

## Agile is Spreading

Agile Innovation, and the Scrum framework are being associated with more business areas than ever before. To understand why, explore the HBR Article 'The Secret History of Agile Innovation' by Darrell K. Rigby, Jeff Sutherland and Hirotaka Takeuchi. We start to see how Scrum emerged from the world of Product and later Software Development and understand why it has the potential to spread through much of the organisation. As we consider the Scrum framework, we can reflect on this definition.

*'Scrum is a framework within which people can address complex adaptive problems, while productively and creatively delivering products of the highest possible value'*

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## Sales Forecasting

In this story, we explore how the Scrum framework has been used to change the way several sales teams were run on a day-to-day basis. The desired outcome of the behavioural change programme was increased confidence and predictability of the sales forecasting process while ALSO enhancing sales performance. Using a Design Thinking approach to frame the behavioural change programme it became apparent the Scrum framework provided much of what was needed. However, there were two items that needed to be explicitly brought front and centre stage!

'Accountability' AND 'Psychological Safety'

## Benefits

When the Scrum framework is combined explicitly with Accountability AND Psychological Safety for sales teams, you truly can develop a 'Team Spirit' that delivers on **increased forecast accuracy and increased sales performance**.

How do you know when this is in play? The sales numbers are easy to measure in terms of actual bookings and variance from forecast. However, as sales team members seek to hit their individual objectives, they are also driving just as hard to ensure the overall team meets the business objectives, in a truly collaborative endeavour. The real test is when an individual commits their time and effort in support of the team and therefore the organisation, assuming all is aligned. By doing so they may not be achieving the strongest outcome for themselves, personally.

In other words, they are prepared to 'take one for the team'

## Psychological Safety?

There aren't many people that would challenge the need for Accountability, but what's this Psychological Safety topic?

Amy Edmondson, Novartis Professor of Leadership and Management at Harvard Business School is well known for her work on teams.

In this video she highlights the relationship between Accountability and Psychological Safety and why you need to be paying attention to both!

<https://goo.gl/eXbxXn>



We can show links between her research findings and the challenges and ultimate success the Agile Sales Team behavioural change programme delivered, and the powerful benefits this approach brought for several businesses.

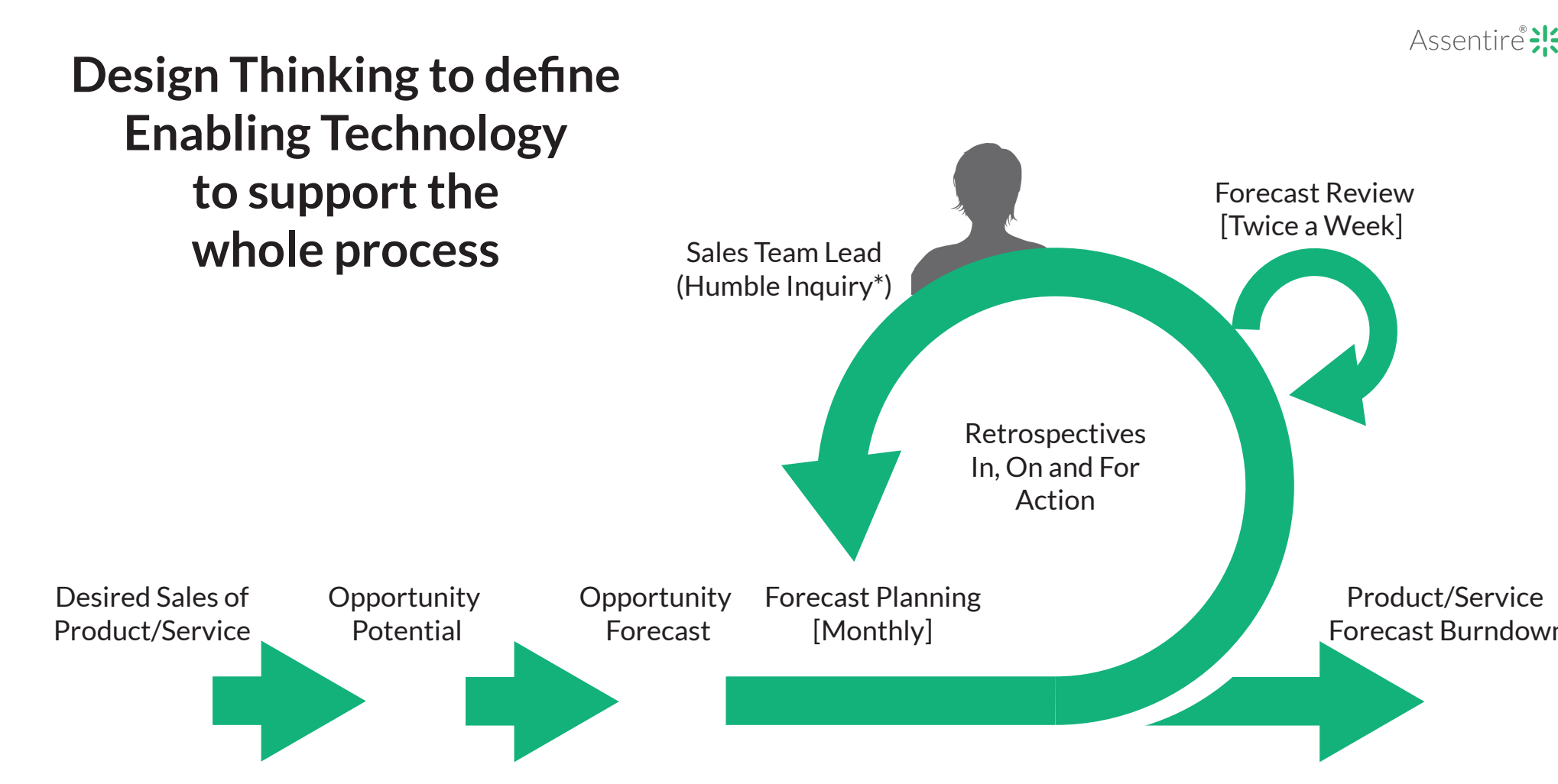
## Practices

With the business landscape changing so rapidly, there comes a point in time when each business realises, 'sandbagging' (a very conservative forecast of value and/or probability of closing the business by a specified date) is quite common across the sales structures, and more importantly, is actually damaging the business.

'Sandbagging' hits every business on the bottom-line; it's a classic hidden cost that many do not want to or do not know how to tackle. Scrum Sales Forecasting enables organisations' to tackle 'Sandbagging' head-on. This is often a core reason that weakens sales forecast accuracy and sales performance.

The cases shared all wanted to reduce 'Sandbagging', enhance accuracy of forecasting and increase the actual sales performance.

### Scrum Sales Forecasting



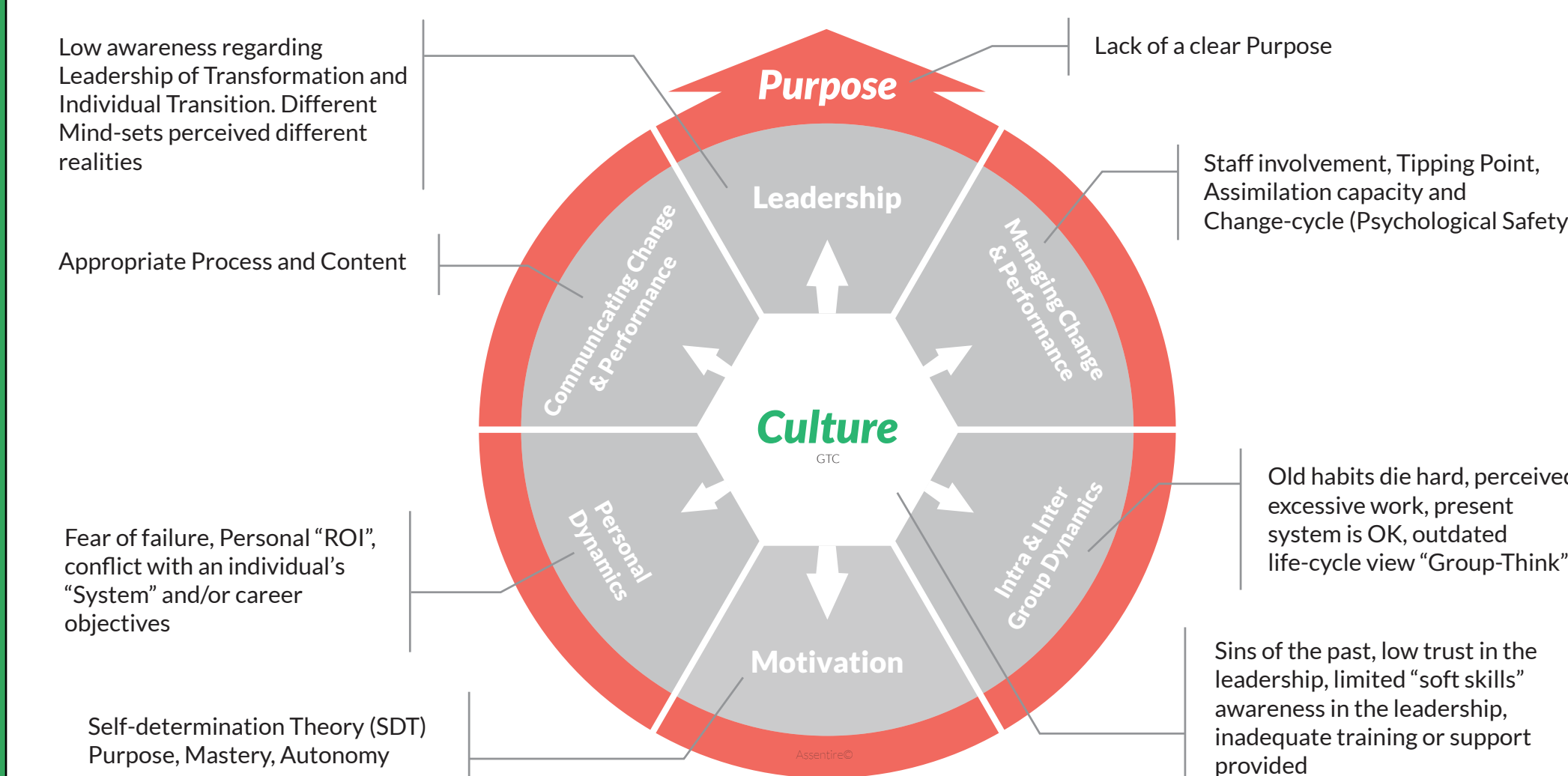
\*Humble Inquiry: The Gentle Art of Asking Instead of Telling by Edgar H. Schein

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## Challenges

Many sales organisations fail to pay attention to fear in the sales structure, in fact for some organisations, it's positively encouraged. 'If you don't hit your target, you're out!' In the days when there were plenty of sales people prepared to live with this style of working, and with the few who seemed to thrive on the challenge, it 'sort of worked'. Just like 'command-and-control', it also 'sort of worked'. We should not forget, we find ourselves here today almost certainly because of these out-dated ways of working! However, in this century we have a new inflection point for many Organisations, Industries and Nations alike.

### What challenges did we experience deploying Scrum Sales Forecasting?



As we experienced the various challenges, we reflected upon what was really going on. The findings from evidence-based research exploring 'Resistance to Change from a Leader's Perspective' identified key issues that need to be understood to enable the projects to be successful. Some issues are shown above, but these are fundamental items that need to be understood.

- The role enabling technology takes
- The impact of the working environment
- The implication of Psychological Safety
- The power of dialogue, and group dynamics
- What really motivates, individually and collectively
- The power of multiple mindsets working together

Each one of these topics is extensive in their own right, and the author has written about many. This is in terms of what the evidence and theory suggest, and how practically one can go about embracing these ideas, to bring about successful change and transformation.

If you want to explore any of these items in more detail, there are many sources and the author is happy to signpost the ones he has used in the past.

## Success Stories

The Scrum Sales Forecasting technique 'maps' directly to the core characteristics of the Scrum framework, so in some respects, you will already know this is a success story. There are two projects that come to mind.

- A service level agreement (SLA) business
- A capital equipment solution business

In the case of the SLA business, the task was to ensure the organisation had the right staffing levels and skill mix to fulfill the commitments made under the SLA's helping further grow the business. The impact Scrum Sales Forecasting had was to reduce staff churn (which is always costly) and as a result, the organisation retained knowledge, both technical as well as client based.

In the case of the capital equipment business, the task was to ensure the organisation had equipment ready to ship in time to meet the clients' needs. Forecasting was a key input into inventory and manufacturing management and revenue projections for shareholders. The impact Scrum Sales Forecasting had was increased client satisfaction, reduced inventory costs and 'problematic' surprises for the shareholders.

## Conclusions

The ideas and beliefs behind the deployment of Scrum Sales Forecasting are quite simple. The majority of people are creative; and want to contribute, are happy to help others when mutual trust and respect has been established. We are also creatures of habit, and when we understand why we wish to establish a particular habit, and that habit is in the interest of all concerned, we will ALL step-up to the challenge willingly. This is a function of aligned Purpose, Mastery and Autonomy.

It's not about Creativity, or Habit, it's about both!

## About the Author

Rod Willis is co-founder of Assentire Ltd, a Facilitation & Coaching company created to bring together, Thinking and Feeling for enhanced organisational performance. He has more than 20 years experience in International Sales Management, providing solutions across the hi-tech sector.

Since 2010 he has followed his passion for Coaching and Behavioural Change, helping individuals, groups and organisation better understand how Collaboration, Mindsets and the Organisational ECO-cycle directly impact actual and future performance, more than many realise.

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