### Flow Case Study Template *(for the FCC Certification)*

### Company: <enter company name>

### Value-add: <enter value add here>

### Industry: <enter here>

FCC: **<enter your name here>**

FCT and/or authorized FCC Coach: **<enter your FCT’s / authorized FCC’s name here>**

*If you have any questions / comments regarding this Flow Case Study Template, please reach out to me at* [***andrew@andrewkallman.com***](mailto:andrew@andrewkallman.com) *(thanks!).*

**<Please highlight in yellow any and all answers that you add below (I didn’t highlight all of the questions, but I think you get the idea to highlight the other ones that I didn’t highlight). This will help me immensely in reading the document. In advance, thanks!>**

**Executive Summary**

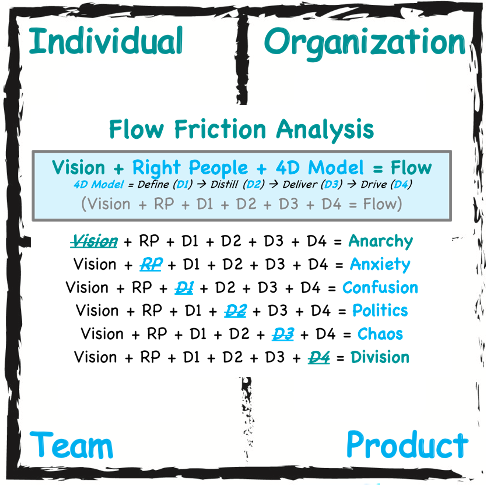
**<Write this section last, with your summary and final thoughts on the successful project, product development and/or assignment on which you worked>**

***Note****: FCCs (Flow Certified Coaches), as part of their certification process, select one successful project/product (current or past) that they have launched and then apply the Flow Friction Analysis along with the Individual, Team, Product (Program, Process) and Organization 4-box to fill in the details of that success (included in the template below).*

*The FCC candidate uses the 13 mini cases along with the SingTel example that are included in our book “Flow: Get Everyone Moving in the Right Direction...And Loving It” as reference examples when filling in the details for your case study.*

*This is a powerful exercise that we use in our FCC and FCT training path that moves the content of this book from the abstract and theoretical over to the street-level, battle scarred arena of real-world implementations and change management.*

**Part I - Flow Friction Analysis (“as is” baseline)**



**<Enter Name of assignment>** had the following anti-patterns and Flow Friction items **(double-click on the box to put in a “checkmark” for each one of the Flow Friction Analysis items that applies/applied to your project/work effort)**:

**Anarchy**

**Anxiety**

**Confusion**

**Politics**

**Chaos**

**Division**

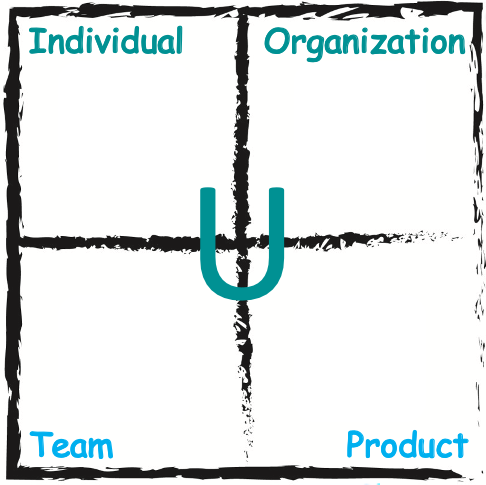
Remember that a successful project will have had experienced Flow, as per the Flow Formula:

Vision + Right People + Definitions + Distillation (of Agreements) + Delivery + Drive (to Success) = Flow / Successful Organization. This about the “as is” starting point and the “to be” ending point of the effort. Write your thoughts here:

**<fill in how & why each item you chose in the friction analysis above was present / manifesting in your team/product development/project>**

**Part II – The Individual-Team-Product-Organization 4-Box**

**Note:** keep in mind that the “Product” box includes Program, Process, Line Management, etc.; and, that the “Team” box includes Project(s).



Now, fill in the details of your project / product for the “Individual-Team-Product-Organization” 4-Box:

**Individual (use the 4R and 4D Models)**

**<share who is on your team + what is their T-shape/specialization – and this is part of the first “D” in the 4D Model below. Also, use the 4R model for each team member>**

* Right Truth (Define)
  + Share each team member’s (as best as you were able to discern it) worldview or “truth” by which they lived
* Right Values & Attitudes (Distilled)
  + Did each team member display the right values & attitudes needed for the team to succeed?
    - If not, why not.
    - And, what was done to mitigate this?
* Right Actions (Deliver)
  + Did the team member behave in a consistent way?
  + Were they reliable / dependable?
  + If they let down the team along the way, what was their reaction to doing that?
  + Was the team member working on personal continuous improvement and becoming more T-shaped?
    - If not, why not.
    - And, what was done to mitigate this?
    - What did you do, specifically, to help the team member become more T-shaped?
* Right Results
  + Were all of your team members successful?
    - If not, why not?
    - And, what was done to mitigate this?

**Team (use the 4D Model)**

**<use the 4D Model and use each “D” to describe your team>**

* Who (besides the team members listed above, were there any other team members / roles that were missing in order to have a complete team)?
  + You don’t need to list everyone, again here. Only those that might have been missing from the
* When (did we start)?
* Where (was the team co-located, or distributed over multiple locations/time zones)?
* Define - Definitions
  + What was the VSPT for your team?
  + What was the size & quality of your initial backlog as a team?
  + Was the backlog growing faster than the team’s ability to deliver?
* Distillation
  + When did distillation occur (in which sprint/iteration)?
    - This usually happens when the team realizes that the initial Product Backlog they built at the training / workshop really isn’t helping them achieve their goals and/or isn’t getting them closer to delivering the Vision.
    - At that point, the team will usually begin to create NEW product backlog items.
    - When you observe these two things, then true “Distillation” has begun.
* Deliver
  + Any hiccups that you might have experienced.
  + Did the team maintain discipline throughout the sprints/iterations?
  + Did you observe any compressions, time savings, increased efficiency and/or productivity along the teams journey?
* Drive
  + Did the team focus on goals delivered?
  + Did the team keep the Vision front and center?
  + Did each review demonstrate that the team was one step closer to delivering the Vision?

**Product / Program, Process, Line Management (use the 4D Model and the 4 Whys)**

**<use the 4D Model from a Sales, Marketing and Product Development perspective, including the 4 Whys, Strategies and tactical implementation for the product launch / roll-out>**

* What (product, service, solution, result)?
* Why (are we doing this project)? Only four (4) reasons to do any project/service/result in any organization:
  1. Increase Revenues
  2. Save Costs
  3. Mitigate or Eliminate Risk (both negative and also leverage positive)
  4. Do the right thing
* Share which of these four (can be multiple) are the reasons for doing your assignment
* Define
  1. What were the key product definitions?
     + Product can also mean service or result
* Distill
  1. Was the customer in agreement with the definitions?
* Deliver
  1. Did you consistently deliver product increments to the customer along the way during the development of the product?
* Drive
  1. Was the Product Vision delivered to the customer in a way that it wasn’t just on-time, on-budget and on-scope; but, rather it was delivered in a way that your customer was delighted and said “wow”?

**Organization - Executive / Portfolio (use the 4D Model, VSPT and Cascading Vision)**

**<Use the 4D Model, VSPT and Cascading Vision to explain how the leadership is transforming/creating the culture that will enable the organization to achieve consistent, high-performance>**

* **VSPT**
  + Did you have a clear Vision from the Organizational leadership?
  + Did you have a clear Vision from your Department / Division?
  + Did your Portfolio have a clear Vision?
  + Did your Program have a clear Vision
  + Did your team link their Vision to all of the above listed visions?
    - If not, why not?
* **Cascading Vision**
  + Did the Executives clearly (and often) communicate their vision to their organization and team?
  + Did the team identify, through their retrospectives, any “one thing” feedback items (key things that if the executive did them then the team would have a higher chance of success); and, did the team then communicate those back to the Executives?
* **4D Model**
  + Define
    - Did the Executives have clear Definitions for what they wanted to achieve?
  + Distill
    - Were there politics between the Executives and leaders (either horizontally or vertically)?
    - What did the team need to do to mitigate the politics and the impact on the team?
  + Deliver
    - Were the Executives and Leaders modelling the behavior?
      * Walking-the-talk vs. just talking-the-talk?
  + Drive
    - Did the leadership style and culture of the organization help or hinder the team?
    - Why?

**Part III – Aha-Curve Impacts in all four parts of the “Individual-Team-Product-Organization” 4-box:**



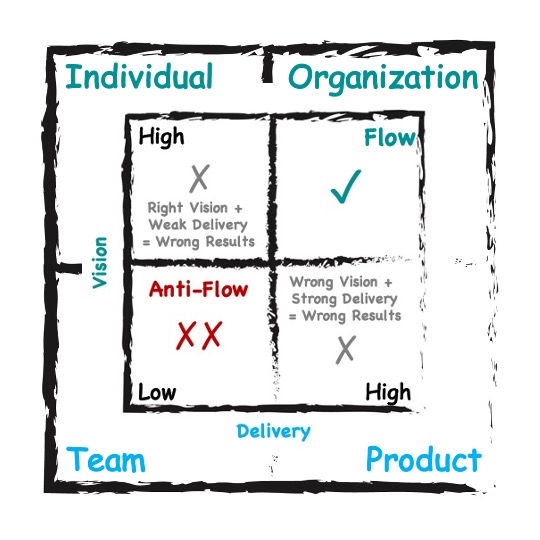
Write your thoughts here (i.e. how “Getting to Aha!” has impacted your 4-box analysis above, etc.):

**<update & fill-in as needed>**

* Place each team member on the above curve at the beginning of the development / assignment
  + Individuals
    - Struggling - <list each person here that was struggling>
    - Motion – <list each person here that was only going through the motions>
    - Perform – <list each person here that was performing>
    - High Perf - <list each person here that achieved a consistent, sustainable state of high performance>
  + Team-level
    - ‘Within the Room’- share if the team where the team was at in the protected environment (Struggle, Motions, Performing or High performing?)
    - ‘Outside the room’ – (Struggle, Motions, Performing or High-performing?)
  + Product (includes Program, Middle Management, etc.)
    - Struggle, Motions, Performing or High performing?
  + Organization (includes Portfolio, Executives, etc.)
    - Struggle, Motions, Performing or High performing?
* Then, do a second curve with where they were at the end (same as above, but the end state at the end of the development / assignment)
  + Individuals
    - Struggling - <list each person here that was struggling>
    - Motion – <list each person here that was only going through the motions>
    - Perform – <list each person here that was performing>
    - High Perf - <list each person here that achieved a consistent, sustainable state of high performance>
  + Team-level
    - ‘Within the Room’- share if the team where the team was at in the protected environment (Struggle, Motions, Performing or High performing?)
    - ‘Outside the room’ – (Struggle, Motions, Performing or High-performing?)
  + Product (includes Program, Middle Management, etc.)
    - Struggle, Motions, Performing or High performing?
  + Organization (includes Portfolio, Executives, etc.)
    - Struggle, Motions, Performing or High performing?

**Part IV - Using the elements of the Flow Canvas**

***Flow Canvas – Vision/Flow Clarity***

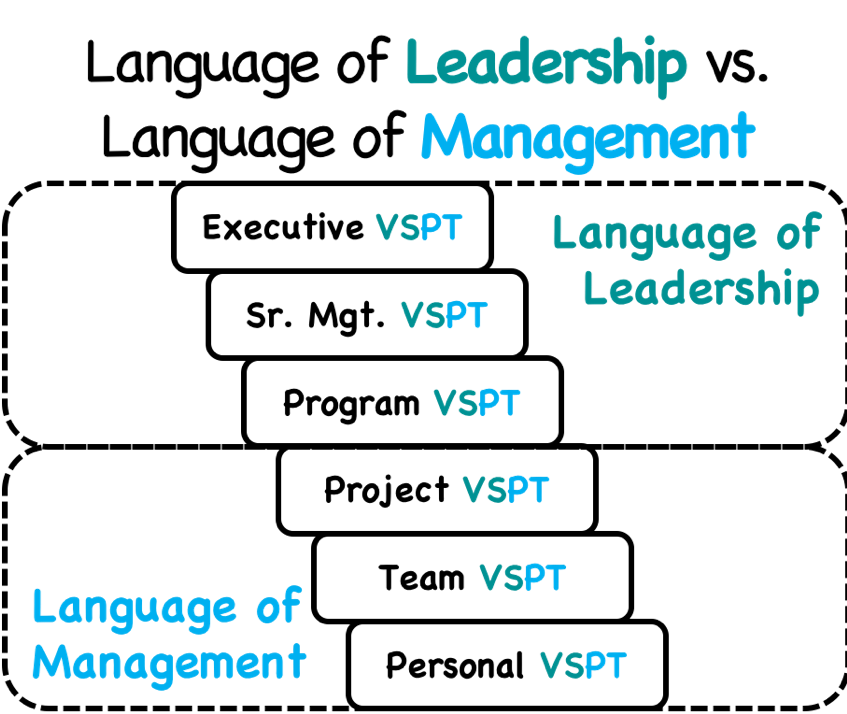
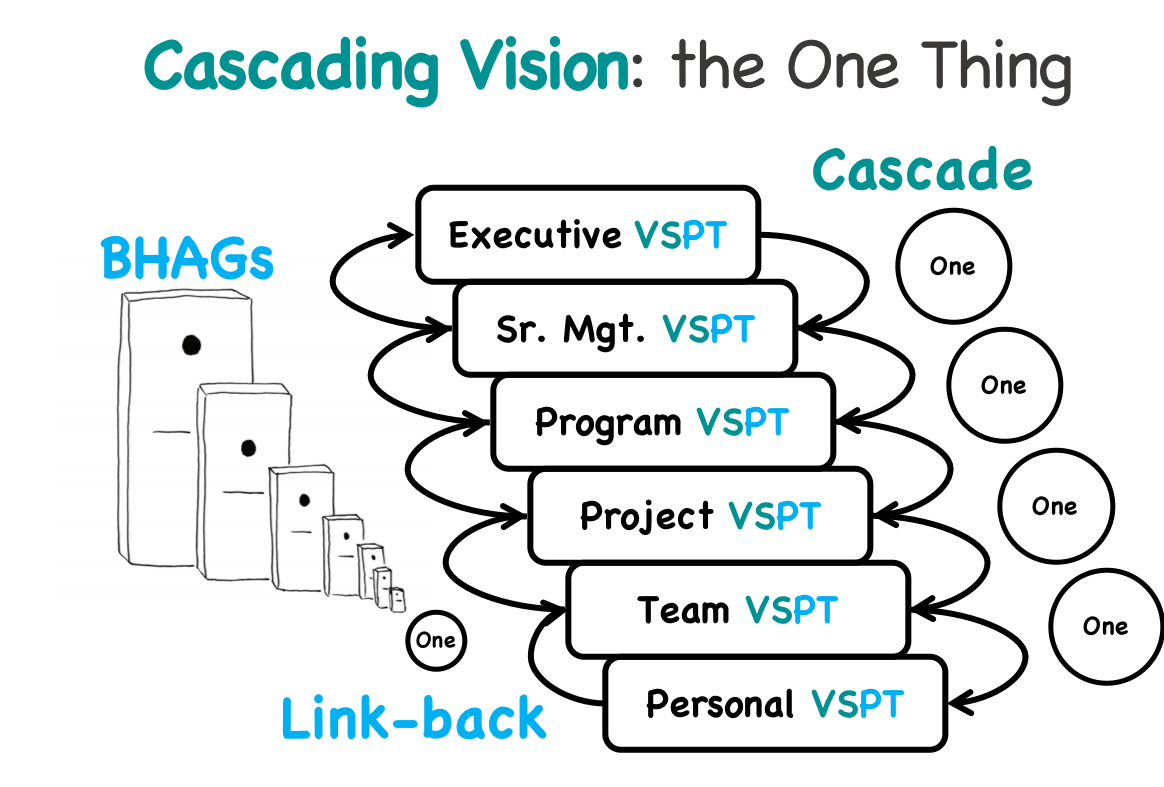


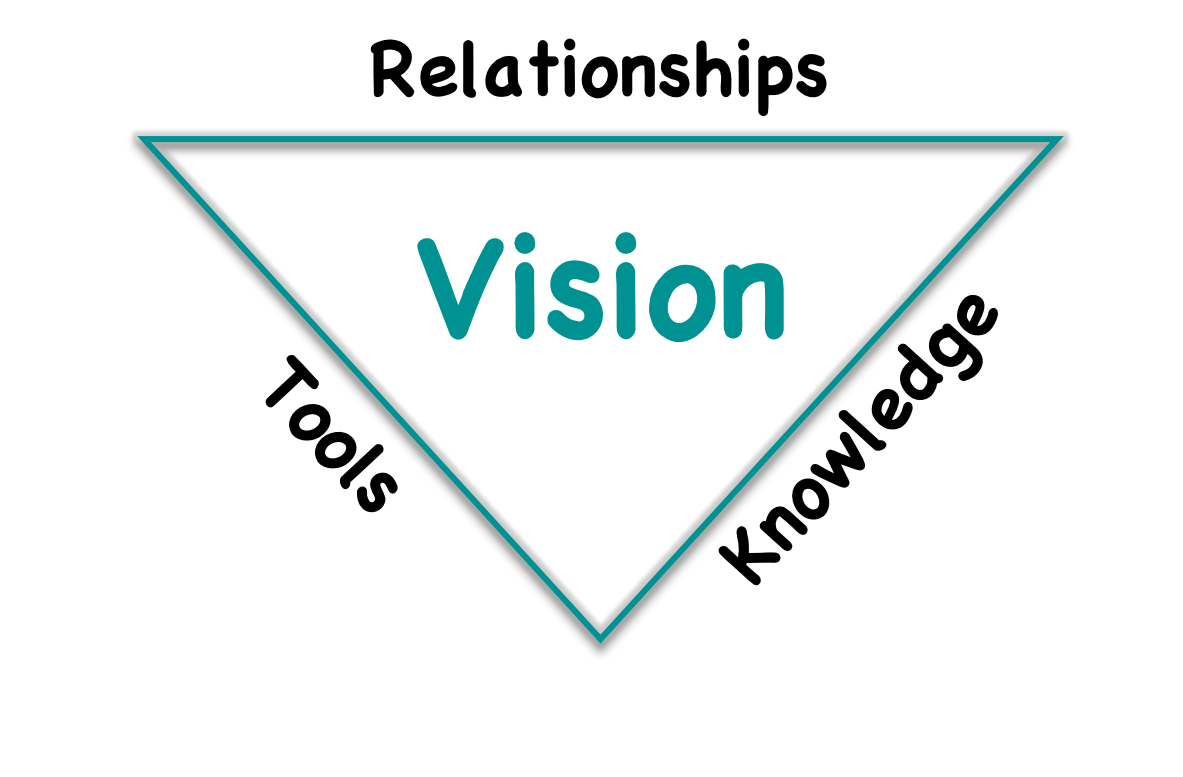
Share your thoughts on where your project was, at the beginning, using the above Vision / Flow Clarity analysis.

**<share here>**

* Here’s an example (edit to match your team; add other items if these don’t apply):
  + Low understanding of the tool and task at hand.
  + Our team vision was clear but did not know how it lined up with Leaderships vision.
  + Who owns the roll-out became a big issue.

***Flow Canvas – Communication(s) Gap***



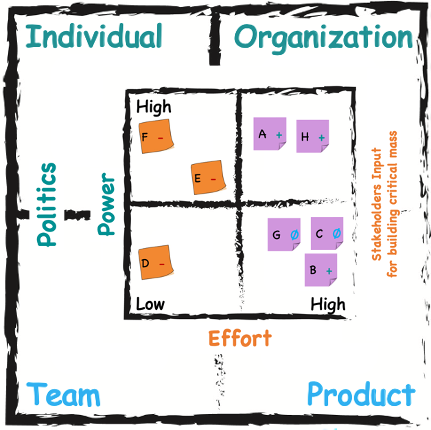
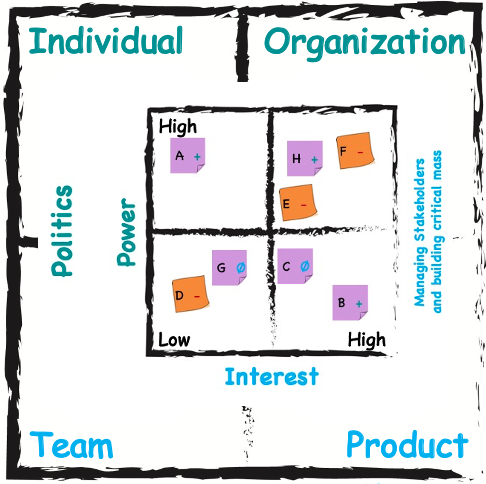
Share your strategy and tactics for bridging the communications disconnect between your team and the organization:

**<Languages of Leadership/Management – share here>**

**<Cascading Vision, VSPT and The One Thing - share here>**

**<Relationship, Tools, Knowledge triangle – share here>**

***Flow Canvas – Stakeholder Mapping***

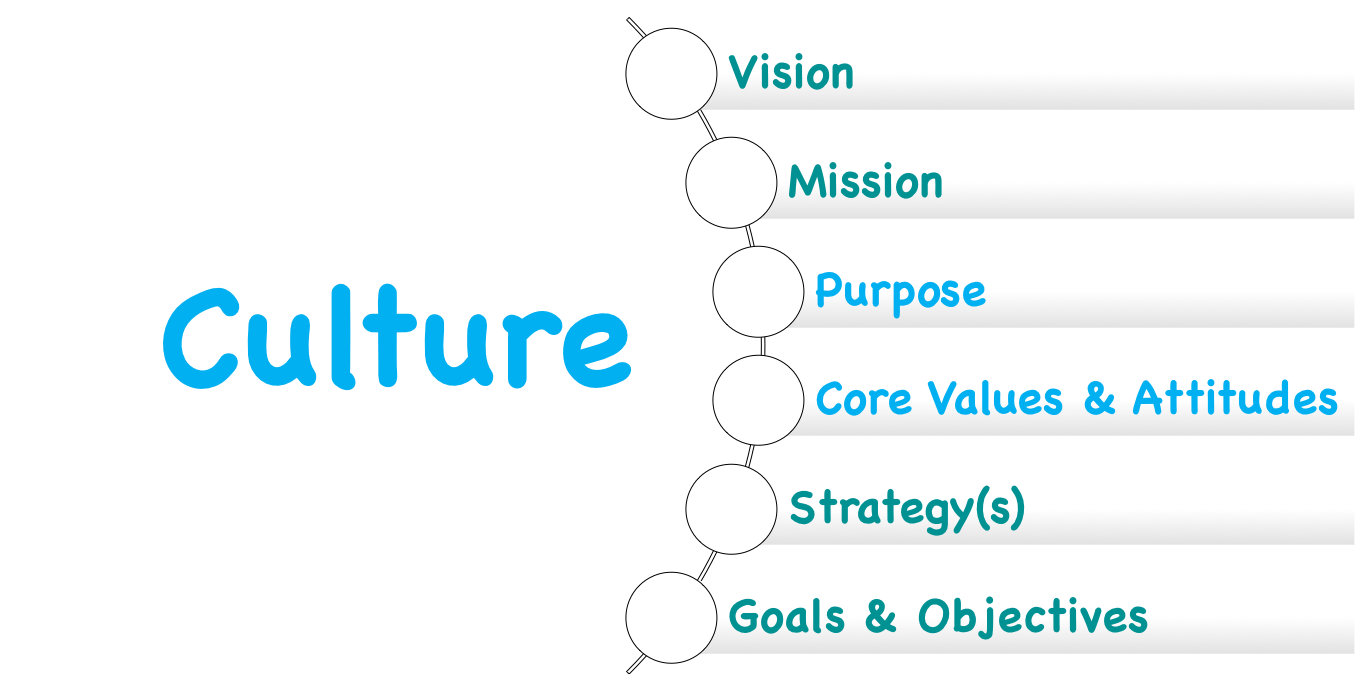


Share your thoughts on Stakeholder Management and internal campaign management. Are you stakeholders for you, individually; and, are they for your project (two separate things)?

**<Share each key stakeholder here and why they are a +, - or 0 for your project – use both the effort and interest pictures above>**

**<include a stakeholder map like the one above>**

***Flow Canvas – Culture Mapping***



Using the Flow definition of Culture, analyze your organization using the outline above and how each of those will either enable or hinder your project’s ability to succeed.

**<Share each item here>**

* Vision
  + **<include a copy of both your team’s Vision, your division’s Vision along with the Company Vision>**
* Mission
  + **<include a copy of both your team’s Mission, your division’s Mission along with the Company Mission>**
* Share the Purpose for your project
* Share your Team’s Core Values & Attitudes
  + **<include a copy of any team agreement(s) that exist>**
* To which Strategies does your team link
* Share the Overall Goals & Objectives of your project
  + **<include copies of Sprint goals>**

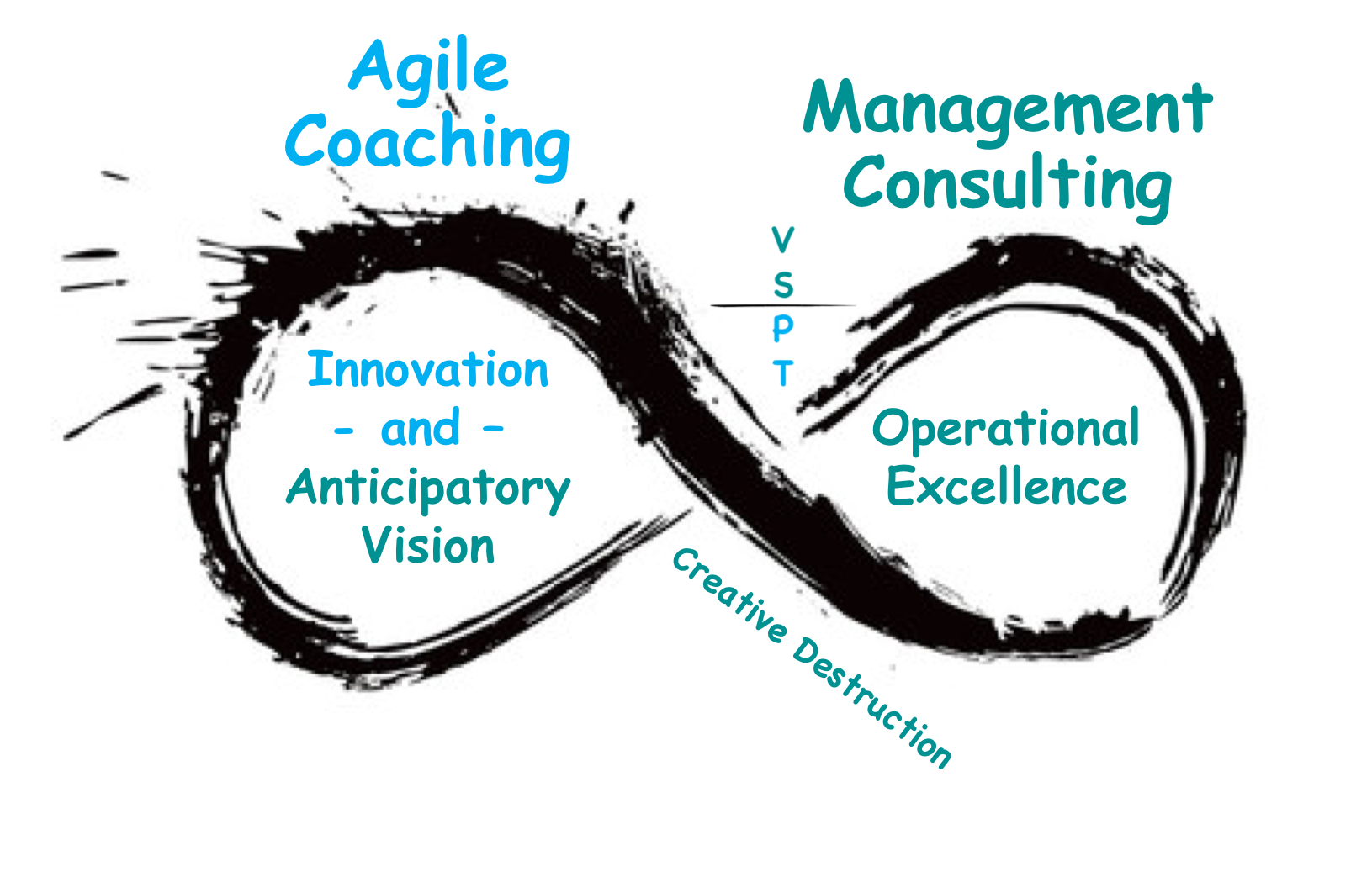
Also, include the baseline summary team health check picture, if available. Use the above picture along with the 4D and 4R Models for additional clarification, if needed.

**<Share team health check picture here, if used, if not used, insert “n/a” for this section>**

**<Share which item(s) need attention based on the results of the health check>**

**<If any of the items links to Culture, explain how Culture is either an enabler or a blocker to your team really being able to succeed>**

***Flow Canvas – Agile Coaching / Management Consulting***



Share examples from your current project of how you have used both Agile Coaching and Management Consulting with your team(s).

**<Share your examples of using both ways of working here>**

***Flow Canvas – Stacey Diagram***

A screenshot of a cell phone

Description automatically generatedA screenshot of a cell phone

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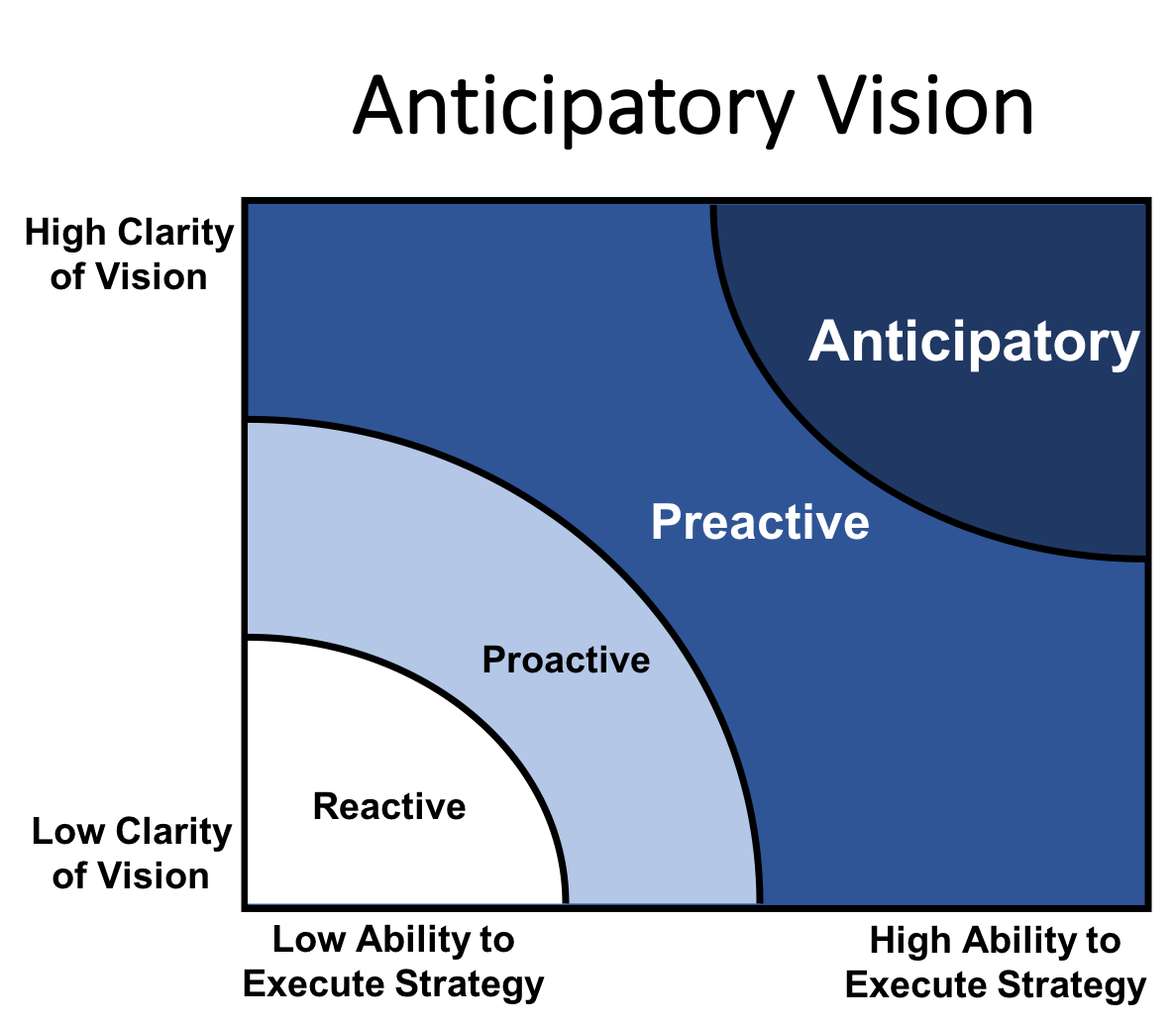
Using the Stacey diagram, chose one of the four items below and then describe at which level your project is operating?

* Simple
* Complicated
* Complex
* Chaos

Example description:

*“Based on what we have seen so far, <company x> appears to be more reactive than proactive. Although, <company x> has an emphasis on innovation, but they seem to be a market follower and not a leader. <company x> is at least xx years late in adopting, doing and (ultimately) being Agile.”*

***Flow Canvas – Anticipatory Vision***



Using the Anticipatory Vision matrix, chose one of the four items below and then at which level your project is operating?

* Reactive
* Proactive
* Preactive
* Anticipatory

**<Share your answer here, with your justification/motivation defending your answer – see example up in the Stacey Diagram section for thought starters>**

**Part V - Value-add for each project/assignment**

If possible, assign in real dollars the concrete value-add your project is bringing to the table. If not measurable in actual currency, then look for ROIs using:

* Faster speed to market
* Increased revenues/sales
* Cost savings
* Decreased risk/error reduction
* Increased team velocity
* Increased speed of decision making
* Compressed timelines
* CSR-like KPIs

**<Share your answer here, with your justification/motivation defending your answer>**

**Part VI – Final Thoughts**

Your “Final Thoughts & Conclusions” should now be shared in the Executive summary at the start of this template.

**Thanks, and congratulations on completing your next step in achieving the FCC!**