— [Announcer] You're listening to the "HR Mixtape" Your podcast with the perfect mix of practical advice, thought-provoking interviews, and stories that just hit different, so that work doesn't have to feel, well, like work. Now your host, Shari Simpson.

— Joining me today is Melissa Thompson, Manager of Organizational Development at Paylocity. Melissa is an HR Agile practitioner, certified Scrum Master, and SHRM certified professional with over 15 years in human resources. Her goal is to help others understand the value of lean process in the HR space. In addition to her work commitments, Melissa also serves on the board for Prosper Ladies Association, a 501C3 supporting the underprivileged children in the Prosper School district. Melissa also serves as a member on the events committee at our company's women's employee resource group. Whether it be in a work or personal atmosphere, Melissa is an agent for change and encourages an agile way of looking at daily activities. Hey Melissa, thanks for jumping on the podcast with me today.

— Hi, Shari.

— So we both work in a tech company and we are surrounded by Agile methodology, I feel like, every step of the way, but I think that this topic, in relation to HR, is so fascinating, and you have this really crazy awesome, robust experience in this space. So I wanna talk about Agile methodology in HR. So let's start there. Can you provide maybe an overview of what Agile is and then how do you see it applied to HR?

— Agile for me is just a way to do work a little bit differently, and it's thinking about a project and breaking it into phases or different steps, and bringing leadership or your stakeholders along the way. So, versus going from start to end, thinking you got it all right. It's like checking in, "Do I have it right? Let me adjust, let me check." Go back again and again until you're finished. I like that it, I think it works well in HR. A lot of people think that it's an IT concept, that it's only for people that are producing something. If you're making a car, this is a good thing to do, but we have projects all the time in HR. So I know you and I know that we're always going to leadership, and it's just a different way about going to them and getting a response back faster.

— It was an interesting lesson that I had to learn, moving into our organization. I had always worked for companies that expected what you just said before, like the start-to-finish, tied up in a bow, here's your program, with very little iteration or input from, you know, either leadership, stakeholders, or those that aren't gonna have to experience the program in general. So I think this move to a more agile methodology when we think about HR is a huge. As you've thought about this in the HR space, how can it actually help us become more efficient and effective? Because I could see somebody listening, saying, "Yeah, okay, but if I have to do all this iteration, I have to

go back for all this feedback, it's gonna slow everything down."

— My point back to them, our conversation back to them would be, you have to do that anyway. So when you go from start to end, even at one company we wrote how many times we had to do the PowerPoint over, and we were like in the 90s.

— Wow.

— And so I don't think that you're necessarily gonna be less in the 90s, but you will get more feedback sooner than going further down the line. If you think about three hours, how you spend on something just to flip it, it's like you're kinda frustrated a little bit. So when you think about Agile, for me, it gives me freedom. I can iterate, I can comment back, I can get feedback, I can change it into something a little bit more valuable that I wouldn't say I had the opportunity to do when I went to the end just to find out it's nothing close to what they wanted. So that's the freedom in it.

— Can you walk me through start to finish? But that might be too lengthy of a question.

— Yeah.

— Maybe little itty bitty, you know, if somebody's listening like, "Yeah, okay, how does this actually work?" Walk me through what a process looks like if I'm gonna use Agile, compared to what I've been doing before from, you know, kind of like, as I start to think about it, to when I'm gonna give that first deliverable, you know, what are some examples of that Agile methodology of doing it? I mean, obviously there's some words out there, right? Sprints and Kanban, and all that kinda stuff, which I don't know if we need to get too deep into that but maybe walk them through what that looks like.

— Okay, yeah. And I'll give you, before I start, just a little breakdown. So, Agile methodology is a way of doing things. You got Scrum, you got Six Sigma, you got regular project management, and all of those are individual ways of doing it. I happen to be a Scrum master, so I am certified and trained in how to do the Scrum approach, and I'll give an example for that. So we have this project, they said, "Hey, we wanna do performance management, we wanna change it up by the end of the year." Scrum and Agile thinking says that I can come to you with just a stick figure or some notes, to say, "This is what I'm thinking. Do you agree?" And leaders get to go, "Yeah, I like that, but I really think it needs to include this step," way before I start the project or the presentation. So it's like I'm checking in, "Are you okay with this approach?" Come back again two weeks later. "What about this timeline? Are you okay with this?" "No, I think it should be this date. I think we should start on that date." So it really allows freedom and flexibility along the way. And it's just as simple

as understanding that you're not gonna come to them perfect. You're gonna come to them with some ideas, you want their feedback, and then you're gonna go back and forth from there. Normally happens within two weeks this could happen every week. So that's where the flexibility is, where I don't want HR people to think they must follow all of the rules.

— If you're listening and you're like, "Yes, yes, and I love all these things, I wanna do this more." There's two questions to that, is a follow up. You know, what, no, so I'll start with this. What challenges do HR departments typically face when they wanna go down this road of implementing Agile? How do they start? Because that could be a lot for a leader, right? If a leader is used to fully-developed thoughts, ideas, projects, how do you make that switch to this iterative approach?

— Top for me is always gonna be psychological safety and trust. So leaders have to know that if you're coming to them with something half-baked, that they trust you enough to know when they finish it, it's gonna be good, right? So we don't want you stuck into the wording, we don't want you stuck into, "You didn't add a period." Is the thought process there and do you trust them to know all the good and all the bad. The other thing is with the psychological safety, are you open enough to be vulnerable to say, "I don't have the answer, I'm coming to you because I'm stuck"? Versus just thinking it through and not just showing that part of you that's unsure. Having that safe space to talk. If you get feedback back from your leader, not to take offense to it, that we all have the end goal in mind. That, to me, stops a lot of organizations because we gotta get to just being human, being vulnerable. That's hard to do.

— Yeah, absolutely. You've had such a, you had a nugget of that I wanna pull out from what you just said. And it has to do with that conversation that you can have with your leader in advance of moving down this process. So you can start your project by saying like, "Hey, I actually wanna take a different approach this time and managing this assignment you gave me, I wanna use an Agile approach. Here's what that means. It means that I'm gonna get 12 meetings on your calendar and here's gonna be the expectation of out of those 12 meetings. And the first one is literally just gonna be you reacting, right?" So kinda setting that stage in advance, like, "I'm not gonna bring you a fully-baked project," you know? So that there isn't confusion when you come into that room and you're asking for the feedback, and you're not showing up the way that the leader is used to you showing up. So I think that's one thing from a person who could be delivering against an Agile methodology. As you think about this from a leader's perspective, introducing this to their staff, what are some of the things that come to mind for you that the leader's gonna have to overcome when teaching their staff or their employees this new way of approaching projects?

– Yeah, I think they're just gonna have to overcome the fact that people are gonna be apprehensive at first. So it may seem uncomfortable. It may seem that you're not getting the level of interaction that you want. That comes with time. So, that's building up the culture, building up the environment of trust, and just always, continuously reiterating that point, like, "Hey, it's okay to fail. We're gonna fail fast, we're gonna fail forward. I don't see that as a knock. You're not gonna get some mark on your performance management tool that we had a bumpy start to this." That would be the biggest challenge from the leader perspective, is just making sure that that environment is safe. Which with Scrum, you can bring in a Scrum master. So we're indifferent, right? We're not a leader, we're not part of the team, we're there to navigate that rough space, but even a leader could make that space safe as well.

– For sure. And I love the idea of, you know, hiring a consultant if you need to. I think sometimes we forget that there are really unique consultants out there, right? There's Scrum masters who, like you said, can come in and be a little agnostic of what's happening from a cultural perspective. You know, I think that this approach, an Agile methodology approach, actually has a lot of positive consequences for the HR team. But I'd love if you could share how do you see switching to an Agile methodology actually improves employee experience?

– Yeah, I can go. For me personally, when we first did it, of course I was apprehensive. Shout out to Jeff. So he was one of my managers that said, "Hey, let's try it." And for me I thought, "Well, you're micromanaging me, so now you're checking in with me every day. You want me to tell you what I'm doing?" So I had the complete opposite approach but I gave it a chance. And for me, I was actually able to show how much I did do and I literally automated myself outta my role, which is excellent, because I did a good job, and I was able to go on something else. So at first it looks and feels a certain way, but it's really empowering. You could say, "I'm done, I need more work," and that's an awesome thing to say, or "I need some help." And then the rest of your team is like, "All right, all hands on deck. We gotta help Melissa today for two hours." It's just that open way of getting things done. End of the day, you're happy, right? You didn't have the stress, you didn't go all the way down the road just to figure out like you were in the wrong car at the wrong speed. It's just a good feeling overall. But it takes time though.

– Yeah, for sure. It takes time. Yeah. When I embraced this in my career I had a very similar start where I was like, "Why are you all up in my business?" Like, yeah, like, "This is a lot." But I quickly realized that it really gave me an opportunity to get feedback so much sooner. And as a HR business partner, I finally felt like I was getting the time I needed with that business leader to get to the nuggets of truth, the nuggets of things that they—

— Right.

— Really wanted to see. And sometimes when you are in presentation mode, right? When you're going in with your full deck, you don't have that same opportunity. And let's be frank, not all the time your leader is paying attention if you're presenting that way.

— Yeah. You brought up a really good point that I forgot to bring up. So when you're coming to leaders so often, you don't spend as much time getting them up to speed. So, versus when you first present, they're like, "What is this?" And you spend a good 15 minutes saying, "Hey, remember when." If you do it this way, or at least attempt to do it, quick studies, they're like, "Oh yeah, I totally remember, now we're at this point." And so it actually kind of goes better. Feels like you're having more meetings, but you're not, you're having productive quality meetings because everybody's always on the same page. So, forgot, you brought that up.

— Nobody wants just more meetings. That's something—

— No, no, no. Not for the wrong reason.

— You know, how has Agile helped HR departments adapt to change quickly?

— It requires us to be flexible. Like, you're doing, you're checking, you're adjusting, you're being okay with the fact that it has turned, and you're also able to see the progress. So even though it feels like you've changed directions, when you measure it, you're actually moving things along pretty smoothly. And you've also had the opportunity to make it even better versus let's just get it done. Getting it done, it's great, but we got it done and we improved it, and we saved time or, and somebody else doesn't have to be on this project anymore, is like some wins. And those are good things. So it's really great for HR. I think we're always challenged to be a strategic thought partner. Our businesses are already using this methodology and there's no reason why we can't use this in some of the things that we do.

— Yeah, absolutely. Another point I'll add is, if you're thinking about, you brought it up earlier, but if you're thinking about tracking your work, you know how many of us get to that annual performance review and there's that accomplishments box and you're like, "All right, what did I accomplish?" You know, you go recency air, right? So you go like the last three months, it's really easy to figure out, and then you're like, "Okay, but what did I do for the nine months before that?" And so then you go, you look through your calendar, you look through your emails, you look through some of your notes. If you've got this way of tracking your work through an Agile way of looking at it, you've got some really good data on everything

that you worked on. And like you said, it might not have ended in a fully-baked process, a fully baked-program of whatever the end result is. That doesn't mean you didn't do the work, right? And so—

– Right.

– It gives you the ability—

– Absolutely.

– To track against that. I really love that. You know, when you think about implementing Agile, how has that changed the culture of an HR department in general? How have you seen that either positively or negatively affect and impact an HR department?

– Yeah, I'll go negative first. I feel like you just have to start, right? So when there's not full adoption, it's weird. So you have some people that are bought in, some people that are not, that creates a weird space. On the positive side, when everybody is open, and we've agreed to the values and we have a trustful and open space, it's amazing. Like, you end the meetings laughing, or you do a reflection session, which is important, at the end. Like you're saying, "If you don't finish, great, but what did you learn? What did you do? What can you do differently? How did you feel?" That's super important. You can, and at these meetings you can say, "Yeah, this was terrible. I felt terrible." Or, "I really felt empowered. I'm really happy when you asked me to do X, Y, and Z." Those are the elements to team building. And I can't quote any team building methodologies but I'm like, you gotta have the trust, you gotta have the camaraderie. It's kind of built in when you think of doing work this way.

– When you think about getting HR professionals up to speed, what are the skills and capabilities they need to execute in this way?

– They have all the skills that you need. A lot of times you think you need some special training or certification, which I think is great, but you really don't. You probably need one person that knows how to do it correctly. And a lot of people that are willing to try and open enough to fall flat on their face when it doesn't go right, because that is what Agile is. So I just need participating people to give it a chance, and then we go for it.

– And just leaning back into that psychological safety, so much of the work that we do in HR is teaching managers how to create these environments. But we also remember we're employees too, right? We have our own supervisors and the own complexities of being people working with people all day, right? And so you add all of that on, it's like we have to build our own psychological safety within our teams to be able to do this. And I love the idea in that retro of being able to just be honest and say, "This felt yucky. The part of this project

felt yucky. And I either didn't feel heard, or I felt like my ideas weren't aligning with what we were trying to do." And/or the opposite, right? Vice versa, is like, "You know what? You asked me to do that one thing and I never thought I would like that part of the project and it was super impactful for me, and I learned a new skill, and all that stuff." So I think there's so many things that you can pull away when you start to kinda shift your mindset on how you think about how we work in HR, and the stories we tell ourselves as to, "Well, we're not tech, we can't work that way." You can, you can, you just have to figure out—

— You can.

— how it works. Yeah.

— Yeah.

— For organizations that are considering adopting this, you know, do you have maybe five steps? You know, one, this is where you begin, and this is how you implement to get the team ready to make that transition. You know, we talked obviously psychological safety and being open, but what are some tactical steps they can take?

— Tactical steps? I would say that, figure out what you wanna do. So, Agile methodology, to me, is a mindset. So you could do that, you can do that at home. I would ask them to, like, are you leaning towards, you know, Six Sigma? Are you leaning towards Scrum? Are you leaning towards just a different way of doing project management? And then maybe find a system or a rhythm that works for you so that outside of the whole cultural, psychological aspect, next is how do you do it? You know, what are your norms that you're gonna do? What system or not? 'Cause you don't have to use the system that you wanna use, to be successful, and then stick to that. You know, make some adjustments within the project, but kind of stick to whatever your core goals are or your values. That's foundational, I would say, for me and for other people.

— So as we wrap our discussion and somebody might wanna go into this a little bit deeper, obviously there's a ton of resources on Agile itself, but I know that there is some documentation about some big-name companies that use Agile methodology. Maybe you could just elaborate on a couple of those so that, as people wanna dig into this a little bit deeper, they know where to look at.

— Yeah, for sure. For me, what was most inspirational is just learning about Scrum. So that is created by Jeff Sutherland, sorry, I might be saying that wrong. He referred a lot to companies like Amazon, Zappos. Of course, your manufacturing companies are gonna be top-of-mind when you think about how they think about things. But for HR professionals it's not about that, it's about how can you use that methodology to

take it to your back office. So that's where I would lean in a little
bit to some of the tech companies to see how they they've implemented,
you know, either Scrum, Agile, or just different Agile methodologies
within their organization.

– Melissa, such great advice and a really important topic for us to
think about in the HR space as we continue to evolve ourselves, right?
Into a more modern business partner. And being Agile is just one of
the ways we can do that. So thanks for bringing this insight to us
today.

– Thank you. Good talking to you.

– [Announcer] I hope you enjoy today's episode. You can find at
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