

Adopting Agile Values & Principles



Scott P. Duncan

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A follow-up to *Understanding Agile Values and Principles*

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Foreword

Usually, a Foreword is written by someone other than the author. I did not ask anyone to do this. Some people did offer overall perspectives on the book which I am listing here. Acknowledgements for everyone who offered these statements and more detailed comments on the book follow this Foreword.

"This is a good complement to *Understanding Agile Values and Principles*." - Mike Cohn

"Scott has written a useful and practical guide to making sense of the values and principles of the Manifesto for Agile Software Development. He clearly explains the intent behind the values and principles and challenges readers to find ways to make them real in their own context." - Shane Hastie

"*Adopting Agile Values & Principles* is a thoughtful and insightful examination of Agile beyond frameworks. Scott explores the mindset and philosophy behind Agile adoption, emphasizing 'why' organizations should embrace Agile rather than just 'how' to implement it. Scott emphasizes that successful Agile adoption is about 'cultural transformation', not just process change. He warns against organizations that approach Agile as a checklist rather than a mindset shift, leading to partial or ineffective implementations. Scott challenges readers to rethink Agile as a way of working, rather than a set of prescribed steps. He highlights common pitfalls in Agile adoption, including resistance to change, poor leadership engagement, and reliance on rigid frameworks." - David Gamache, Jr.

"I think I have a pretty good sense of who you're writing for and what you wanted to say, and I think that the book probably meets its targets in both regards. It is well-crafted and hangs together. It says what you want to say, says it well, and is remarkably free of mechanical errors. Again, I feel confident that it hits your goals." - Ron Jeffries

Acknowledgements

I would like to thank the people who read the draft of this book and offered perspectives and/or editorial comments about it:

Mike Cohn

Mike contributed his perspectives on *Understanding Agile Values and Principles*. He offered many useful comments on this book including on the topics of frameworks, industry surveys, and self-organizing vs self-managing.

Mike is the founder of Mountain Goat Software, a consultancy and training firm focused on process and project management. He's also the author of several books on Agile and Scrum, including "User Stories Applied," "Agile Estimating and Planning," and "Succeeding with Agile: Software Development using Scrum". Additionally, Mike is also a co-founder of both the Agile Alliance and the Scrum Alliance.

Mike was also one of my two instructors (with Ken Schwaber) for my initial ScrumMaster certification in 2007.

Shane Hastie

Shane interviewed me as InfoQ's Lead Editor, Culture and Methods, InfoQ Culture Podcast Host in January of 2020 about *Understanding Agile Values and Principles* (<https://www.infoq.com/podcasts/examining-agile-manifesto/>).

Shane is the Global Lead Agile, AI, Business Analysis & Leadership for Skills Development Group. He has been the Director of Agile Learning Programs for ICAgile and then the Director of Community Development supporting the global community of thought leaders, members, instructors, and certification holders. He is an ICF Registered Leadership & Transformation Coach and has a Master in Information Management.

David Gamache, Jr.

I have known David for close to 17 years. He is a seasoned Agile Coach and transformation leader with extensive expertise in Consumer Finance, Banking, and Wealth Management. With nearly 20 years of experience, he has successfully guided global business operations, IT teams, and strategic Agile transformations for both small and large-scale organizations. His work has played a pivotal role in evolving enterprise agility across multiple regions, including EMEA, LATAM, and APAC.

Ron Jeffries

Ron, like Mike Cohn, also contributed his perspective on *Understanding Agile Values and Principles*. He offered substantial comments on this book regarding value he saw in parts of the book and where he encouraged improvements in others.

Ron was the first on-site Extreme Programming (XP) coach, under its creator, Kent Beck, an author of books such as *Extreme Programming Installed* and *The Nature of Software Development*, and one of the 17 original authors of the Agile Manifesto. I was fortunate to first meet Ron in 2004 at the Agile Development Conference.

Linda Westfall

I have known Linda since the 1990's. She is the President of The Westfall Team and Founder of the Software Excellence Academy. For many decades, she has provided clients with training solutions and consulting focused on improving software excellence. She holds many certifications from the American Society for Quality (CSQE, CMQ/OE, CQA and CBA), from the Project Management Institute (PMP), from the Scrum Alliance

(CSM and CSPO), from Scaled Agile, Inc (SPC, SA, SPO/PM and Advanced SM), and a Lean Six Sigma Master Black Belt from Villanova University.

Linda is very active professionally with ASQ (as an ASQ Fellow, an ASQ National Certification Board member, and former chair of ASQ's Software Division along with other Division board positions. (This is where I first met Linda in the '90s and then worked for her from 2005-2007)).

Finally, Linda is the author of The Certified Software Quality Engineer Handbook, 3rd Edition published by ASQ Quality Press, significantly contributed to the 3rd and 4th Editions of the Project Management Institute's (PMI) Project Management Body of Knowledge (PMBOK®) Guide, and worked on the exam development committee for the Professional Engineer (PE) license for Software Engineering. (Linda is a: Professional Engineer (PE) in Software Engineering in the state of Texas.)

Preface

I encountered Agile ideas in 2002 when I read the first edition of *eXtreme Programming Explained* by Kent Beck. When I went to my first conference (ADC 2004 in Salt Lake City), I became convinced I wished to work this way. I did this initially in limited ways because where I worked was not enthused about changing its development approach. A while later, I left to join a small consulting/training firm doing typical software quality training but beginning to offer Agile options to clients. In 2007, I got my Scrum Master certification through a training class given jointly by Ken Schwaber and Mike Cohn. The class was quite large by today's standards – around 75 people.

I mention this to provide a small reference from my own progression which was before interest in Agile crossed into larger organizations years after the Manifesto was written. My Scrum Master class, though large, was still just early adoption though approaching early majority involvement. We were introduced to Agile ideas in those days by the Agile Innovators.

I stated in *Understanding Agile Values and Principles*¹ that limited understanding of the Agile Manifesto's² values and principles contributes to less effective adoption of Agile ideas. I continue to believe such limited understanding prevents people from choosing ways of working that make the values and principles effective for them. Anyone pursuing an Agile approach should think about the implications of the values and principles and do so before committing to any framework.

I originally envisioned calling this follow-up book “Implementing Agile Values and Principles.” I intended to present ideas that would help people in employing each value and principle. The word “Implementing,” however, seemed to suggest a “how to” focus and that wasn’t my intent. I feel the word “adopting” fits better with my intention.

To me, “adopting” means to “accept and assume responsibility for something’s success.” When I looked at definitions of the word “adopt,” one said it meant to “fully accept and actively use a new concept” as a deliberate decision. Therefore, if an organization is going to “adopt” Agile, they need to determine how to deliberately embody the values and principles in the behavior of their organization.

At some point, of course, people must “do” something but there are many ways to choose from in “doing Agile.” Think of this book more as a “why” or a “what” rather than a “how” one. There will be aspects of the latter but without commitment to any specific framework. I am avoiding much “how” commentary because there are numerous books covering all manner of “how” to “do” Agile.

I also avoid much “how” commentary simply because organizations are different in what would work best for them. Without direct contact with organizations, I cannot provide them more than my experiences.

To emphasize “why,” the chapter for each value and principle starts with “why” comments. Then, at the end of each, “What Next” raises some questions for consideration as first steps toward adopting the value or principle.

¹ <https://www.infoq.com/minibooks/Agile-values-principles/>

² <http://Agilemanifesto.org>

Introduction

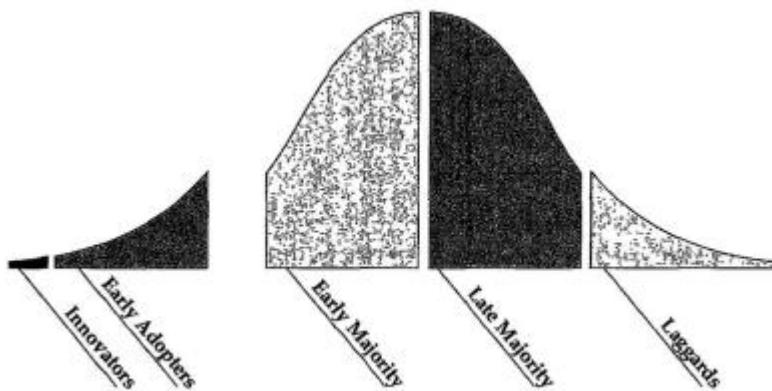
A book's introduction often summarizes the content a reader would expect to encounter in reading the book. In this case, I feel the book's Table of Contents makes that reasonably clear.

Instead, this Introduction starts by listing topics covered in Chapter 1 which are important for the idea of adoption:

1. How "Agile" and "agility," often used interchangeably, differ and sometimes have been misapplied.
2. Distinguishing between "doing" vs "being" and why many organizations often stop at the former.
3. What organizations often expect from adopting an Agile way of working and what I believe are appropriate reasons for pursuing Agile adoption.
4. The common expectation that an Agile adoption will result in "Faster, Cheaper, Better" results.
5. Why frameworks, as the first and only introduction to Agile ideas, might not be successful.
6. How people speak about an Agile "transformation" but really make a "transition."

Following this, the book has four chapters covering each of the four Manifesto values and twelve chapters covering each of the Manifesto's principles separated into three sets focused on customer, management, and team principles,

Some History: From Innovation to “Industrialization”



One way to think of how Agile adoption has evolved comes from this diagram in Geoffrey Moore's book *Crossing the Chasm*³ called the Revised Technology Adoption Curve which has been variously displayed (and interpreted) over the years.

The “chasm” between Early Adopters and Early Majority

is what Moore felt ideas must cross for them to begin to appear in the mainstream.

One article discusses that there is no “chasm” but really a continuum⁴. Despite such questions about the chasm model, and versions of the diagram, I use it here to suggest the kind of thinking, expectations, and behavior I have observed over the years regarding Agile adoption.

Today, more than two decades since the Manifesto's creation, organizations who have been and are still now adopting Agile ideas are in the Late Majority (and perhaps Laggard) category.

Innovators pursue new ideas with enthusiasm for what they see as promising advances. Their support encourages broader adoption because it begins to confirm to others that the ideas do work. The Manifesto authors and their colleagues and co-workers were the Innovators of Agile ideas. They communicated enthusiasm for what they saw those promising advances could offer.

Early adopters understood the potential in Agile ideas, believing in the Agile vision. They did not wait for well-established adoption by others. They were key to introducing ideas to others. They wrote of their experiences and attended the early Agile conferences. I view myself as having been in this category. When I read Beck's book, I immediately recalled a project from the late 70s that I worked on with several developers, a tester, a technical writer, and our marketing representative. We were not doing everything Beck described, but we had weekly group meetings, daily interactions among all the developers, and an environment with continuous integration. I really liked the project and how it felt. Beck's description of XP grabbed me immediately and I started talking to people about it.

The early majority, on the other hand, approached adoption more cautiously feeling new ideas could be passing fads. They waited to see well-established examples of other people adopting ideas before committing. Such ideas were promoted through books, articles in technical journals, and Agile conferences which began to replace traditional ones. Because of this, the Early Majority saw what they needed to begin to pursue Agile

³ https://en.wikipedia.org/wiki/Crossing_the_Chasm

⁴ “It's Not a Chasm; It's a Continuum” by Paula Gray at <https://grayglobalconsulting.com/its-not-a-chasm-its-a-continuum/>.

ideas. Critically, at this point, frameworks and certification programs emerged providing the sense of legitimacy for Agile ideas that the Early Majority sought.

The gap between Early Adopters and the Early Majority is usually considered slow to cross because the Innovator and Early Adopter people and organizations are often much less like Early Majority ones. That dissimilarity meant early experiences did not carry enough legitimacy for the Early Majority.

When Agile ideas began to move into the Early, and certainly Late, Majority, the approach was often to imitate what they believed others were doing or to buy a solution they believed would get them there relatively easily. They may have perceived they were getting left behind. Impatience resulted in some unfortunate Agile adoption behaviors. It also meant that the challenge of making the change in organizational structures, practices, and culture only went part way. They easily fell back to or stalled in prior, more comfortable, ways where the benefits of Agile adoption were realized in limited form.

The Late Majority shared many Early Majority concerns but perhaps could be characterized as less sure how to adopt Agile ideas comfortably. They needed to see substantial legitimacy in Agile practices. Broad training and certification programs were viewed as evidence of such legitimacy. Companies accepted such training and certification programs as necessary external evidence of legitimacy rather than seeking internal understanding of agility.

Once they saw support from well established companies, Late Majority companies would try Agile ideas. With broader and more clearly visible industry support for Agile ideas, their scepticism was reduced. This led or paralleled the rise in more training, framework, and certification efforts. Competition between these efforts in the marketplace was visible. Thousands of people now attended Agile conferences leading to attendees bringing Agile ideas back to Late Majority companies. Interestingly, as Late Majority involvement grew, most of the Innovators stopped coming to these events, except as invited guests. This may have been because they felt the way Agile ideas had become commercialized did not appeal to them.

Finally, Laggards may only adopt Agile ideas when they see almost everyone else has done so. However, Agile ideas may challenge Laggards to make too many changes, and they may never pursue those ideas.

What I now observe through working with companies and individuals are several understandings necessary to fully successful Agile adoption. As noted earlier, Chapter 1 will address six key ones.

Unfortunately, in the past year, Late Majority companies have begun to back off on many aspects of Agile thinking. There seems to have been growing discouragement and scepticism regarding what Agile has delivered (or failed to). Large, formal framework adherence, though, has continued perhaps because it has ingrained itself in organizations so significantly that pulling back from it could be very disruptive.