

**Evaluating Individual Contributors Performance in Agile Teams**  
**The PITA Principle**

SIUE PM Symposium

**SOUTHERN ILLINOIS UNIVERSITY**  
**EDWARDSVILLE**





# WELCOME.

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# Level Setting

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Who is in the Room?

- Who are Managers who work with Agile Teams?
- Who are Managers who work with Waterfall teams?
- Who is in Scrum Master, Agile Coach or Release Train Engineer roles?
- Who is in Project Manager Roles?



Housekeeping

- While our conversation will focus on Agile, the topics we discuss can be easily modified to work with any methodology related to leading people.
- Ask questions at any time.

# Adapting to Agile

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Typical issues encountered by Managers transitioning to Agile;

1. Resistance to Change
2. Cultural Shift
3. Lack of Understanding
4. Change in Roles
5. Project Prioritization
6. Measuring Success
7. Sprint Planning Challenges
8. Resource Allocation
9. Managing Distributed Teams
10. Scaling Agile



# Hidden Agile Transition Issues

- There are a series of issues during the transition to Agile that do not get as much attention because they do not directly impact the agile team. These issues are specific to those Managers who have team members reporting to them. These can include:
  - Understanding and Explaining Adaptive Planning
  - Shifting to Facilitator and Coach Role
  - Understanding and Explaining Team Performance Metrics
  - **Evaluating Individual Performance within Agile Teams**



# The Song Remains the Same

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Agile transitions, even with the shift in focus to team performance, do not eliminate the need of Managers to evaluate an individuals' performance. Managers still need to:

- Make informed decisions on organizational resource requirements
- Make recommendations for promotions and new positions
- Provide input as part of bonus and merit pay increases
- Mentor and guide employees on professional growth and career path
- Provide Performance Reviews

How do Managers perform any of the above, if they believe they are only seeing a partial picture of a person's performance?

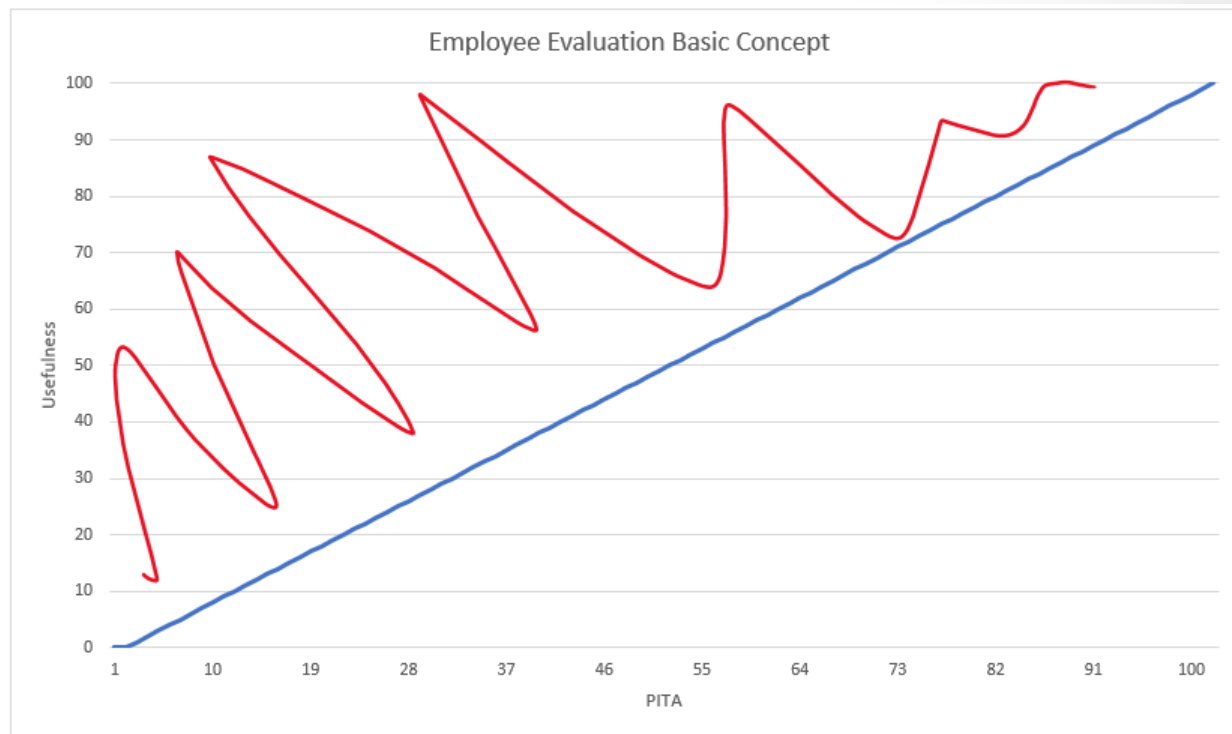
# Contributing Elements

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There are many reasons Managers feel evaluating individual's performances is more difficult;

- Increased focus and reliance on team performance and metrics
- Empowered teams
- Teams will likely try to self police bad behavior before bringing issue to a manager
- Managers are less involved in key decision making
- Psychological safety may make members reluctant to discuss team business with managers
- Managers may be excluded from key ceremonies like Retrospectives

# The PITA Principle





# Every Team is Different

Every team is going to operate differently and value different characteristics for their team members. This shared combination of desired values must be understood to help the team move forward and thrive.



# Embracing Agile Principles

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To solve the dilemma of evaluating team members when there appears to be only part of the picture, Managers need to lean into the Agile state of mind:

- Empower the Team – Recruit the team to help determine the criteria on which their performance review will be conducted
  - Leverage the team’s shared combination of desired values
- Determine the level of psychologic safety on the current team and tailor the collection method to match
  - Self-Reporting, anonymous 360 peer review, team member interview or a combination of all methods can be used to gather the necessary data
- Leverage Team Charters to create and solidify agreements with the team to enhance buy-in
- Create transparency in the process to increase trust/credibility with the team

## Leveraging the Agile Team

- Once the Agile Team is onboard with the concept, the team will assist in building out the criteria. The team should select criteria that they collectively agree is most important for each team member to possess that allows them to contribute to the team being high functioning.
- Each team member is scored on a 10 scale for each of the selected criteria. This will use the agreed upon method to collect the scores.



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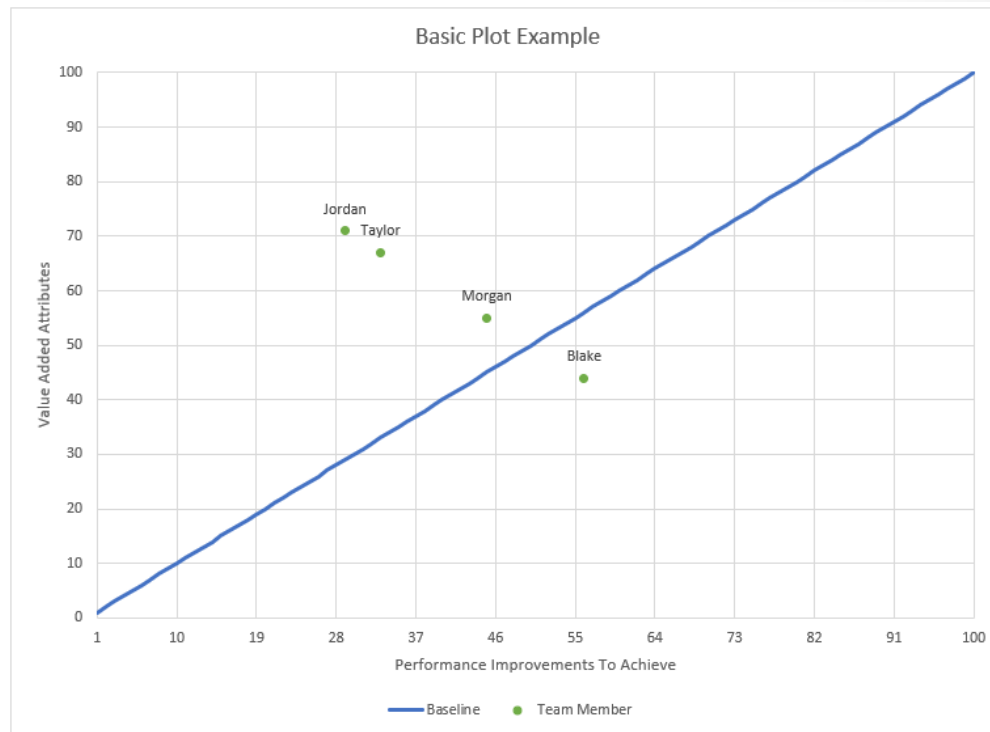
# Creating Plot Points

If our team selected the below criteria and we used a 10 scale rating system, we would be able to plot each team member along a Value Added Attribute Axis and a Performance Improvement To Achieve Axis.

- Integrity
- Communication
- Technical Ability
- Leadership / Mentorship
- Team Player
- Emotional Intelligence
- Hustle / Self Directed
- Innovation
- Failure Recovery
- Utility

Team Member	Taylor		
	Value Added Attribute Score	Experience Modifier	Remainder
Integrity	8		2
Communication	9		1
Technical Ability	6		4
Leadership / Mentorship	6		4
Team Player	7		3
Psychological Safety / EQ	8		2
Hustle / Self Directed	4		6
Innovation	5		5
Failure Recovery	7		3
Utility	7		3
Plot	VAA Axis 67	PITA Axis 33	

# Basic Plotting Example

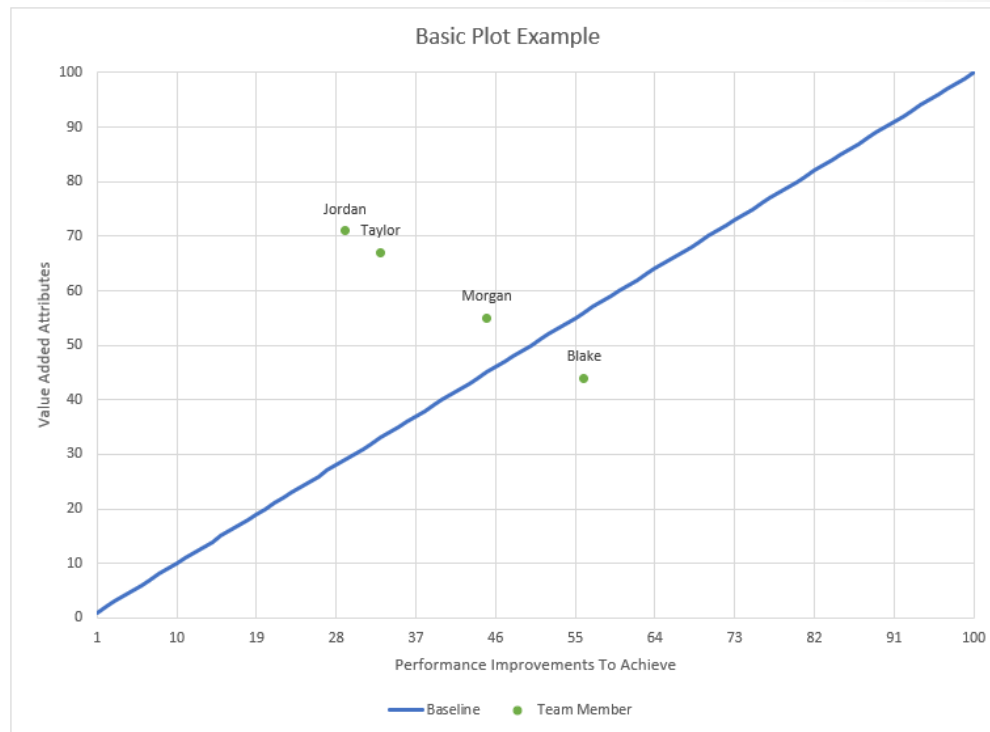


# Experience Based Calculation Adjustments

When using a fixed set of criteria to judge team members, there needs to be an adjustment made for level of experience. The expectation placed on junior and senior is different, and by using an experienced based modifier that decays over time, it will allow us to plot the employees using the same criteria.

Team Member	Jordan		
	Value Added Attribute Score	Experience Modifier	Remainder
Integriy	8	0	2
Communication	6	3	1
Technical Ability	3	3	4
Leadership / Mentorship	3	3	4
Team Player	6	3	1
Psychological Safety / EQ	5	3	2
Hustle / Self Directed	3	3	4
Innovation	2	3	5
Failure Recovery	4	3	3
Utility	4	3	3
Plot	VAA Axis	PITA Axis	
	71	29	

# Basic Plotting Example



# Position Based Baseline Adjustments

- All positions are not created equally. While some positions are difficult to fill, others have rapid turnover and a steady stream of new candidates from which to choose. Factors like market saturation, difficulty in hiring replacements, ramp-up time and cost will all impact how you will likely evaluate an employee.
- The existing baseline assumes that you are evaluating all employees from jobs that have similar ability to replace, but what about those positions where it is very difficult to replace?

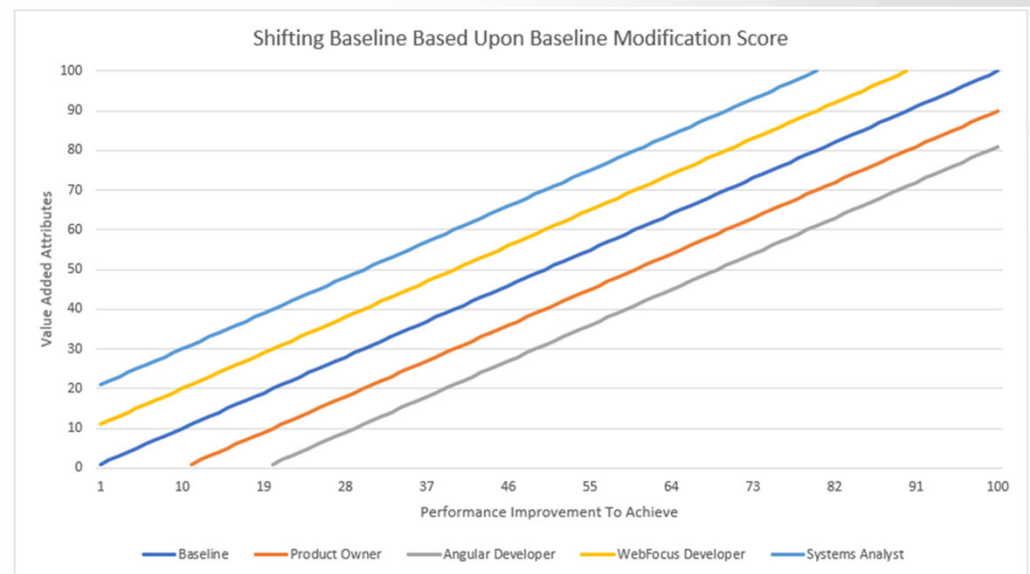
Baseline Modifications	
Specialized Certifications (Required = +1, Nice to Have = 0, No Certifications Exist or not a hiring factor = -1)	-1
Market Saturation (Extreme Lack of Talent = +1, Average Availability = 0, Very Saturated = -1)	1
Time to Train (Costly Investment = +1, Average Investment = 0, Negligible = -1)	0
Time to Hire/Replace (Slow/burdensome = +1, Average Process = 0, Quick and Easy = -1)	-1
Position Cost (High Cost Senior Position = +1, Average Cost Middle Experience = 0, Junior/Entry Level Position = -1)	-1
Baseline Modification Score	-1

Formula arrives at a number between -2 and +2 which then converts to a shift in the direction of the baseline when plotting VAA and PITA.

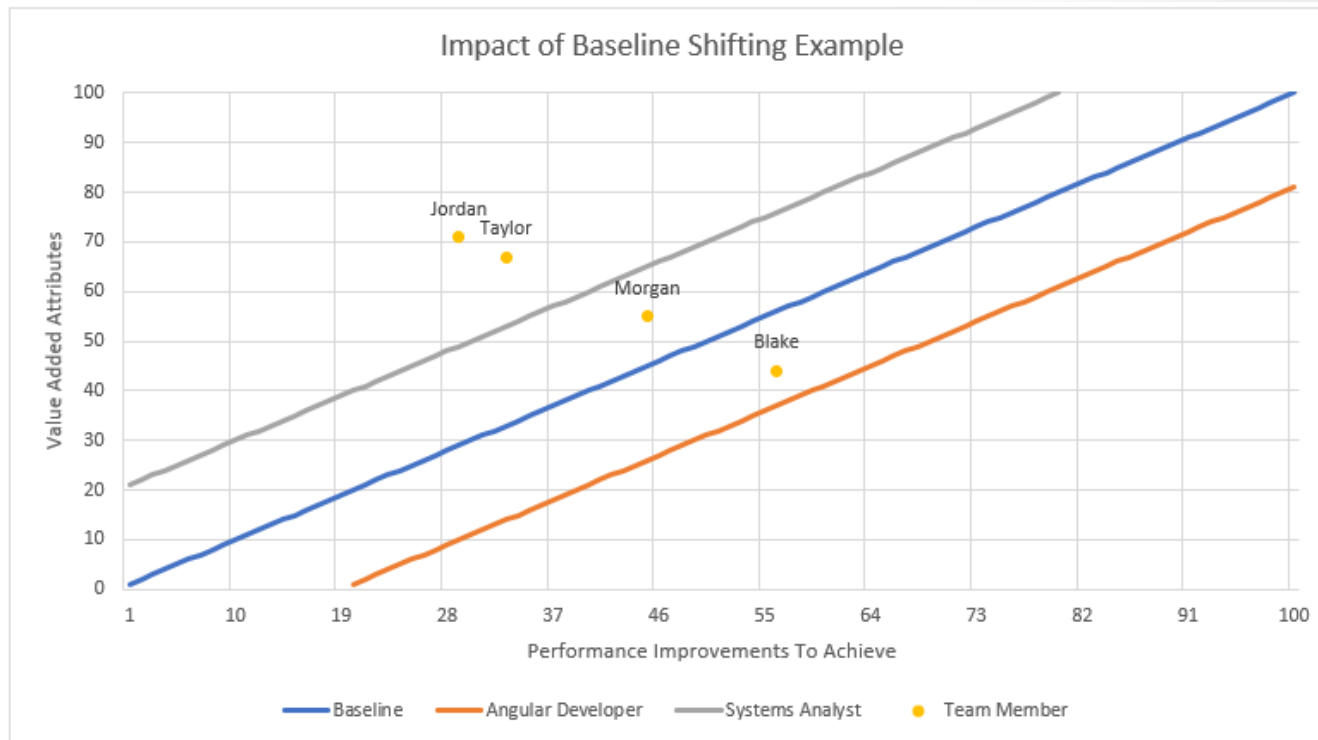


# How Baseline Modification Impacts Scoring

0	-1	-2	1	2
Baseline	Product Owner	Angular Developer	WebFocus Developer	Systems Analyst
1			11	21
2			12	22
3			13	23
4			14	24
5			15	25
6			16	26
7			17	27
8			18	28
9			19	29
10			20	30
11	1		21	31
12	2		22	32
13	3		23	33
14	4		24	34
15	5		25	35
16	6		26	36
17	7		27	37
18	8		28	38
19	9		29	39
20	10	1	30	40
21	11	2	31	41
22	12	3	32	42



# Baseline Shifting Plotting Example



# Variation on Scoring Methods

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There are various ways to customize this scoring model to make it a better fit for your organization:

- Include Product Owner, Scrum Master and Agile Coaches in scoring the team. These could be a weighted score and might be helpful for newer teams where teams are new to challenging each other.
- Team could decide to weight some criteria higher than others.
- Instead of using the remainder of the score you can create a secondary list of criteria that hold the team members back and have the team score themselves against that list to determine the Performance Improvement to Achieve axis.
- Replace one of the criteria with a team performance score that applies to everyone equally on the team.

# Shifting to a Mentor/Coach Mindset

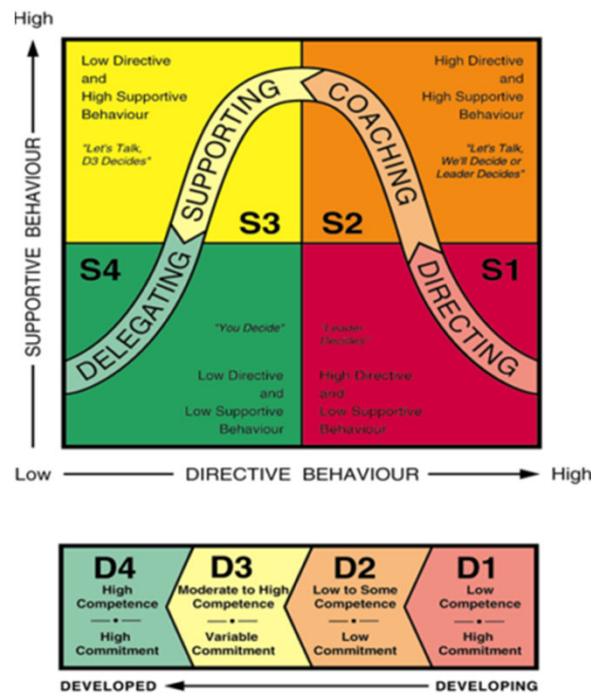
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- One of the primary challenges for Managers in Agile transitions is beginning the process of shifting away from directing work to directing team member growth. It is vital that the Manager embraces the role of Mentor and Coach in a way that complements the support being provided by team members, Scrum Masters and Agile Coaches.
- Team members, Scrum Masters and Agile Coaches are likely to approach problem solving from a team perspective. As a Manager you remain an advocate for the individual team member and seek to help them unlock their personal capability that makes the team better.

# Recognizing Opportunities for Growth

Team Member	Krishna		
	Value Added Attribute Score	Experience Modifier	Remainder
Integriy	8	0	2
Communication	6	3	1
Technical Ability	3	3	4
Leadership / Mentorship	3	3	4
Team Player	6	3	1
Psychological Safety / EQ	5	3	2
Hustle / Self Directed	3	3	4
Innovation	2	3	5
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Plot	VAA Axis	PITA Axis	
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# Situational Mentorship Model



- Situational Leadership Model can be applied to mentoring employees to target Performance Improvements To Achieve areas of concern.
  - S1 Phase – Performance Improvement Plan created by Manager with input. Manager teaches employee how to identify areas for improvement.
  - S2 Phase – Team member works in collaboration with Manager to create Performance Improvement Plan and identify areas for improvement.
  - S3 Phase – Performance Improvement Plan created by Team Member and reviewed by Manager.
  - S4 Phase – Performance Improvement Plan created by Team Member and Manager provides mentorship support.

## Utilizing Various Existing Programs

- Clifton Strengths – Helping your team members identify their specific strengths and learn how to leverage them most effectivity.
- DISC – A model to help individuals understand their personality and better navigate their working relationships.
- Creating a Performance Roadmaps – Working with the individual to craft skill improvement milestones and regular check-ins for frequent adjustments to the plan.



# Final Take Aways

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- Teams and Individuals are different which makes crafting employee evaluation solutions difficult.
- In Agile Organizations empowering the teams by giving them a seat at the table in how they are evaluated will ensure buy-in to the process and allow teams to pursue becoming a highly functioning team in the method that works the best for the team.
- By including the team in the review process, this can help transform it into a peer review which allows a more complete picture of the employee to be built.
- Managers need to focus on directing growth of their employees, but one size fit all methods are unlikely to yield good coaching and mentorship opportunities.



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# Questions

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