency, defined by the team itself - limit to a small number of SMART (specific, measurable, ambitious, realistic and timely) goals that can be impacted by the individual.
- Allow individuals to determine how to achieve their goals.
- From annual goal setting (fixed) to the opportunity to adjust goals during the year (dynamic).

Performance appraisal ("How am I doing?")

- Annual independent talent rounds where each individual case (performance appraisal) is discussed based on the assessment of the case presenter (which should be not be anchored with the disciplinary supervisor).
- Consideration of continuous multiple instant strength-based/development feedback (event-based) e.g. through 360-degree feedback

Ongoing development ("How can I improve?")

- Frequent individual performance dialogue, focusing on growth, team contributions and values adherence, and run as a separate process from daily and weekly business steering.
- De-couple development/career progress and bonus to safeguard intrinsic motivation and reduce efforts on gaming the system.
- Clear skills and expertise expectations should drive the development to mastery (e.g., within skill pools) and provide enough growth opportunities— (*see how-to-guide "Selection and Development"*).

Consequence management ("What will this mean for me?")

- Differentiate between top, middle, and bottom performers – disproportionately reward highest performers, develop the broad middle, and move quickly on underperformers.
- De-couple team and individual target achievement (no linkage of bonus and team performance as basis for consequence management).
- Leverage other rewards and recognition that go beyond compensation to tap into stronger, intrinsic motivators.

How to determine the appropriate structure of the performance management system?

(It describes the ideal image in fully agile companies. This does not necessarily apply to your organizational unit.)

Considering the core pillars of individual performance management as stated above, essential pillars ("Must-have") and additional enabler ("design-choices"/"Nice-to-have") need to be differentiated:

Pillars for Individual Performance Management		...and its importance for agile ¹
Performance culture		Must-have
Goal setting	Holistic and ambitious OKRs	Must-have
	Definition of OKRs	Must-have
	Adjust goals during the year (dynamic)	Must-have
Performance appraisal	Annual independent talent rounds	Nice-to-have
	Continuous multiple instant feedback	Must-have
Ongoing development	Frequent individual performance dialogue	Must-have
	De-couple development/career progress and bonus	Nice-to-have
	Clear skills and expertise expectations drive development	Nice-to-have
Consequence management	Differentiate between top, middle, and bottom performers	Nice-to-have

	De-couple team and individual target achievement	Nice-to-have
	Leverage other rewards	Nice-to-have

¹ Must-have: essential pillar of agile operating model; Nice-to-have: additional enabler of agile operating model

How is functional and disciplinary responsibility in an agile performance management distributed?

In agile teams, functional responsibility (*"Fachliche Führung"*) and disciplinary responsibility (*"Disziplinarische Führung"*) are separated to deliver high-quality work results (functional responsibility) through the best possible employee quality (disciplinary responsibility):

- **Functional responsibility** (e.g., squad lead in cross-functional teams):
 - Participates in and provides input for performance appraisal of employees
 - Provides continuous feedback
 - Actively fosters performance culture
- **Disciplinary responsibility** (e.g., chapter lead in cross-functional teams)
 - Competence development of employees
 - Responsible for performance evaluation of employees (incl. collecting multiple inputs)
 - Consequence management

Please also see how-to-guide "Roles and Responsibilities"

What tools are used at Deutsche Telekom today in the context of performance management?

Tool	Description	Target group
Lead2Win	<u>Year-round</u> performance management process with core and additional elements, via HR Suite	<ul style="list-style-type: none"> ▪ Executives, Staff ▪ As of 01/2019 also for non-tariff employees as well as employees in foreign subsidiaries
Compass	<u>Annual</u> performance appraisal and development plan creation for all tariff employees, via myPortal	Tariff employees to be transferred to Lead2Win

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3. Additional Information

Which relevant enabling formats exist in DT?

On YAM you can find a comprehensive toolbox. There you will find information on all roles and process steps as well as enabling calls: <https://yam.telekom.de/groups/lead2win>

Where can I learn more about the topic?

NAME	BRIEF DESCRIPTION	LINK
CRUCIAL STEPS TO SHAPE YOUR FUTURE PERFORMANCE MANAGEMENT	A recent survey of ours found that more than half of companies are dissatisfied with their current performance management and two-thirds already have made various changes to their processes, however many organizations try to change too much too fast. Thus, this article describes two crucial steps when organizations move to redefine their performance management.	https://www.mckinsey.com/business-functions/organization/our-insights/the-organization-blog/crucial-steps-to-shape-your-future-performance-management
HOW EFFECTIVE GOAL-SETTING MOTIVATES EMPLOYEES	Setting goals can be as challenging as meeting them. The article summarizes three essential things to keep in mind when establishing effective employee goals.	https://www.mckinsey.com/business-functions/organization/our-insights/the-organization-blog/how-effective-goal-setting-motivates-employees
PERFORMANCE MANAGEMENT: WHY KEEPING SCORE IS SO IMPORTANT, AND SO HARD	The elements of a good performance-management system are simple but integrating them into a business's fundamental operating system is more difficult than it seems. The article discusses a few common pitfalls.	https://www.mckinsey.com/business-functions/operations/our-insights/performance-management-why-keeping-score-is-so-important-and-so-hard

Contact

Global Competence Center HRD, Performance Management

<https://yam.telekom.de/groups/futurehrd/projects/hrd-performance-management>

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Appendix

Zalando, a retailer based in Berlin, sells shoes, fashion and beauty items across an array of digital platforms. When the company's senior leaders launched an agile transformation, they realized that hiring and performance management were the two most critical – and most visible – elements of success. They set out to build a new performance management system with four primary objectives:

- Identifying employees' development needs and opportunities
- Enhancing their motivation and empowerment
- Identifying high and low performers (i.e., except for frontline employees, the company uses the performance measures to identify "edge ratings" – the top and bottom 10% of analysts, managers and senior leaders)
- Establishing a holistic, fair and neutral performance appraisal process.

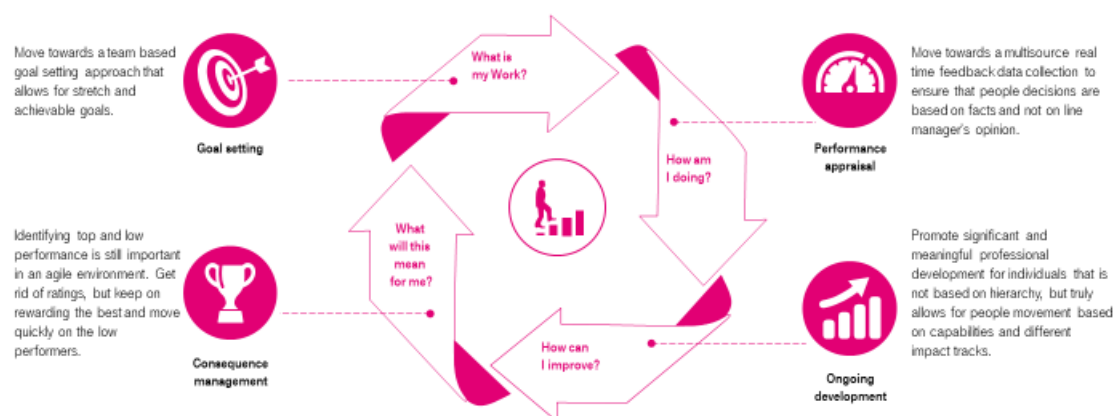
Secondary objectives included improving discipline and instilling a performance mindset, developing high-potential employees and building a "one-firm" culture.

The figure below illustrates the four central pillars of Zalando's performance management system, which is supported by a strong performance culture:

HR – PEOPLE BUSINESS

HR DIGITAL & INNOVATION / HRM-ORG

2 EXAMPLE: ZALANDO – PM SYSTEM AIMS TO GENERATE FOUR CONVERSATIONS SUPPORTED BY A PERFORMANCE CULTURE



T ■ ■ LIFE IS FOR SHARING.

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HOW TO STRUCTURE CAREER PATHS IN AN AGILE ORGANIZATION?

In this document we first describe the aspiration for agile businesses, then we establish the DT context. Note: a situational analysis is required to assess the applicability of the elements described in this guide to a specific business area.

This how-to-guide is particularly relevant for:

Target picture \ Target group	Business/org. unit leaders	HRBP	Leaders	Employees
Applying agile ways of working	This how-to-guide solely assumes a full agile operating model as target image			
Targeting a full agile operating model	✓	✓	✓	✓

1. Introduction

Why is it important?

Organizations that want to move towards an agile operating model need to adjust the architecture of career paths, which offer opportunities for further development. A career path describes the development of an employee, during which the employee can take on different roles depending on which level they are at (see how-to-guide “Performance management”).

Career paths in an agile environment differ from those in a traditional organization, which typically have a strong vertical orientation with only a limited number of career development opportunities. This may offer individuals limited room to grow. In an agile organization, however, *multiple equivalent* career-path-development opportunities are particularly fostered, which build on either the management or the expert career paths. In other words, the idea of experts and management career paths is not new, but their explicit equality in an agile operating model, especially regarding pay and career progress, is. Moreover, these development opportunities are to be embedded in an **open architecture**, giving individuals the opportunity to move between different specialties based on criteria that recognize their personal development aspirations as well as specific business needs. Thus, in an agile organization, we need to move our thinking away from traditional career assumptions.

What do we want to achieve?

Agile aspires to achieve selected shifts in the context of career paths.

From	To
Title or rank is the most important thing	What one does really matters
Vertical career moves	Horizontal as well as vertical career moves within the open development architecture
Management careers perceived as superior to expert careers regarding development opportunities	Expert careers that are perceived and compensated at the same level as management career paths
A few predefined career paths	More open and self-driven career and development choices
Incompatible career paths	Mechanisms that allow transferring between paths based on individual preferences and/or development aspirations

Note: The “From” dimensions are for illustrative purposes only and do not necessarily reflect the current DT reality.

2. How to get there

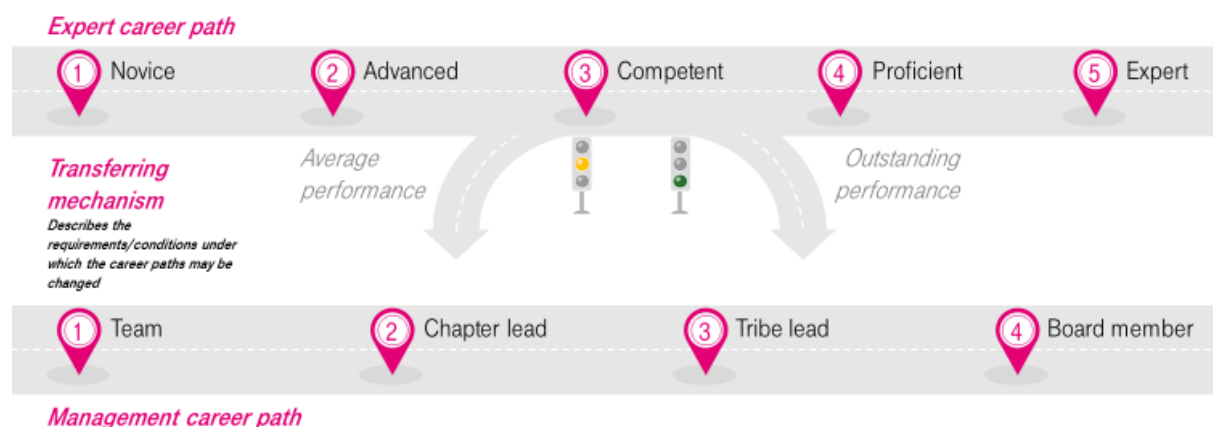
(The described goal of this How-to-Guide is desirable even without an agile organization and does not depend on it.)

How do we structure career paths in an agile organization?

In an agile organization there are multiple career path development opportunities that are embedded within an open architecture. These opportunities build on either the management or the expert career path. However, such opportunities are not anchored to only traditional management and/or a limited number of expert career path development options. The idea of experts and management career paths is not new, but their explicit equality, especially regarding pay and career progress, is.

An open architecture allows employees the flexibility to switch between different career paths using underlying transferring mechanisms. In turn, this open architecture allows individuals to build both broad skills in several areas as well as extensive knowledge in specific areas. This is crucial for senior positions, which require experience in general management combined with expert skills in order to lead teams of experts and deliver qualified decision making.

The benefit of this approach is that it provides the opportunity to assign resources based on the current needs of the business (that is, expertise or talent acquisition) – enabling real organizational agility. The figure below summarizes the core idea of multiple development career paths embedded in an open architecture and indicates how the transfer mechanisms enable the change between the different career paths.



What are the design principles for building career paths in an agile organization?

The following table shows the design principles for building career paths in an agile organization. These criteria are either an essential pillar (must have) or an additional enabler of an agile operating model (nice to have).

Design criteria	Relevance for agile ¹
No limitation of career path development opportunities (multiple career paths possible)	Must have
Each career path with a clear value proposition, i.e., which competences/skills should be developed in the respective career paths in order to address certain business needs	Must have
Expert careers are perceived and compensated at the same level as management career paths	Must have
Compatible dual career paths and a mechanism for transferring between paths, i.e., equal career growth opportunities	Must have
Clearly defined and transparent rules for transferring mechanisms	Must have
Minimal hierarchy in each career path	Nice to have
Dedicated management for each career path (e.g., for development or transfer)	Nice to have
Experienced hires can easily enter career paths at the level corresponding to their experience	Nice to have
¹ Must have: essential pillar of agile operating model; nice to have: additional enabler of agile operating model	

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3. Additional information

Which relevant enabling formats are available at DT?

A key learning objective is to provide an introduction and step-by-step guide for how to develop multiple career path development opportunities embedded in an open architecture. These will soon be published on YAM.

Where can you learn more about this topic?

The following additional source of information is helpful for understanding agile teams.

NAME	BRIEF DESCRIPTION	LINK
PROMOTING CROSS-SECTOR COLLABORATION: AN INTERVIEW WITH PENNY PRITZKER	The former US Secretary of Commerce encourages closer stakeholder coordination and discusses the role of government in workforce transformations	https://www.mckinsey.com/industries/public-sector/our-insights/promoting-cross-sector-collaboration-an-interview-with-penny-pritzker

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Appendix

a) Example – Spotify

Career progress at Spotify is measured based on the level of impact each employee has. The impact is measured based on five key dimensions (see illustration below).

SPOTIFY DEFINES CAREER GROWTH AS GROWTH OF SPHERE OF INFLUENCE



SOURCE: Spotify blog: <https://labs.spotify.com/2015/02/15/spotify-technology-career-steps/>

Steps framework defines career growth at Spotify based on growth of level of impact within the company

There is no link between steps framework and job titles, so an engineer can be on level 3 or 4

Compensation is influenced by steps. Compensation level between steps overlap a lot, so someone on Individual level can earn as much as on Chapter level

Manager can nominate his/her employee for a promotion based on consistent performance on the next level (not linked to performance review cycle)

Performance review dimensions

- Values team success over individual success
- Continuously improves themselves and their team
- Holds themselves and others accountable
- Thinks about the business impact of their work
- Demonstrates mastery of their discipline

McKinsey & Company 111

b) Example – technology company

The example below illustrates a specific application of an open architecture where employees should decide whether to continue growing as an expert or become a manager at a certain stage (see illustration below).

TECHNOLOGY COMPANIES BUILD EQUALLY IMPORTANT CAREER PATH FOR EXPERTS AND MANAGEMENT

Technology company example



Engineers grow from level 2 to level 10, where 2 is new-joiner from a university and 10 is top expert (5-10) employees out of 40,000

At level 5 employee should make a decision whether to continue developing as an expert or become a manager

Compensation on the same level of expert and management track is about the same

Performance assessment happens twice a year at a people committee. Employee's manager presents his/her case based on 360 feedback and interviews with employees' colleagues. Assessment is done in a structured way based on "6 pillars"

In order to be promoted an employee should perform at the next level for 6 months. Promotion decision can be made at people committee twice a year

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GLOSSARY

Agile Term	Definition
Agile / Agility	Being able to respond quickly to changes by adjusting priorities and adapting the organization.
Agile Coach	Supports an agile team with guidance on applying agile techniques, methods, and tools through an entire project.
Backlog (Product Backlog; Sprint Backlog; Impediment Backlog)	<p>Dynamic list of all main demands / tasks in a running scrum project.</p> <p>A Product Backlog provides a structured collection of all demands that are mandatory for the development of a product / service. The demands are prepared by the product owner who is also responsible for maintaining the list (e.g., order / prioritization). The product backlog originates all sprint tasks.</p> <p>A Sprint Backlog contains the tasks of the current sprint. In this way, an overview of the status as well as a timeline is provided. The development / project team owns the backlog and is responsible for regular updates.</p> <p>The scrum master collects all barriers that hinder the team in successfully fulfilling their tasks in an Impediment Backlog.</p>
Backlog Refinement / Backlog Grooming	Either an appointment at the end of a sprint, or a perpetual process of discussions between stakeholders and team members to ensure the readiness of the backlog for the next sprint.
Ceremonies	In an agile environment, the terms 'activities', 'events', or 'ceremonies' are used instead of 'meetings'. In this way, the regularity of team appointments is pointed out. All ceremonies have fixed time boxes. Ceremonies / Scrum events are: Sprint Planning, Dailies, Sprint Review, Retrospective, and Backlog Refinement.
Chapter	The chapter structure organizes employees according to skills (e.g., developers, marketing experts). Employees are deployed in squads.
Chapter Lead	Disciplinary responsible for chapters' employees. He develops skills of employees as well as competences & standards in chapter. Furthermore, he is responsible for performance evaluation (with input from squad leaders). Can also be member of squad team (if not only in disciplinary function – e.g. due to small team size).
Competence Hub	Cluster of experts with similar competences; they are structured by 1 – x chapter.
Competence Hub Lead	Holds the disciplinary responsibility (including authority to transfer functional responsibility temporarily to squad-/project-leads). Disciplinary responsibility can be transferred to the chapter leader. Responsibility for competence development and personnel utilization in hub.

Cross-functional Team	Interdisciplinary team with end-to-end responsibility to create and deliver a product, journey, process, or any creative customer-facing process. A cross-functional team can be designed by tribe, squad and chapter.
Customer / End-Customer	Asks for the product and/or project / service. Usually not member of the agile team.
Daily Stand Up / Dailies	Daily stand-up meeting with all team members at the beginning of every working day (around 15 min.) to inform about current status and further steps.
DevOps	The usually separated units 'development' and 'operations' are merged in DevOps. This new organizational form is created to enable a more effective and efficient collaboration with help of common incentives, processes, and tools.
E2E	Being responsible from the first to the last step of a process or product. Within E2E responsibility there should be a minimum of handovers. In this way, the process is designed efficient and customer friendly.
Epic	The term 'epic' describes a major user story (demands for a new software / product / project). This large body of work is broken down into various smaller user stories for a better specification. Epics are entered in the Product Backlog.
Impediment	Barriers / disorders that hinder the team members in effectively fulfilling their tasks.
Impediment Board	Visualization of impediments that hinder the team members in effectively fulfilling their tasks. Ideally, every team member should have access to the board - that is why a haptic board is useful. In this way, impediments remain visible until they are solved.
Increment	The idea that smaller increments are easier to handle than bigger pieces is the basis of scrum. In this context, an increment is a 'milestone' that can be finished during a sprint. An increment is the summary of all backlog entries that have been finished during the last sprint. At the end of every sprint, the usability of an increment has to be ensured (definition of done).
Initiative	An Initiative is a collection of epics that focus on a common goal.
Iteration	Process of multiple repetitions of similar actions to approximate a designated solution.
Product Owner	<p>Role in scrum. Responsible for the successful development of a product. The product owner puts demands and later examines the increments in terms of functionality, usability, performance, and quality.</p> <p>The tasks of a Product Owner are:</p> <ul style="list-style-type: none"> ▪ represents the functional view and therefore all stakeholders ▪ prioritizes the backlog items in view of maximizing business value

	<ul style="list-style-type: none"> ▪ (preferably) participates at daily scrums to inform himself about progress and status quo ▪ is available for questions by team members <p>Not part of the Product Owner's tasks:</p> <ul style="list-style-type: none"> ▪ leads the team ▪ orders how to work ▪ moderates / active role in daily scrums ▪ modifies backlog during a sprint (e.g., extra requests, deletes tasks) ▪ executes tasks only at the beginning / end of each sprint <p>The organizational role of a product owner is equal to the one of a squad lead, if the affected squad team matches the scrum framework definition of a squad team. Then the functional lead of the team members is transferred from the tribe leader to the squad leader.</p>
Retrospective	<p>At the end of a sprint, the team reflects about its internal collaboration and its professional development.</p> <p>Continual improvement is a basic requirement of scrum projects. In this context, retrospective is an important element. Here, the scrum master moderates and helps the team to find improvements. Previous ways of working are reviewed in view of efficiency and possible optimizations for the next sprint. All aligned improvements need to be documented and entered in the planning of the next sprint.</p>
Scrum	<p>Scrum provides a framework for the application of processes, techniques, and tools to facilitate the development of complex products (e.g., software). Scrum follows the idea that most development projects are too complex for a comprehensive planning. The reduction of complexity is intended to be achieved by three principles:</p> <ol style="list-style-type: none"> 1. transparency: The whole progress and all impediments are always visible for all team members 2. review: Functionalities of products are frequently delivered and reviewed 3. adjustments: The requirements of a product are newly evaluated after every delivery and adjusted when required <p>Scrum is based on a few rules only. It defines three artefacts (Product Backlog, Sprint Backlog, Product Increment), four activities (Sprint Planning, Daily Scrum, Sprint Review, Sprint Retrospective), and three roles (Product Owner, Scrum Master, Development Team).</p>

Scrum Master

Agile processes are highly dynamic. The Scrum Master is responsible for structuring the process. He ensures that every team member is aligned to the rules and organizes events / activities. Furthermore, he supports the team in their daily work by removing impediments.

The tasks of a Scrum Master are:

- takes responsibility for the scrum process and its implementation
- occupies the facilitator role
- strives towards the maximum value and permanent optimization
- removes impediments
- ensures the information exchange between product owner and team
- moderates scrum meetings
- maintains the scrum artefacts (Product Backlog, Sprint Backlog, Product Increments)
- protects the team against unauthorized interventions during a sprint

Not part of the Scrum Master tasks:

- leads the team
- decides about allocation of tasks

Contrary to the agile coach, the scrum master is part of the agile team.

Scrum of Scrums

An overarching meeting in which the work of different scrum teams is aligned.

Scrum Team

A self-organized, cross-functional team that consists of a Product Owner, Scrum Master, and the development team. Scrum teams decide by themselves how to handle the work in hand. They have all necessary competences to achieve results without being dependent from team-external stakeholders.

Shareholder value

Shareholder value is the return shareholders receive from a company. It depends on the management's ability to increase sales, earnings and free cash flow over time, leading to the ability of companies to increase dividends.

Sprint

Within the scrum framework, 'sprint' names an iterative process which usually takes 2 - 4 weeks. Within this timeframe, the team strives to fulfill the defined tasks. Part of the sprint are Sprint Planning, Daily Scrums, development time, sprint review, and sprint retrospective.

Rules for sprint:

- Those changes that endanger the accomplishment of a sprint goal are forbidden
- Quality ambitions are not narrowed down

Sprint Planning	The first step of a sprint is a Sprint Planning in which the deliverables of the upcoming sprint are determined. The tasks are selected from the product backlog, considering the prioritized order of the items as well as the limited timeframe of the sprint.
Sprint Review	The team presents its results to the product owner and all interested stakeholders at the end of every sprint. In this so-called Sprint Review the feedback from Product Owner, stakeholders, and every other participant is collected and considered for the next sprint. On the basis of the presentation, the product owner decides if the product goes live or needs further development. The intention of a review is to learn from mistakes and identify optimization potential.
Squad	(Temporary), interdisciplinary association of employees with consistent responsibility for one goal.
Squad Lead	Tasks of a Squad Lead are: <ul style="list-style-type: none"> ▪ Functional authority and responsibility for employees in squads ▪ Prioritizes activities of squad ▪ Responsibility for squad targets
Task	A user story is broken down in several tasks to reduce complexity. The estimated time to complete one task should not exceed one day.
Task Board	Most Task Boards consist of three columns: 'To Do', 'Doing', and 'Done'. All current tasks are assigned to one of the columns. If required, other columns can be added, e.g. 'identified problems', with impediments that need to be removed.
Team Member	Works within a squad with end-to-end responsibility for a certain mission / limited period of time. Employee assigned to a chapter according to his skills.
Theme	User stories with matching content. E.g., user stories with topic 'monthly reporting' are clustered to one 'theme'. Themes are collected in the backlog.
Tribe	Continuous responsibility for a common goal and consists of several squads.
Tribe Lead	Tasks of a Tribe Lead are: <ul style="list-style-type: none"> ▪ Defines vision and targets for tribes and presents it to tribe members ▪ Designs the tribe-roadmap ▪ Definition of squad-specific targets ▪ Responsible for tribe-KPIs ▪ Responsible for tribe-budget ▪ Manages a group of products or a process ▪ Functional responsibility of squad leader (if squads used for a long period also disciplinary responsibility of squad leader)

User	Provides feedback to the developed functions. Uses the product / service and is therefore an important information source. Typically, the user is part of the product / service development and supports the product owner in prioritizing functionalities. Later, he helps reviewing the usability of functions. (Usually not part of the agile team).
User Story	<p>Product owners write down the demands of users for products / services in User Stories. A user story consists of three elements:</p> <ol style="list-style-type: none"> 1. a short, catchy name for every single user story 2. a short description of the requested demands 3. several 'acceptance' criteria, that define what else - beyond the short demand descriptions - has to be achieved for successful product acceptance by the customer <p>What determines a user story in agile product management?</p> <ul style="list-style-type: none"> ▪ user stories are collected in the backlog ▪ user stories do not only reflect expectations on future solutions, but also concrete demands on deliveries ▪ user stories only consist of a few sentences. They are short and easily understandable but from a customer perspective they are very specific and detailed ▪ user stories stay on demand level without moving to solution level. This means they do not specify technical solutions that only need to be realized by developers ▪ user stories can be realized within one iteration

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