



# Recommendations for ARC Trainer and Coaching Enablement

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# Approach/Agenda

## Approach:

- 3 areas are part of this competency assessment
  - Role preferences
  - TRAIL understanding
  - Agile Competencies Self-Assessment
- Informal analysis of the data with recommendations

# Exercise 1:



<b>Counselor</b> "You do it; I will be your sounding board."	<b>Coach</b> "You did well; you can add this next time."	<b>Partner</b> "We will do it together and learn from each other."
<b>Facilitator</b> "You do it; I will attend to the process."	<b>Teacher</b> "Here are some principles you can use to solve problems of this type."	<b>Modeler</b> "I will do it, you watch so you can learn from me."
<b>Reflective observer</b> "You do it; I will watch and tell you what I see and hear."	<b>Technical advisor</b> "I will answer your questions as you go along."	<b>Hands-on expert</b> "I will do it for you; I will tell you what to do."

Instructions: Put the star where you feel most comfortable! And the "X" for Least...

# Exercise 1: Results



Counselor	Coach 3	Partner 3
Facilitator	Teacher	Modeler 1
Reflective Observer 2	Technical Advisor	Hands-on Expert



Counselor 2	Coach 1	Partner
Facilitator 1	Teacher	Modeler
Reflective Observer 2	Technical Advisor	Hands-on Expert 3

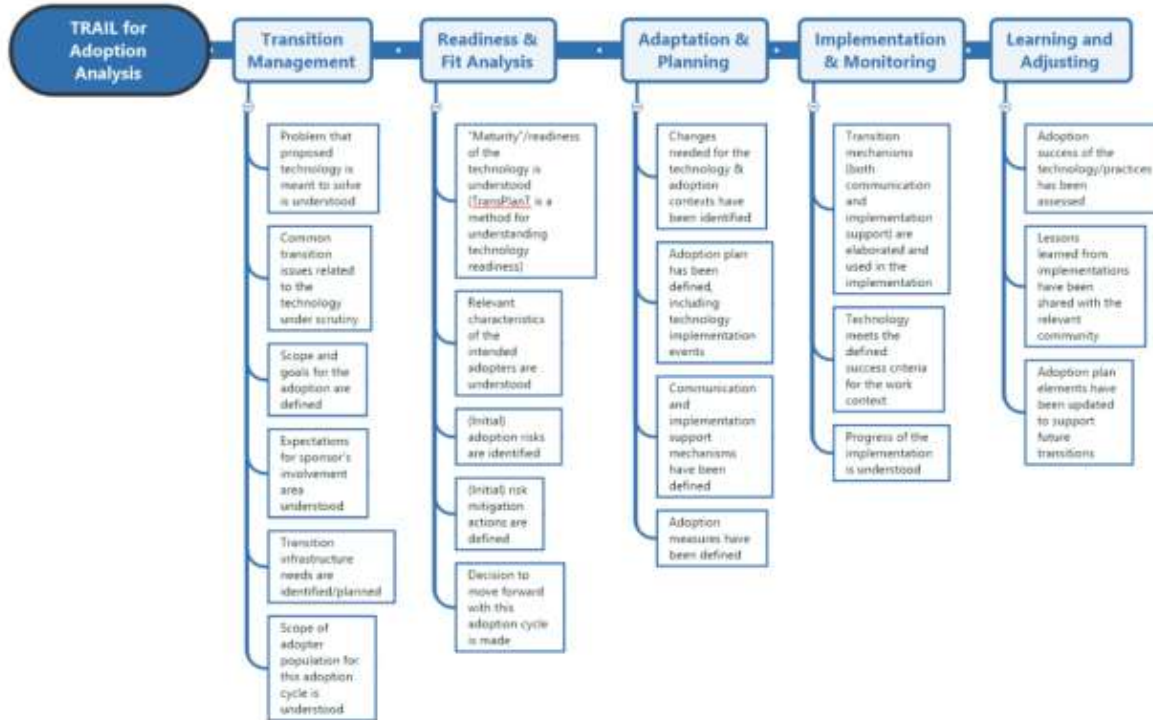
Instructions: Put the star where you feel most comfortable! And the "X" for Least...

# Reflections

No one listed “Facilitator” as one of their preferences/strong skill sets.

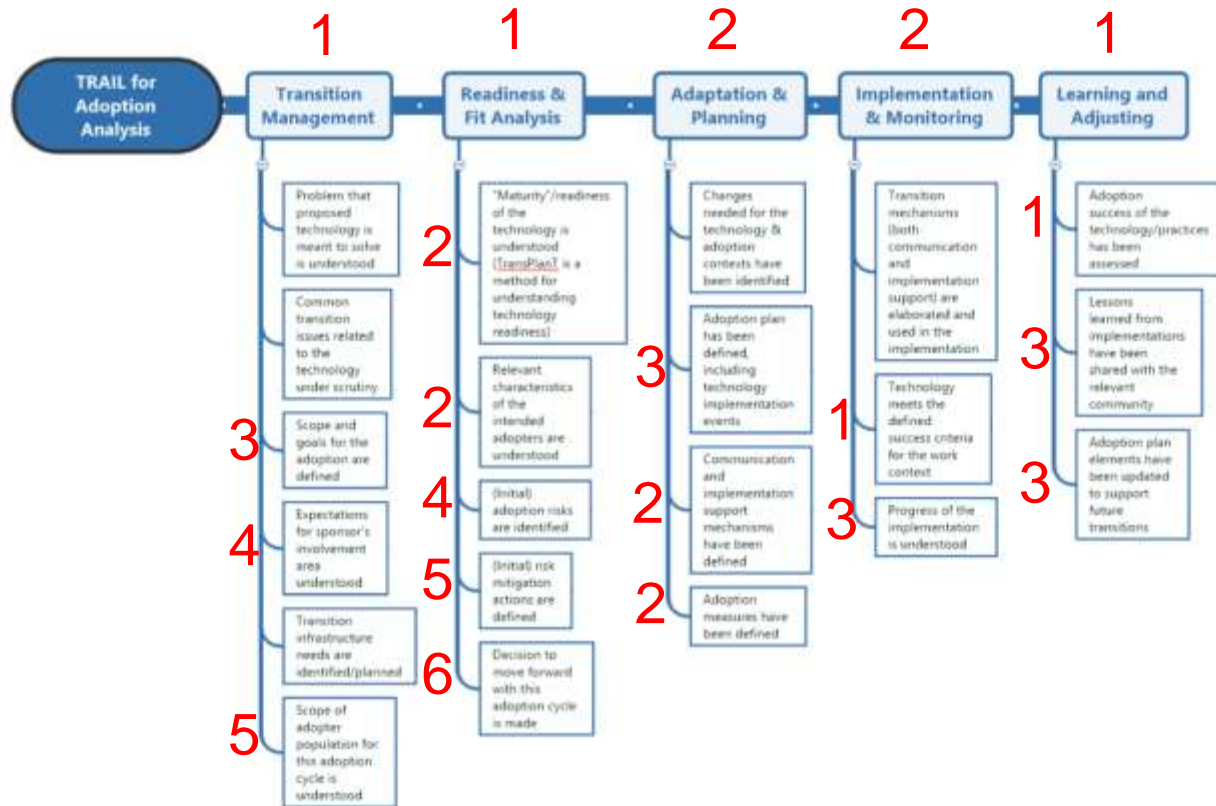
- This is a skill/role that is used frequently in ARC coaching and meetings.
- Training in basic facilitation concepts and skills could help to make staff less hesitant to perform in this role

# Exercise 2: Where are we?



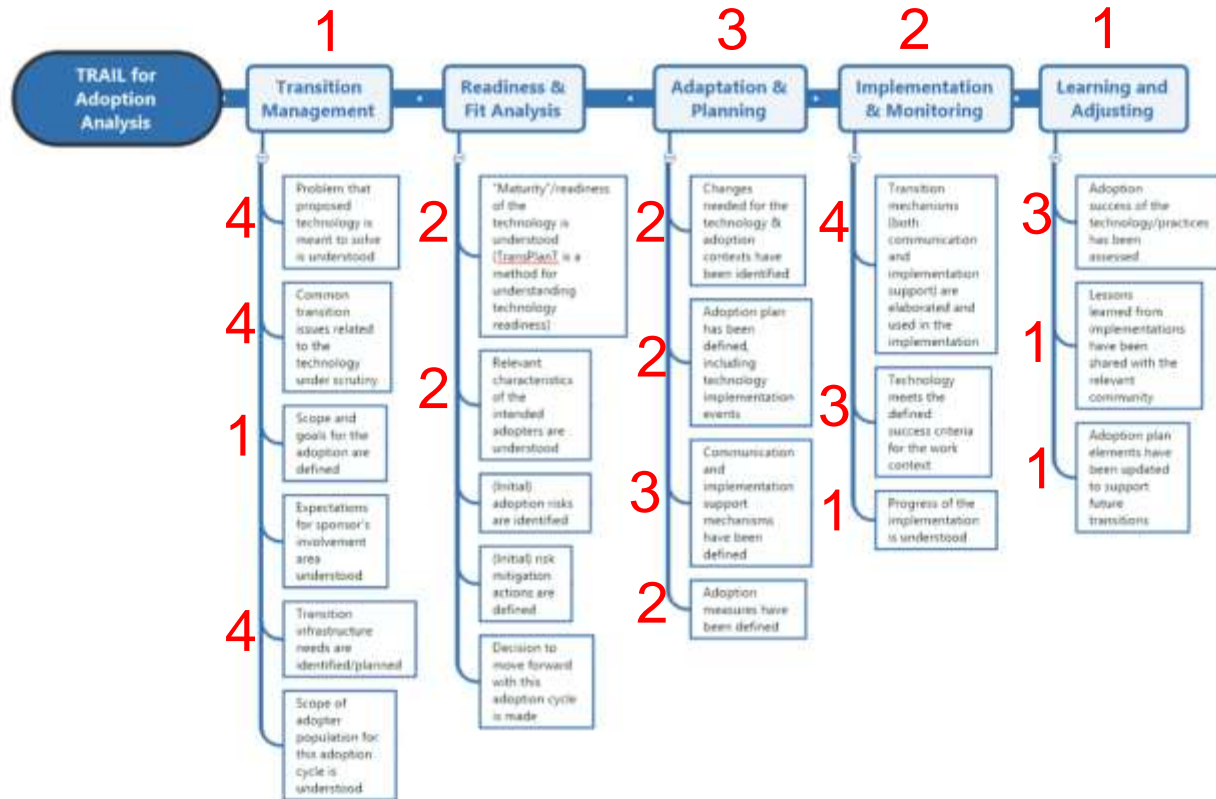
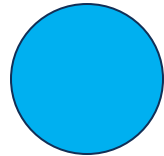
Instructions: Use Stars for the Agile Adoption and Circles for the Jira/Confluence adoption

# Exercise 2: Results—Agile Adoption



Instructions: Use Stars for the Agile Adoption and Circles for the Jira/Confluence adoption

# Exercise 2: Results—Jira/Confluence



Instructions: Use Stars for the Agile Adoption and Circles for the Jira/Confluence adoption

# Reflections on TRAIL Assessment

There were many misunderstandings of the TRAIL framework exhibited in this exercise (not surprising since the TRAIL overview in the workshop was less than one hour)

- Providing more in depth training on the TRAIL framework will help ARC coaches to independently plan/execute new practice adoption support

## Exercise 3:

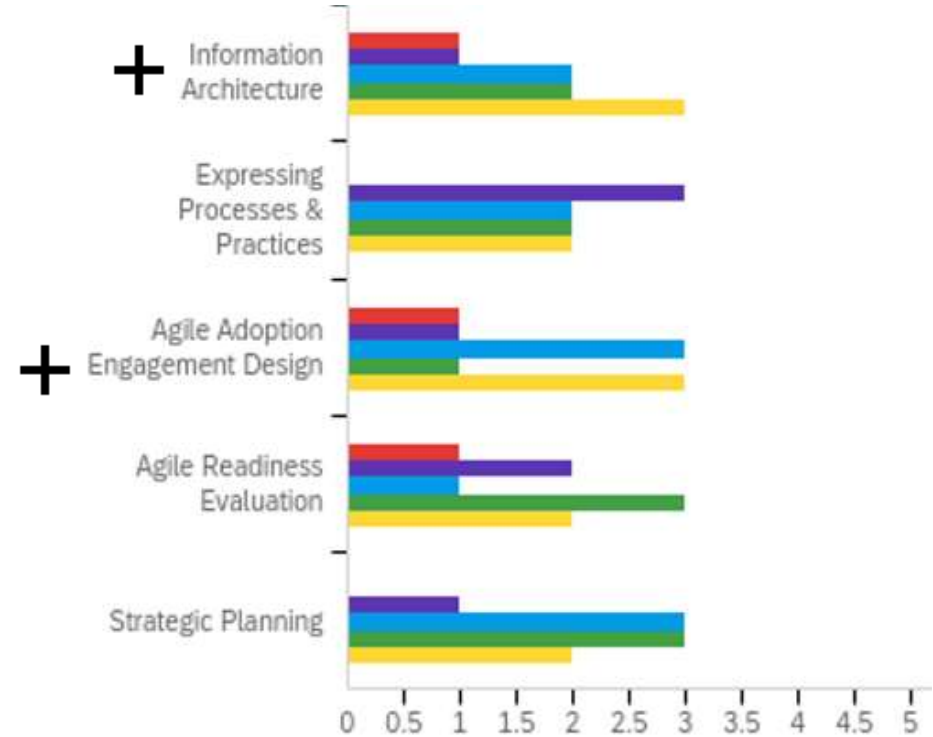
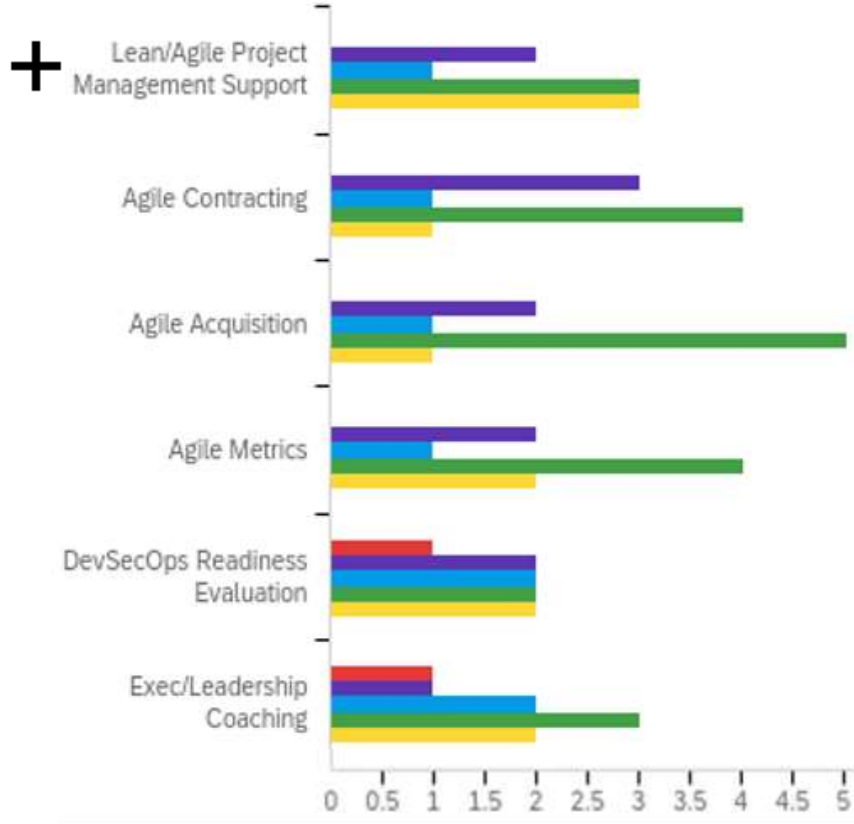
Complete the online survey about your Agile Competencies here:

[https://sei.az1.qualtrics.com/jfe/form/SV\\_doRHuRsYSqRnKmO](https://sei.az1.qualtrics.com/jfe/form/SV_doRHuRsYSqRnKmO)

Responses will be analyzed to inform future training plans.

# Exercise 3: Results Agile Project Management/Coaching

- 1 - I've never done this
- 2 - Some idea but not comfortable executing
- 3 - Could probably execute with partner
- 4 - Could execute on my own with coaching
- 5 - Comfortable executing



# Reflections-Agile Project Mgmt and Coaching

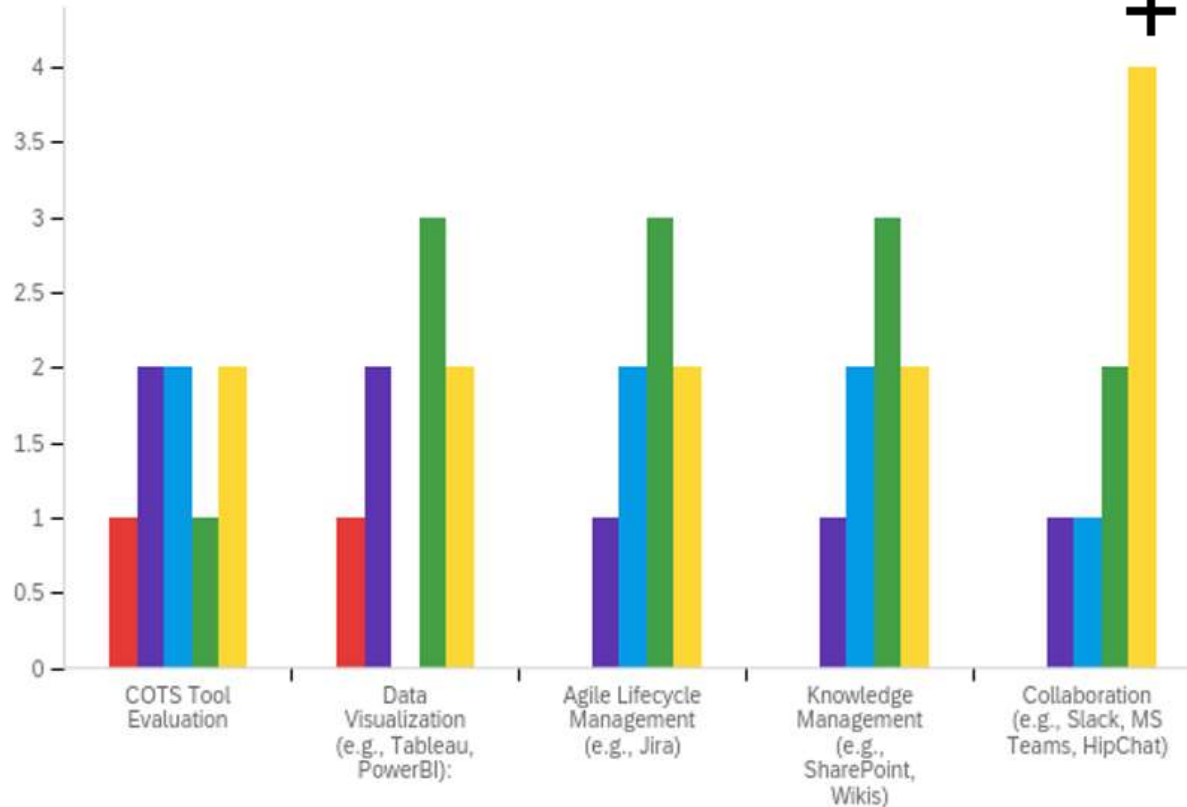
Based on the combination of results and typical volume of need for the skill within an ARC function, the following areas are recommended for additional skill building:

- Agile adoption engagement design
- Expressing process and practices
- Information architecture

Although some areas, like DSO Evaluation and Strategic Planning, also scored relatively lower, the need for those skills doesn't come up as frequently in an ARC setting.

# Exercise 3: Results Tools

- 1 - I've never done this
- 2 - Some idea but not comfortable executing
- 3 - Could probably execute with partner
- 4 - Could execute on my own with coaching
- 5 - Comfortable executing



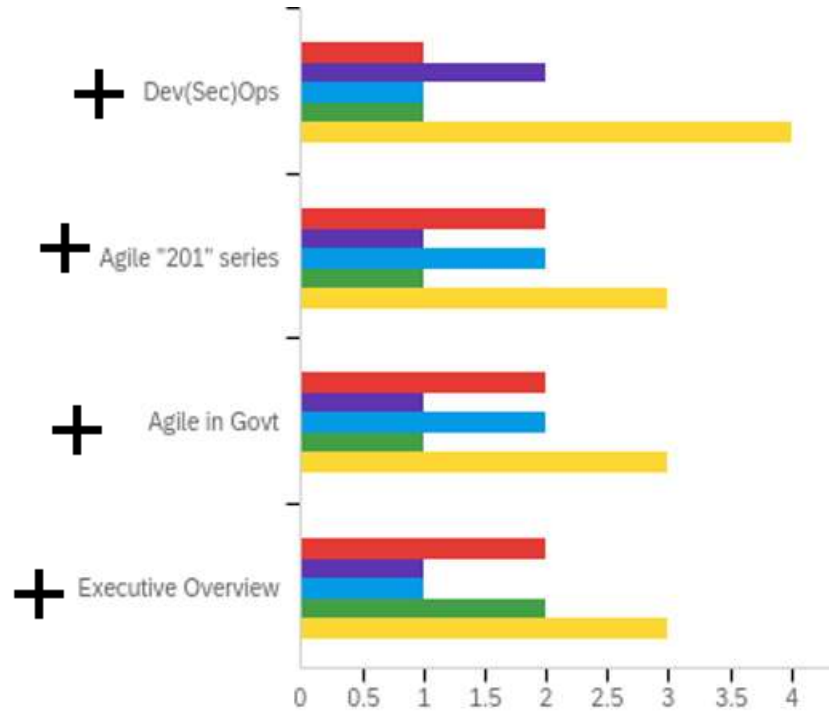
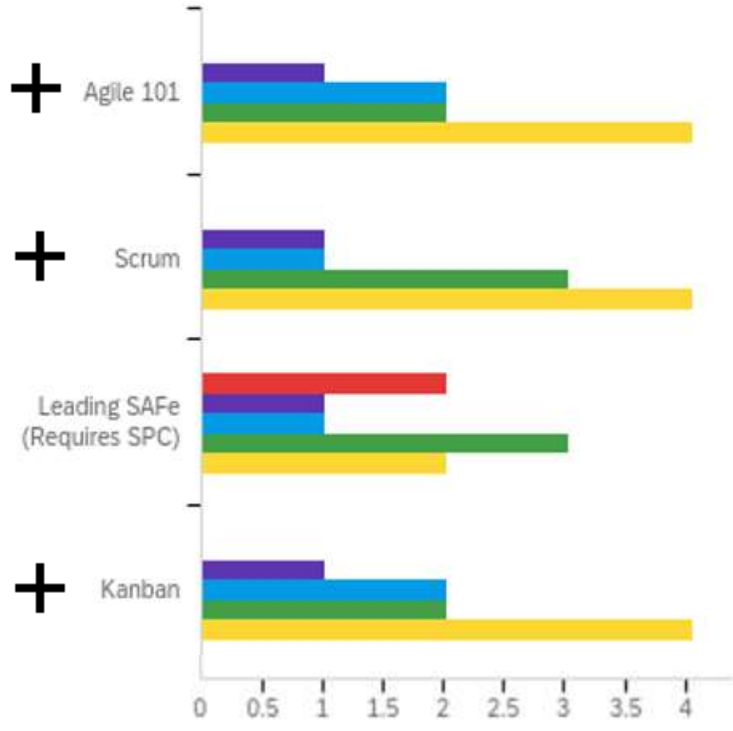
# Reflections-Tools

Not surprisingly, greatest skill self-assessed is in relation to Collaboration tools. A couple of toolsets had some “never done that” ratings, so you might consider those first:

- COTS tool evaluation – this is something that would come into play in a coaching setting most likely
- Data visualization tools – these are becoming more accessible to people outside the finance and business intelligence communities; ARC coaches becoming skilled in this area is not a near term necessity but would be an enhancement for ARC staff to have

# Exercise 3: Results Agile/Lean Training Conduct

- 1 - I've never done this
- 2 - Some idea but not comfortable executing
- 3 - Could probably execute with partner
- 4 - Could execute on my own with coaching
- 5 - Comfortable executing



# Reflections-Agile/Lean Training Conduct

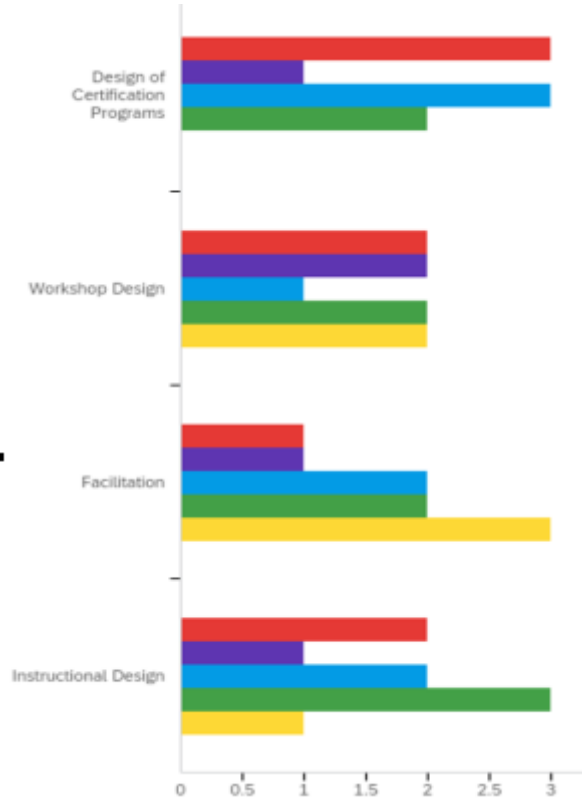
This is the area that the group indicated the most competency in. Because there are several courses where “never done this” shows up, recommendation is to do a “train the trainer” course that addresses **education and training practices for adult learners**.

- There are probably external courses available for this competency
- SEI also has a course on training for adult learners that could be provided.

# Exercise 3: Results Agile Training and Workshop Design & Execution

- 1 - I've never done this
- 2 - Some idea but not comfortable executing
- 3 - Could probably execute with partner
- 4 - Could execute on my own with coaching
- 5 - Comfortable executing

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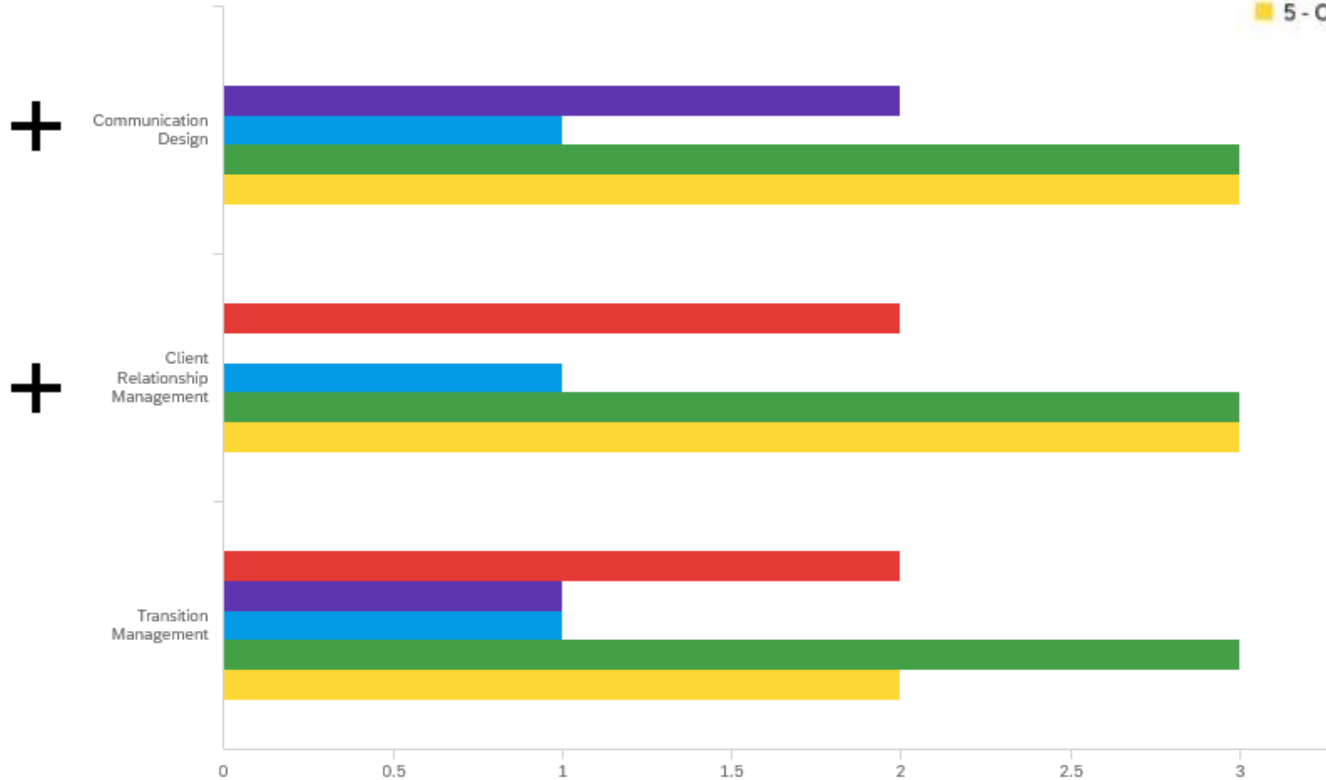
# Reflections—Agile training workshop design

Not surprisingly, less competence in Agile training workshop design is exhibited in the group. This is a competency not needed for everyone in the ARC.

Recommend that those interested in this competency get some mentoring from SEI in this area, and look for external workshop design training as well.

# Exercise 3: Results ARC Operations

- 1 - I've never done this
- 2 - Some idea but not comfortable executing
- 3 - Could probably execute with partner
- 4 - Could execute on my own with coaching
- 5 - Comfortable executing



# Reflections—ARC Operations

The greatest competency in these areas is in Communications Planning. For other competencies, see below:

- Client relationship management – Consulting Skills courses like those offered by Peter Block (Flawless Consulting) is the source for SEI’s customer consultants; other frameworks are also available
  - SEI can provide an overview of the Flawless Consulting process, but is not authorized to do a complete course on that framework
- Transition management – There are not many education resources on transition management publicly.
  - SEI’s Adoption Workshop is the first course to educate about transition management; other courses on specialty areas, like TRAIL and Adoption Population analysis, are also available

# Summary

# Competency Training Recommendations-1

Competency	Why Needed	Candidate Providers
Facilitation Skills	Commonly used in coaching and teaching	Search gov't catalog SEI would have to develop from scratch
TRAIL Adoption Framework	Basis for engagement planning and adoption cycles	SEI is originator of TRAIL; only provider
Agile adoption engagement design	Basic skills of coaching	Part of TRAIL
Expressing process and practices	Frequent inclusion in coaching	Search gov't catalog SEI can provide with minimal development
Information architecture	Structuring Confluence workspaces, etc often part of coaching	Search gov't catalog SEI can provide with minimal development

(note: these are not prioritized)

# Competency Training Recommendations-2

Competency	Why Needed	Candidate Providers
COTS Tool Evaluation	Occasional need when new tools are being considered	Search gov't catalog SEI can provide
Data Visualization Tools	Useful to be competent in the visualization tools in use during coaching	Vendors of particular tools SEI does not provide
Education & Training for Adult Learners	Training is a frequent activity for ARC staff; understanding needs of Adults improves efficacy	Search gov't catalog SEI can provide with minimal development
(Agile) Training Workshop Design	A few ARC staff need to be able to design new training as needed	Search gov't catalog SEI can provide mentoring; might be able to provide training
Client Relationship Management	Consulting is main activity of coaching	Search gov't catalog Flawless Consulting is base for SEI
Transition Management	Managing transition is a foundational ARC competency	Search gov't catalog SEI can provide mentoring and trng

(note: these are not prioritized)

# Recommended Approach to Improving Competencies

Half day ARC training event once per month

- Overviews initially of topics
- Decision about which to “deep dive”
- For SEI-provided topics, deep dives or scheduling of longer sessions

Foundational (recommend all ARC members take)

- Education and Training of Adult Learners
- TRAIL/Transition Management
- Flawless Consulting (client relationship management)
- Adoption Engagement Design
- Facilitation Skills

Special topics (not all staff may need or want to take all of these)

- Information Architecture
- Training Workshop Design
- Data Visualization Tools
- COTS Evaluation

Note: individuals may have additional training to improve particular competencies not mentioned here; these can be arranged on an individual basis