

## THE EDGE



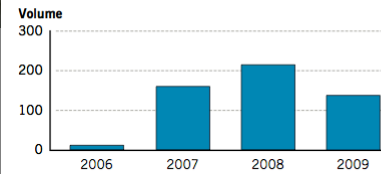
the edge

- where life diversity is the greatest
- where I was pushed emotionally and physically last year
- I was frustrated about my work, that it was so hard to help organizations fully achieve the excellence they should
- death and drama around me
- and oh yeah, I almost died!



In 2009, robotic surgery for isolated mitral valve repair *reduced length of stay by 43 percent* compared with traditional nonrobotic surgical techniques.

Robotic Mitral Valve Repairs Volume



In 2009, we performed 137 robotic mitral valve repairs with a greater than 99 percent success rate.

### 0% Mortality

The mortality rate for robotically assisted valve surgeries was 0 percent in 2009.



But believe it or not, the heart surgery for me was not a big deal. this was not my scare with death. I knew the statistics for the heart surgery (mitral valve repair) I was having --- and the results had been very good (0% mortality was a very meaningful measure to me!) The Surgeon had done this lots of times! I had the best in the world. This was also meaningful. So, yes, my heart was stopped for long time, and they poked around in there, etc, but I was confident. And I was visiting a starbucks within 36 hours of surgery.

(full story at [http://web.me.com/oxseeker/Alans\\_Status/Blog/Blog.html](http://web.me.com/oxseeker/Alans_Status/Blog/Blog.html) )

*“I thought it would never end”*

It was months later that I realized that I had almost died.

- It wasn't the surgery.
- I was watching a program on TV about football players that lost all the millions they made
- One person said “I thought it would never end”
- This hit me between the eyes and sat me right down
- If I had missed my Doctor appointment and missed the problem with my mitral valve, death was likely
- I realized that it was time to rethink my journey



I had this title for this talk for a while. What the talk track was originally going to be was 100 hints and tips to Coach teams better.

But as I prepared, It became transformed.... to be about the journey of mastery that I myself was working.

I am interested in helping people, teams and organizations master the journey of excellence.  
I would be thrilled to see whole organizations transformed. I would love to be part of that.

I deeply care about this. I really do want to see people with a fire in their eye, where they are actively owning their own journey of excellence.

Yet, I have also actively worked at being detached from this outcome to instead focus on my own process at helping others.

This is my story about this journey thus far.  
I hope others can find value in it.

## MILESTONES IN A JOURNEY

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- A Beginning
- Practice the Fundamentals
- Learn and Improve
- Make Measures Meaningful
- Push The Edge of Personal Performance



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The talk centers around these milestones in my journey of working on introducing Excellence into organizations. It centers around my coaching of teams and organizations in the Team Software Process. Every project I do has been an opportunity not to just do something meaningful, but to learn and improve myself. So this is also my own journey of learning about myself.

## A BEGINNING

### IF YOU WANT TO IMPROVE...

- PSP's sole purpose is to help you improve your software engineering skills. It is a powerful tool that you can use in many ways. For example, it will help you manage your work, assess your talents, and build your skills. It can help you to make better plans, to precisely track your performance, and to measure the quality of your products. Whether you design programs, develop requirements, write documentation, or maintain existing software, the PSP can help you to do better work.
- Humphrey, Watts S. (2005-03-03). PSP(sm): A Self-Improvement Process for Software Engineers (Kindle Locations 447-451). Addison-Wesley Professional. Kindle Edition.



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I took the Personal Software Process course about 14 years ago.

The course was amazing. I wrote the software programs. I recorded and analyzed all my data.

I was startled by my data. I couldn't believe how many mistakes I made in writing the code, how many defects I injected.

It made me realize that I had some bad practices in my own discipline in writing software.

I found it depressing until I came to a stunning blinding flash of the obvious...

?? Miles to Mastery

**I CAN IMPROVE**

I can improve.

And with PSP I can make changes with a predictive improvement

I Can Measure

I can Prove it with Data!

AND I DID

I used defect prevention techniques and actually cut my defects injected in 1/2.

I decreased my rework by 60% and increased my rate by almost 2x.

I could contribute.

Yet even more importantly - I DID IMPROVE.

And it had started on my ownership of my journey, my quest for mastery.

## Before GQM - What Learning Can I apply?

- Deming -- Good, Fast, Inexpensive -- you can have all 3 through a focus on quality (plus of course the Deming points of management)
- Margaret Wheatley (Leadership and the New Science)-- immerse yourself into data out of it emerges patterns You can't control data points, but you can influence the overall system
- Daniel Quinn (Ishamel, and other books) -- There is no one right way. The wrong way is one that doesn't work for you (or your community or your culture...)
- Tich Naht Hahn (Zen teachings) --- Present Moment, Wonderful Moment.
- Covey (the 7 Habits guy) -- Slow is Faster.
- CMM - level 5 -- the beginning.
- M Scott Peck (The Road Less Traveled) On community building --- do things completely, don't try to work until all the relationships are clear, and complete, no matter how painful go to the bottom and develop an understanding
- Janice Kim (Go Master) --- From a good opening you can lose, from a bad opening you cannot win.
- Alan Willett -- when in doubt about the next move, make the most beautiful one.
- Feynmen -- something doesn't look quite right here
- Luther Standing Bear (Lakota Chief 1800s) - I walk in beauty and harmony with every step

This slide is a from a presentation I did after I completed the PSP Course.

I had been doing studying of various gurus on the subject of mastery.

This course brought it all together for me.

It started my own journey towards my thinking of helping organizations change.

I had no idea how many miles to mastery I had to go.



## PRACTICE THE FUNDAMENTALS

10 Miles to Mastery

With each team, help them

- Do TSP launches
- Do TSP Checkpoints
- Collect historical data
- Do project and cycle Post-mortems
- Learn and improve



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I became authorized to Coach teams with the Team Software Process.

I did many TSP Launches, checkpoints, retrospectives, individual coaching, and management coaching.

My teams were getting good results, but I found that it wasn't "sticking" the way it should and it seemed that management often did not understand.

And although this was hard work, I kept thinking if I JUST WORK HARDER....  
until...

## LEARN AND IMPROVE AS A TSP COACH

20 Miles to Mastery

### WORKING TOO HARD ON THE WRONG THING



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I realized I was WORKING TOO HARD ON THE WRONG THING.

I was teaching a PSP Class with Watts Humphrey. I worked hard to solve the students problems for them.

Watts simply pointed to the problem the students were having, explained why it was a problem and told them to fix it.

They would struggle and fix it - and they would understand.

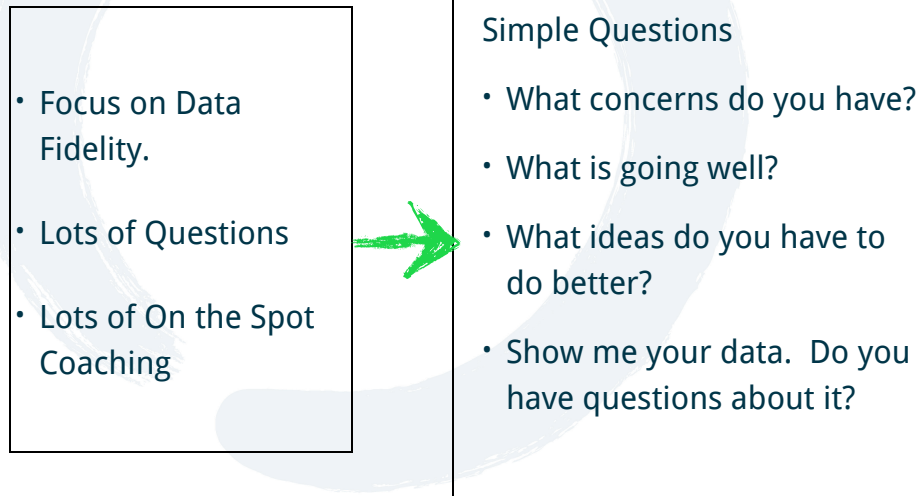
I realized that I was doing too much work for the teams on solving their problems for them.

I realized that they needed to own the problem and the solution.

I could help them a lot -- but I actually need to work hard on helping them own their problems and solutions.

For Example

## EXAMPLE: CHECKPOINT INTERVIEW EVOLUTION



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On the TSP Checkpoint, let's talk about the Interview section where we sit down and talk with each team member. The goal is to help the team members get better data fidelity and do better with plan management.

My original approach followed the book pretty closely.

I would do lots of prep and study each team member's data.

I would then go into the interview and show them each of the problems and explain exactly how to fix them.

I would ask lots of detailed questions about the project.

I would provide lots of ideas on how to do better.

(I really like to think that I didn't do it this Badly, but I think sometimes I really did!)

Now, I go in and I basically ask these 4 questions.

It still is good idea to know their data ahead of time to guide the conversation to problems you know about.

However, I find as you listen to the team member talk, they cover all the problems you have seen and more.

I have also found it very important not to give answers unless they have directly asked me. Even then I might wait for the detailed answer until the presentation.

The team members then have a day to think about our conversation.

In the presentation that wraps the checkpoint, I give the overall thread of the interviews and the ideas that have come up for improvement.

## EXAMPLE: CONCERN MANAGEMENT

- What am I worried about this week?
- Write the worries down.
- Whose concern is it?
- Give it to the owner!



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This is another thing I have learned. In some ways this goes beyond risk management.

I think most people think of risks as technical.

This is actually thinking about what worries you have.

For example before a launch think about what concerns or worries you have about the upcoming launch.

Write them down.

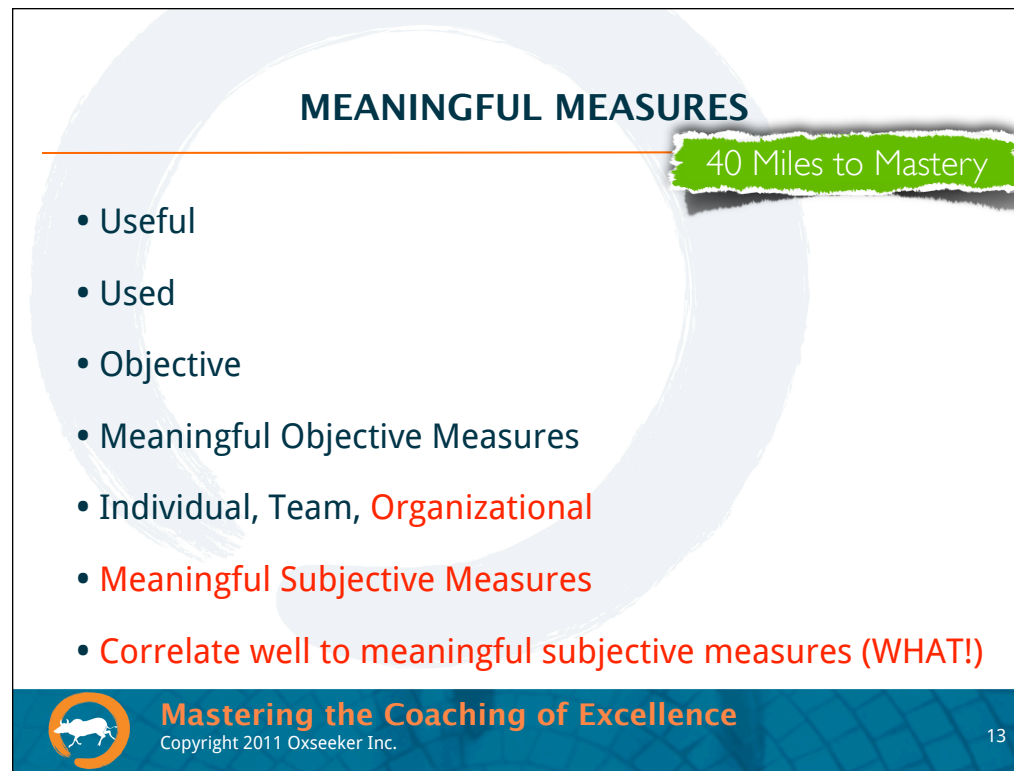
You may find there are things that you can do -- and even better - you find things you can talk to the team leader about so they can SHARE THE worry.

I have often found this helps the team solve a problem well before they actually occur.

These techniques and more have enabled me to help many more teams with less work on my part. And I find the process sticks for the team, they OWN IT.

but still in the last few years I noticed that whole organizations that are ALMOST there backslide -- sometimes amazingly quickly....

What is missing?




## MEANINGFUL MEASURES

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40 Miles to Mastery

- Useful
- Used
- Objective
- Meaningful Objective Measures
- Individual, Team, **Organizational**
- **Meaningful Subjective Measures**
- **Correlate well to meaningful subjective measures (WHAT!)**

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This section suggests one of the things that I think is missing. Most likely, there is more, but I think this idea will really help.

I believe that I had mastered the understanding that the concepts and measures I had been teaching were working for individuals on teams, and for the teams and team leaders.

However I, and I believe our community, have not been providing Meaning Objective Measures for organizational performance. For the organizations senior management.

Also, for senior management it also important to have meaning subjective measures, such as some form of customer delight. It is not sufficient to say "our projects our finishing on time"

And it would be best yet if our objective measures (such as quality) correlated well with meaningful subjective measures.

I think it is imperative that our TSP coaching community begins to provide this type of information to organizational leadership.

# ORGANIZATION PERFORMANCE CHARTS

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**Schedule Error**

Percent Error

late

early

Point	Percent Error (approx.)
1	100
2	40
3	55
4	60
5	15
6	22
7	100
8	25
9	130
10	50
11	120
12	55

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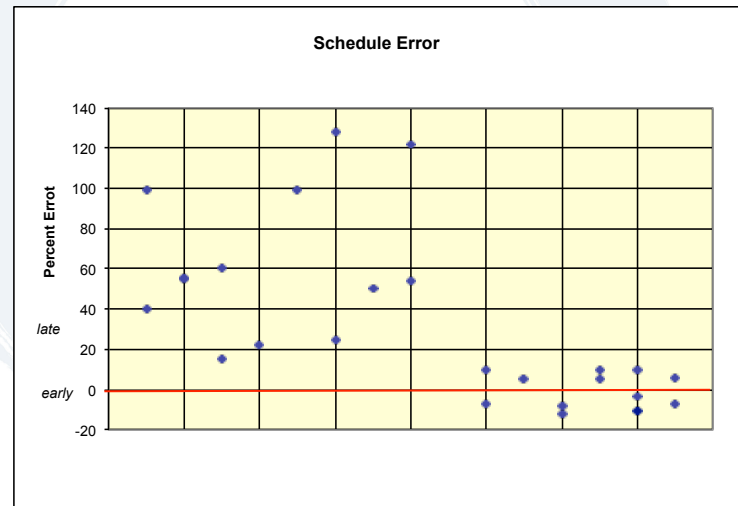
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Each data point represents a team and it's project performance for a specific objective - such as schedule, quality, features delivered (plan versus actual), etc.

It is a hope that the management team would quickly recognize that it is their responsibility to fix this.

And hopefully they would use the TSP as a way to do so and the get the results changed to look like this....

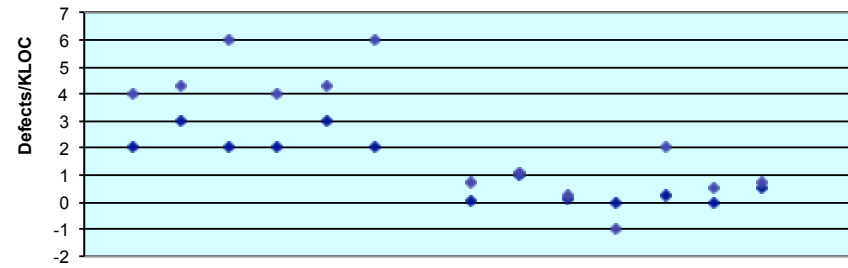
## ORGANIZATION PERFORMANCE CHARTS



Ah, when you see the performance suddenly change like this it is clear that there was a significant process change. In this case they did apply the TSP.

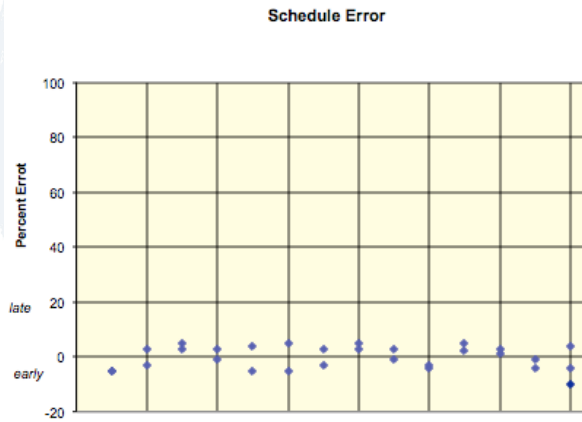
And on the next chart, the same.

### Quality





## A FAILURE OF LEADERSHIP?



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This chart is perhaps projects across 2 years where teams are consistently delivering on schedule.

Although this is indeed a good thing in many ways, I ask the question if this is a FAILURE IN LEADERSHIP?

I ask this because I believe that organizations should periodically review their results, and the reasons for the results, and look for ways to improve, to innovate on products and process.

This would naturally lead to variance. For example, I have made significant updates to my “presentation creation process” 5 times over the last 10 years. Each time has resulted in a change in my “slides/hour” rate.

This has effected my schedule performance.

The chart above indicates a very stable process.

So if you are going to innovate process what do you need?

**Checklist: ORGANIZATIONAL Performance Analysis Report**

Student \_\_\_\_\_

Instructor \_\_\_\_\_

**Legend**

✓ - O.K.

X - resubmit

**Grading**

Date \_\_\_\_\_

Start \_\_\_\_\_

End \_\_\_\_\_

Interrupt \_\_\_\_\_

Total \_\_\_\_\_

Report Process	Comments
<input type="checkbox"/> The process for producing the report was properly created and includes phases for Plan and PM.	
<input type="checkbox"/> The process was used to produce the performance analysis report.	

+ Planning Performance Analysis	Comments
<input type="checkbox"/> Size estimating accuracy was evaluated	
<input type="checkbox"/> Time estimating accuracy was evaluated	
<input type="checkbox"/> Impact of poor quality on time estimating accuracy was evaluate if appropriate to do so	
<input type="checkbox"/> The data-analyses are thorough and thoughtful.	
<input type="checkbox"/> Each data-analysis chart has accompanying comments.	
<input type="checkbox"/> The comments demonstrate an understanding of the data.	

Quality Performance Analysis	Comments
<input type="checkbox"/> Defects levels in compile and unit test were evaluated	
<input type="checkbox"/> The effectiveness of personal reviews were evaluated	
<input type="checkbox"/> The data-analyses are thorough and thoughtful.	
<input type="checkbox"/> Each data-analysis chart has accompanying comments.	
<input type="checkbox"/> The comments demonstrate an understanding of the data.	
<b>The following is a checklist of the types of charts the students may have used to do the analysis</b>	
<input type="checkbox"/> Pareto distribution of defect types	
<input type="checkbox"/> Percentage of defect types injected and removed by phase	
<input type="checkbox"/> Percentage of defects by type escaping compile	
<input type="checkbox"/> Defect fix times by phase injected and removed	
<input type="checkbox"/> A broken-down defect count by phase injected	

That is CORRECT! As in the Personal Software Process course for advanced students, we should conduct an ***Organizational*** “PERFORMANCE ANALYSIS PROCESS” and create a report.

We should most likely help members of the management team do this (It is THEIR DATA!) (and it would be working hard at getting them to own it!)

No one has presented any of these reports/data at the TSP Symposium. I challenge us as a community to be able to do a report on one next year!

The checklist above is based on the PSP checklist. Would the one we do for an organization be different? I think so, but to find out we need to do one.

Either way I am sure the outputs, the goals for this report are the same --->

Checklist: **ORGANIZATIONAL** Performance Analysis Report

Student \_\_\_\_\_

Organizational Performance Analysis Process Outputs

The report identifies improvement opportunities.

Realistic and challenging improvement goals have been set.

Appropriate actions to achieve the improvements goals are identified

The students may have used to do the analysis

- |                          |  |
|--------------------------|--|
| <input type="checkbox"/> | Pareto distribution of defect types                      |
| <input type="checkbox"/> | Percentage of defect types injected and removed by phase |
| <input type="checkbox"/> | Percentage of defects by type escaping compile           |
| <input type="checkbox"/> | Defect fix times by phase injected and removed           |
| <input type="checkbox"/> | Analysis of defect times by phase injected               |

Lets do THIS!

\*\*\*\*\*

But before I leave measures and organizational performance, I think there is one more interesting question --->

## SUBJECTIVE MEANINGFUL MEASURES

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- How about these questions for a start?

“How beautiful was the customer experience with our product?” (thanks to Mark Turner, Tektronix)

“Level of Trust in Organization” (thanks to Bob Munson, Microsoft)

100 Miles to Mastery



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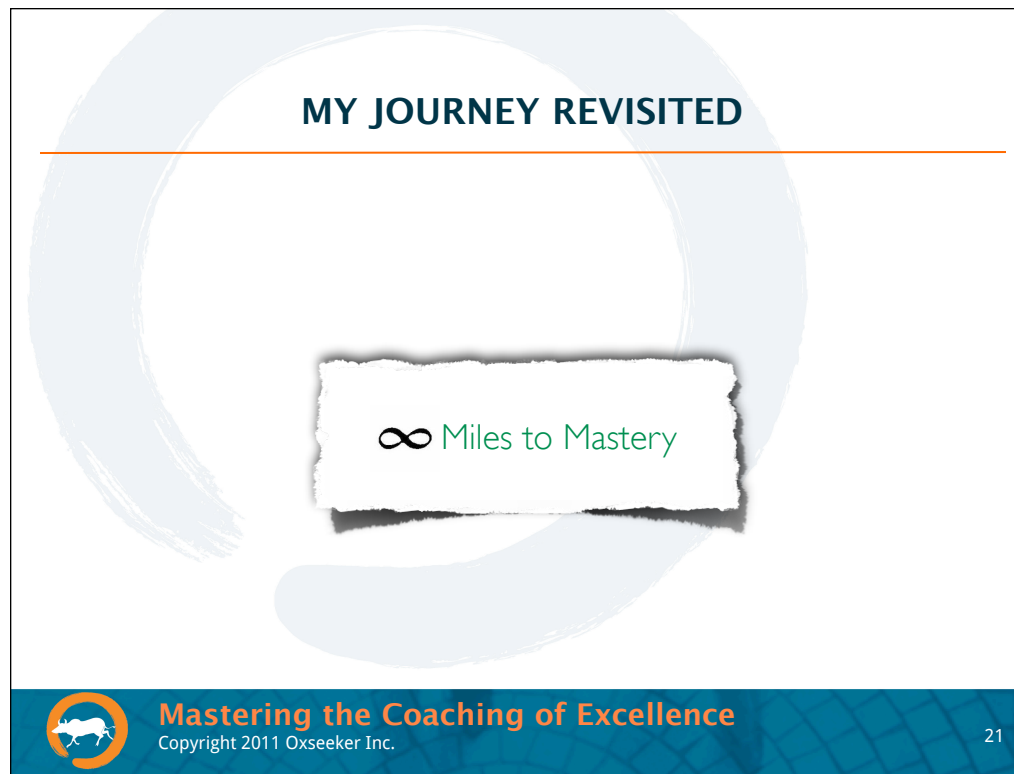
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Could Quality Measures (defects/KLOC or QPI) ever correlate with beautiful ? I don't know. But I do think it could be useful to ask these questions.

If there was correlation that was very meaningful, would that help drive leadership behavior?

It is the quest of these questions that makes me realize I have long way to go to the mastery I desire.



Going back to the start of this talk, my challenges of last year, my renewed realization that this ride is finite, has taken me back to revisit my career, my aspirations and goals.

As Monty Python put it “What is My Quest?”

I have wondered how good I am? I wondered if this is possible? I wonder how far to mastery it really is.

And I remembered and embraced that one big thought again.....

==>

**I CAN IMPROVE**

I have a good record of most of my experiences with coaching teams across the last 12 years.

I have data from many of them.

I can study, them, I can measure. I can think.

I can determine new data I need.

I can build processes that help guide me.

I can do a personal performance analysis report.

I can improve.

## EMERGING PERIODIC PERSONAL LEADERSHIP PERFORMANCE APPRAISAL PROCESS

- Every year or two (?) do some SCARY INVIGORATING STUFF
  - retrospective of all leadership / coaching projects completed
  - performance chart analysis
  - what are my meaningful measures?
  - establish performance goals
  - review PIPs
  - Generate new PIPs
  - deep review & thinking & reinvigoration of personal mission
  - establish meaningful personal long term objectives (3-5 years)
  - create and achievable short term plan (a TSP self launch)
  - What is my quality plan? What are meaningful defects? Collect Them!



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I do not know exactly yet what a personal performance appraisal process would look like.

I did one for PSP as discussed at the start of this talk. But that was about “how do I write good software”

This is about “how I coach teams to EXCELLENCE”

For Example, what is a meaningful defect in doing coaching? I am thinking it is way more than the the typical mistakes such as typos, mixed fonts, different colors on this slide that have no meaning to the audience!

I think a defect would be related back to the goal, back to meaningful measures of success.

I want to do all of these steps. I already did one of them -- I revisited my personal goals and mission.

I am part of Watts vision of vastly improving the world of software, but I think it is important for each of to reconnect with this in “what is MY contribution”

## INTENTION

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*Spread Fire!*



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When my wife and I were first married we made a “50 year plan”.

Part of that plan was personal missions. After lots of work, my personal mission was simply “spread fire”. I wanted to help other people.



## INTENTION

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oxseeker | äks'sēk'ər | (noun)

1. A person dedicated to the calm pursuit of excellence.
2. A person who consistently brings out the best in others.



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This year I revisited this mission.

It is the foundation of the name of my new business.

I realized that I can control, well at least influence, my own personal journey of excellence.

And I can hope to achieve the 2nd part, which is to help bring out the best in others.

Before Enlightenment

Chop Wood, Carry Water

After Enlightenment

Chop Wood! Carry Water!

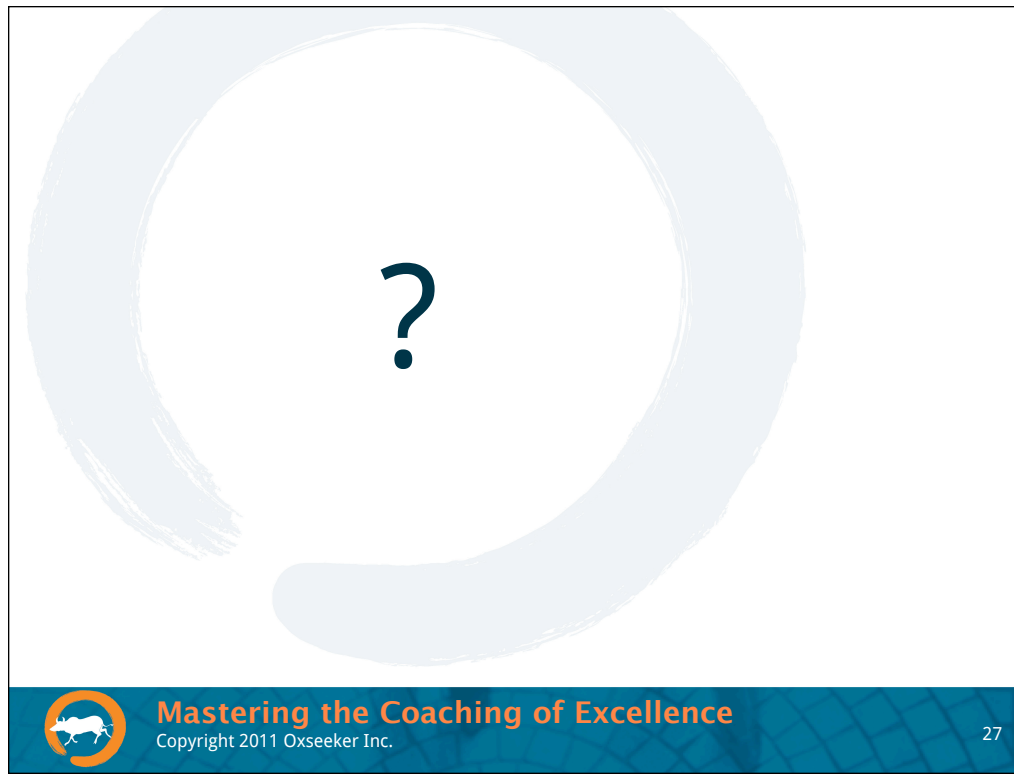
So after all of this work towards mastery. After re-thinking lots of how I do my work. After revisiting and revising my personal mission.

I realize that the most important thing to do is to help teams master their own journey.

I need to help them do Launches, Checkpoints. Post-mortems.

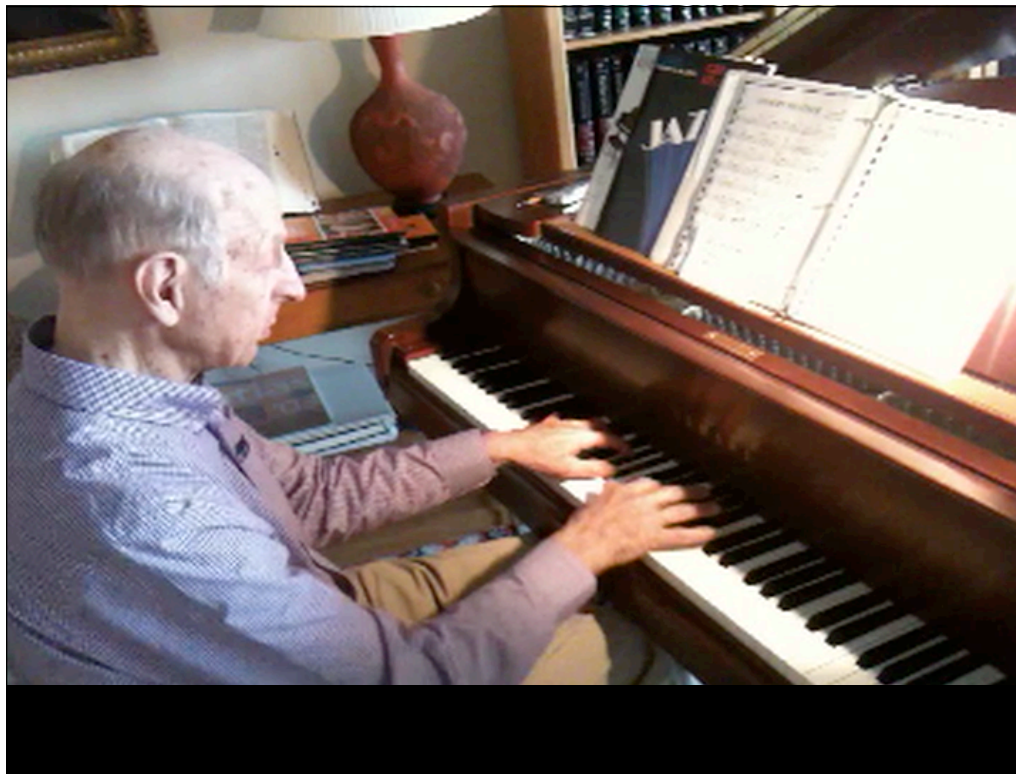
I need to help people with their own journeys.

Thank You.



Questions?

Also one last word afterwards



This is Watts Humphrey.

He learned to play piano in the last two years of his life.

I took this video clip while I was visiting him in florida. he knew that he was in the last few months of his life.

He is a true master of the journey.

*Life is an Adventure,  
Have an Excellent one!*



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Thank you.