LEARNING UNCUT EPISODE 5: AGILE L&D – RENETTA ALEXANDER & JAMES SCOGGINS

Michelle Ockers: Welcome to another episode of Learning Uncut. I'm Michelle Ockers

Karen Moloney: And, I'm Karen Moloney.

Michelle Ockers: And today we are going to talk with Renetta Alexander and James Scoggins from the Bank of New Zealand about the adoption of Agile practices by their learning and development team. So, welcome Renetta and James.

Renetta Alexander: Thank you.

James Scoggins: Thank you.

Michelle Ockers: There's a lot of talk in Learning and Development circles about this idea of adopting Agile practices and it's open to a lot of interpretation and different styles of what does Agile look like in the context of learning and development. And I think at times, a little bit of misuse by people as well. So, in terms of talking about Agile for Learning and Development, it would be really great to understand from the two of you what working in an Agile way actually means in your context in your team. What does it look like? Perhaps, Renetta, if you want to lead us up on that one.

Renetta Alexander: Yeah. I think that's a really great question. I think some of these things can be quite seductive and we can take off and not really think of it in terms of how do we land it in our context that's going to be usable for our customers and for our users. Certainly in the journey that we've had at BNZ, if I was going to sum up what it is in the context of L&D, I think it's really been more customer and user centric. It's really at the heart of the work, so you're engaging with your audience really early. You're co-creating and looking at opportunities and working through the challenges. You're collectively thinking through how you can bring those capabilities together to really come up with a great outcome for the customer or for the banker.

Michelle Ockers: Yes, and I know we're going to get a bit more into some specific work practices so I'll have a chance to dig into that a bit more as to what that looks like on a day- to- day basis. Taking a step back strategically, why have you chosen to shift work practices to include more Agile approaches, more customer centricity and user centricity?

Renetta Alexander: Certainly from a BNZ strategy perspective, the customer is at the core of the work that we do at BNZ and so along with that, we've got a number of key areas of focus as it were and performance is part of that make up. It's part of being able to ensure that our customer is at the heart of what we do. Adopting our job principles and processes has been part of that journey. Secondly to that, you know one of the big challenges that we do have, and the work that we do, is our ability to speed up and get to market really quickly and the models that we currently have in play don't allow us to do that, so that's a big reason for us to move away from some of the models that no longer work for us and to look at other ways of being able to speed up our time to market, being able to be more customer centric, be able to look for ways of being able to add value in a much more quicker way.

Michelle Ockers: So it sounds like there's a consistency with the way that the bank views their engagement with the customer and seeks to get to market for the customer and add value to the customer, so from your perspective, you're talking about this in the context of speed to market for your learning solutions and delivery to your internal clients? Is that right?

Renetta Alexander: That's right. Yes, that's right.

Michelle Ockers: Karen, shall we talk about the Waterfall project plan and the approach to project planning?

Karen Moloney: Yeah, 'cause I was really interested. This whole idea fascinates me because when I was running projects, we were very specific about our processes and time allotted for different stages in that project plan so that we didn't end up in never-ending loops of iterations, but that seems to have been one of the successes for your project. But I'm just keen to find out a bit more about how you manage keeping your projects on-track and at what point can you say, "we're finished" when you are constantly iterating?

James Scoggins: Yeah. I'm also used to working on Waterfall projects. I come at it from a slightly different angle, and I think one of the problems we used to have is we'd deliver a lot of Rolls-Royce solutions into the business, and we get to the end of the projects, and there's a well-planned ... And then the business would say, "Well, actually, what we really wanted wasn't that really complex solution. It was something much simpler," or it's something slightly else.

And that's where I feel that Agile can certainly help. Because you actually start with a load of opportunities, and these are discovered with the business. So, right from the outset, it feels like you're working alongside them a lot more. And then, we pursue these opportunities, and you evaluate how much value they're gonna deliver, how much effort it's gonna take. And there's a constant sort of cycling back to the business, and saying, " Look how we've done this. Is this what you're looking for?" And then you do a bit more and then you circle back to them, so I think it's that feedback loop that provides the most value and actually helps you make sure you stop when you want 'cause you do get to a point where the business is actually, "We've got what I need. We don't need to go any further."

Karen Moloney: So, we'll just touch on the idea of the Waterfall project plan because when I was running projects for eLearning, it was one of the things that we were quite specific about and rigid about was our process around projects, time we allocated for reviews and feedback so that we didn't end up in continual loops of iterations. Because that would blow out time and budget and all of those things, so, could you give an example of in this project how you would manage keeping that project on-track? And at what point do you stop and say, "We're finished?"

James Scoggins: So, I think we started with the business, and we had a board, and on this board, we put up all of the opportunities that we could pursue as part of the program of work. So, it's not a pre-defined plan that you're going down with these opportunities, and the first thing that we did alongside the business was to evaluate each of these opportunities and work out how much value it would deliver to the business and how it would be measured and what the effort would be to implement either of these or any of these opportunities.

And then with the business and the stakeholders, you decide which of these opportunities you're going to pursue, so that kind of defines the order in which you're plan goes. And then it's a constant feedback look, talking back to those opportunities, how they're tracking and how close to completion they are. And then it's just re-evaluating and revisiting that plan on a regular basis.

Karen Moloney: So in terms of ... you said up until you get to sort of a point where you're finished. Can these things go on indefinitely? 'cause sort of like my experience, is sometimes when you're working on projects there's a mix of stakeholders involved, and if things change, either somebody's got a different idea than the person then and while it's great to get all that feedback, how do you control the endpoint?

I'm sounding like a bit of control freak here. Like, "how do you know when to stop?"

James Scoggins: I think it's each of these opportunities that you have, you need to be very clear on the benefit that it's going to add and what it's going to look like when it's finished. And then you've got something to aim for, so that when you get to a point, you can say, "Okay. We have now achieved this, and this is where we can see that showing up, and this is where it's adding value to the business."

Karen Moloney: So, you're actually look at sort of achieving the outcomes and then allocating the appropriate time and resources through those feedback loops to actually make the thing happen as opposed to saying, "In six months, we're going to be here and we'll just do whatever we need to get there."

Renetta Alexander: Yeah.

James Scoggins: Yeah, and one of the other things that's happened is you go back to the board on a fairly regular basis, and you say, "Has anything changed? Have the priorities shifted around for these opportunities? Are there ones that are now a higher priority that we're going to shift to or are we continuing on the same track?"

Karen Moloney: Okay. Communication and feedback loops as the key to managing your stakeholders through that process, so it's a bit more about how you communicated with them that was different from your usual/traditional way of working and what worked well? So, was there regular weekly catch-ups with stakeholders? Did you work on it per deliverable? Or was it a bit more ad hoc?

James Scoggins: There are weekly reports back to the stakeholders and these were basically reported on the initiative. So, it was like, "This is what we have achieved in the last week. This is what we're aiming to work on in the next week," and we took their feedback on-board. So, it was a fairly regular process to work with them.

Renetta Alexander: I think there's probably one of the key differences is the frequency of communication as well as the transparency of the work. And both cycles are really important. I think, probably, to your earlier question around when is done done. It's in that process that you're really fleshing out that you're actually on the right track or if there's some emerging need or something's changed, that you're able to catch that quite early. But I think, at the same time, it's equally important to continue to manage the stakeholders' expectations, in particular around the kind of experience that you're trying to stand up is a result of it. So, some of the interesting, I think, learning that we've had on our journey is that we've got a good healthy appetite for content in our business, and so, you're still working through that same stuff around wanting to throw everything in there, including the kitchen sink, so you've gotta work that through and continually educate the group that you're with as you go. So it's not a time to put down all your L&D disciplines and kind of go with the flow.

So, I think that's been a really important learning.

Michelle Ockers: So, what doesn't change, Renetta? When you say you don't put away all of your L&D disciplines, what still looks and feels the same for people working in an Agile way in L&D?

Renetta Alexander: I think part of our journey has been trying to understand what are our disciplines set as part as the Agile journey, and I think about what's come up time and time again for me is frameworks. So, interestingly, I think the work that James has specifically been talking to is in an Agile environment, you're moving at velocity, and things are shifting very quickly. And you run the risk of things being produced in a very fragmented way. They're not joined up. It's not netted together. And our role is to ensure that we continue to make meaning around the experience and to find a good segue between the different learning products.

So, I think those things don't change in terms of the disciplines and specialization that we bring from and L&D perspective. So it would be an example of it.

Karen Moloney: I was just interested in ... so we mentioned a couple of times here about the end-user centric approach, a customer-centered approach, to learning, and part of that is a development of learning personas. So, I'm familiar with personas from a marketing context and I've been talking about for a while their value in learning. Could you give us an example of a learning persona that you would've put together and the value that they added to your work versus the traditional Learning Needs Analysis?

James Scoggins: Yeah, sure. So we use a tool called an Opportunity Canvas, which is a way of unpacking the business problem alongside the business, and we use the personas in those sessions. And what we find is that it really helps bring the users to life and it puts them at front-and-center of the conversation. So, you create them alongside your users, and we typically say, "Well, this is what a typical bank would look like." But you actually try and get under the skin of that banker, and we try and think, "Well, what are the challenges they face from a day-to-day basis? How tech-savvy are they? What are they thinking in terms of career aspirations?" Then as we move through the opportunity canvas, we refer back to that person, and we give them a name.

So, we bring them to life, and then we say, "Well, what would this person think in this situation if we were to do this?" And we have found that the business really like them, and they do resonate with the business, and they just provide a useful tool for keeping the user up-front and centre of the conversation.

Karen Moloney: Do you think that's because it's coming from an empathetic place as opposed to a factual place? Again, traditionally, in the industry used to use the skills gap and this is what they know and this is where they need to get to and here's the bit in the middle. And the things you were talking about there were around the ... Where are their challenges? Where are they struggling? Where are they? How are they feeling about technology?

James Scoggins: Absolutely. In a typical Training Needs Analysis they're very dry documents, often very dry project documents. They don't really bring users to life. They just talk about processes, systems, skills, so using the personas, you're actually thinking about the user as a person. So, that's why I think they really help.

Michelle Ockers: And do you create new personas for every project or do you have almost like a library of personas for different roles, different types of people in your organisation that you reuse? How does that work?

Renetta Alexander: It does depend on the project that you're on, and we've tried a couple of things. We do have a number of personas that we've created across a number of different initiatives, but we'll always find it more valuable to actually build them out with the audience that you're with and actually take them on the journey. It's relatively new at BNZ, in terms of Agile outside of the digital team, so when we build them out, it just brings the audience closer to the user and more empathy and really getting under the lid of how is this going to stand up as part of their workplace and what they do?

Karen Moloney: The thing I was thinking about with the ... 'cause I've started using visual boards through my own organization practice. That's a big part of Agile, so things like Kanban boards, initiative boards. I was kind of ready for that changing way of working, but that's obviously quite different to the way a lot of people are used to working. If we're saying with Agile, there's no word for project plan. We're not working up to-do lists and those traditional sort of schedules. So, can you just tell us a bit about the types of visual boards or visual practices that you employed on each of these projects and of projects overall and how your team responded to working in that way?

James Scoggins: Sure. So, what I'll say is a lot of teams at BNZ use a low-fi visual board, so it is, literally, on a wall in a room. And that's great if you're co-located. We don't have that luxury, so we tend to use Microsoft Planner. So, everyone can contribute and put their work into the board, and we can all see it. Then when we have meetings, we actually talk to the board and actually what's on it.

Karen Moloney: Okay. What were the challenges? So, did your team respond ... Was this an easy transition for them to get to working like that and collaborating online together that way? Or was there -?

Renetta Alexander: A walk in the park.

James Scoggins: It's a steep learning curve. I think one of the challenges is breaking the work down into the right-size chunks and also to write meaningful tasks. It's actually quite challenging to do that, and I think we were pretty surprised at how hard everyone found this. It sounds quite easy, but actually it's quite difficult to break the work down and to make it meaningful. And that's probably one of the things we've struggled with.

Renetta Alexander: You've really got to get the buy in of the team, too, so the work has to go here. It doesn't go in your personal drive or elsewhere. The visibility and the transparency of the work is actually the key if you're working in an Agile environment, so the information, the inputs, the activities, it's ... everybody can see it at the same time. And so, I think the shift in moving from having your own work station, as it were, with your pieces of work and then you congregate with your different members who were over doing the project to actually putting it into a virtual environment and then showing your work in a meaningful way. So, that whoever's looking at that can get a really understanding or at least an overview of what's involved with that piece of work. And then really breaking down the task and activities so that our deliver and design team can come in and get a really good sense of what it is that they need to do with that piece.

But also, what's the capability required to be able to undertake that piece of work?

Karen Moloney: And so how did you actually get people onboard with doing this? Was there some kind of training that you did with them or was it more, "Here's the tool. Play with it - we'll work it out as we go."? What was the approach?

Renetta Alexander: There was definitely some conversations over time and really working out with the team. You know, how are we going to do this? In particular, being a geographically-dispersed team and are not co-located. So, there's lots of discussions, and also, lots of variety of tools. And I'm sure James can add to this, but we looked at numerous tools. And we needed to find something that could be adapted and adopted quickly. It wasn't going to be onerous. It wasn't going to add more time to the time that people have worked, and something that people could really relate to and learn with. So, with that in mind, we found this tool, and it was really about spending some time with the team to really introduce the tool and to understand all of the capability requirements that sit behind this to get people set up for success. And so what we did, we set up a couple example Kanbans and took a piece of work and worked through, as team, as to how that would look as part of the plan.

Michelle Ockers: How far ahead do you plan out the work on a Kanban board, Renetta?

Renetta Alexander: Yeah. It's interesting 'cause I think it's part of the process we've been learning. How do you chunk the material? What's the timeline that you use? How many people do you need onboard with it? What's the expectations of the customer? How does it relate to other pieces of work? So we've done a couple of versions in terms of setting up the Kanban in a way that's usable. So, in terms of the timing ... Sorry, so coming back to your question, Michelle?

Michelle Ockers: Yes? It was really about how far ... So, obviously, it's when you're moving into this Agile way of working, you're not abandoning having schedules and managing work and having tasks assigned and so on all together, but you're not starting with the whole thing planned out aimed to end the way you might one you've gotten to a certain point through the ADDIE process, if you're using ADDIE or Waterfall. So you still have a schedule of sorts, but you're running it via a Kanban board, so my curiosity was around how far ahead are you planning out using the Kanban board?

James Scoggins: Well, you could have quite a large backlog on any of the boards, so all of the work that you have identified goes into a backlog. And then it's largely about, I think, driven by stakeholders, if you've set expectations with them that will drive the rhythm of the work. So, you might say, "Well. Okay. We want to get this piece of work in front of a stakeholder by this date," and then you start to put schedules on it based on that. So we've tried a number of things. We did try putting the work into buckets by which month the work was going to drop, but that didn't work for us. So, we've sort of adapted it.

And I'll say now, it's really about having those conversations with a stakeholder, setting expectations, and then that drives your schedule.

Renetta Alexander: I think the other part to that, as mentioned earlier, the Opportunity Canvas, and when you come out of those discussions with the business, it's really important that you've got a really good sense of what the priorities are around the work pieces 'cause that determines the timelines as well.

So, there are some expected activities that you know need to be done within a certain timeline, so the discovery needs to be really robust and there's a good bit of time spent up there. And then there are other activities that will naturally follow on from that. So, I think, to James's point, that first discussion does determine a lot of the operating rhythm, but you’ve also got the added complexity of if it's part of something bigger.

So, again, the visibility of the boards and the conversations the flow across the team continue to be important so that we can really see where those leverage points are across the different Kanbans. Otherwise, you kind of risk, at the same time, the replication of effort and resource.

Karen Moloney: So, with an Agile approach, it requires your team to constantly be flexing. So, moving between opportunities and working through feedback loops et cetera. How did you prepare your team for that more fluid way of working and what were your biggest challenges with that?

Renetta Alexander: Some of the work that we did right at the very beginning - and I'm really working from memory here- is when we changed our reporting lines from the business to OD, it was a really great opportunity for us to re-imagine Learning and Development, so we spent quite a bit of time up-front really getting clear on our customer value proposition. And it was a really great opportunity for us to think differently about how we want to show up with the business areas that we serve. And so, really it was from the journey, really, and then the conversations started from that point. And we've also spent quite a bit of time on understanding, "Well, if we're going to adopt some of these practices, what are some of the critical capabilities that set behind it?" And why it's important to define that is 'cause it's overwhelming. There's so much that you can do.

Karen Moloney: True.

Renetta Alexander: But where we landed was that the first point that's going to be really key is the conversations that we have with the business, so we spent a bit of time training up the team to deliver opportunity canvas conversations. And they range from a two-hour conversation to a five-hour to a full day, depending on the size of the work that you're working with. So, that was the first starting point for us, and then, really understand all of the other tools and the technology that we needed. That's the next phase that followed from there. And then really sort of choosing a piece of work that we wanted to practice on.

Karen Moloney: Okay. And if you had to do it again, what would you do differently?

Renetta Alexander: I think that the work that you choose to practice on is something that we probably would ... is probably what we would think differently about. And again, it's a journey for all of us and BNZ, and so I think that we didn't quite anticipate that change that came with what we were doing. And so we've had some really good learnings, and we've had some failures. And we've learned from that, so I think that anything that we would try again is really critically looking at, "Well, what would be an ideal piece of work for us to get some good learning from?" at the same time ensuring that the customer's getting some good outcomes and learning as well.

Michelle Ockers: And what would you look for? If someone else was starting their foray into shifting some of their practices to be more Agile, what suggestions would you give them as to what characteristics would be of an ideal piece of work to start out on?

Renetta Alexander: I'll start with a couple. James, maybe you could jump in. Certainly go with a low-risk project. So, when I say low-risk, it hasn't got a high visibility and the risk isn't going to impede on a customer experience. I think it's really important to have a leader that is open to the learning, but also, some of the practices that come with working in an Agile way. We're moving away from the idea that Learning and Development, go away and write up recommendations and a big plan to actually sitting down with your stakeholders and actually working through to through to get a, you know, "What is the opportunity or the challenge that we're solving for and how do we collectively co-create that?" So that shift is significant on many levels, and it requires more input. It requires more dedication. It requires more time. And so, I think that's a really important criteria when you're sitting down with your stakeholder and who you chose to work with on it, that they get a really good sense of what that shift does look like and how that might impact on their current work practices.

Michelle Ockers: Yeah. So, in terms of tips, then, are there any top three tips for anyone looking to adopt Agile practices in learning and development? Things that you wish that someone had told you when you started out?

James Scoggins: I think taking small steps to start with helps it. It can be very daunting when you start to embark on our job because there are so many tools out there. There's a lot of different methodologies. I think it's about picking a few that you think are gonna work and just trying them out and fail fast. If they don't work, then put them aside and then try something else. So, we went through a few iterations of this until, I think, we found something that worked for us.

Michelle Ockers: Yep.

Renetta Alexander: I think the other piece, too, is to really think about the capability required and to spend time on training up the team on some of the concepts, expose them to other parts of the business if Agile is a practice, and get people to their own research, and to have a think about how that might sharpen the way in which they do their work. I think it's a really important focus. I think the other tip is just to find a sponsor that will have your back, either way, in the success as well as the failures.

James Scoggins: And, I think, also, to create an environment with the team where it's okay to fail. Some things are going to fall by the wayside and that there is gonna be some experimentation. So, it's creating that safe environment where people feel that they can put ideas forward.

Michelle Ockers: Great. Thank you. And final question for each of you, start with you, James. What's something you do on an ongoing basis for your own professional development?

James Scoggins: Well, at the moment, I'll say Agile has been a real learning journey for me, so I'm a bit of a magpie. And there's quite a few Agile team within BNZ. I just like to go and see how they work, so it's going and spending a bit of time with them, looking at their visual boards and talking to them, what problems they're facing. So, I think it's just getting in front of other parts of the business and seeing how they're doing things.

Michelle Ockers: Yes. So, learning from others.

James Scoggins: Yeah. Absolutely.

Michelle Ockers: And how about yourself, Renetta?

Renetta Alexander: Yeah, it's the same for me. Definitely learning from others, and I'm doing a lot of reading across a number of different media and I find some, just some absolute gems in terms of what people are up to. It's quite thought-provoking. And I'm also doing a couple of edX learning as well, in particular, around leading in a digital age, so finding it really insightful.

Michelle Ockers: So MOOC's through edX. And if people would like to follow up and get in touch to learn about bit more about some of the things you've spoken about today, what's the best way for them to get in touch with you?

Renetta Alexander: Well, you can certainly find me on LinkedIn.

James Scoggins: Yeah, and they can find me on LinkedIn.

Michelle Ockers: Fantastic. We'll put links to your profiles in the show notes along with some of the other resources that you've spoken about and generously shared with us. Thank you so much for sharing your Agile story with us today, Renetta and James.

Karen Moloney: Thanks, guys.

James Scoggins: Thank you.

Renetta Alexander: Thanks for the opportunity.