SCRUM ALLIANCE®
CERTIFIED AGILE LEADERSHIP I (CAL I)
Learning Objectives

December 2018
by the Scrum Alliance Agile Leadership Learning Objectives Committee

INTRODUCTION

The goal of the CAL I is to raise awareness in the minds of participants as to the benefits, mindset, skills, and characteristics of an agile leader. It is an introductory set of topics intended to start (or continue) a journey.

Participants in CAL I should expect that each learning objective identified in this document will be c vered over the course of the program. The model for CAL I is flexible, allowing educ tion providers to deliver the program in a way that best meets the needs of their customers, including a mix of training and coaching as well as bundling learning objectives in distinct learning sessions.

The CAL I learning objectives provide a framework for program development that purposefully avoids recommending specific models and app oaches. Education providers are expected to include specific models and approaches that meet these objectives in their programs.

Learning objectives for the CAL program are based on the Agile Manifesto, Scrum, research in leadership effecti eness, and organizational patterns that are effecti e in complex and rapidly changing environments.

The learning objectives for CAL I cover fi e categories, which must be delivered over a **minimum of 17 contact hours**. At least half of the contact hours must be in person; the rest may be delivered via alternative formats (online, virtual, etc.). The program may be contiguous or spread out over time. A mix of training and coaching is encouraged. Each category has a specific **minimum** number of contact hours:

Current requirements to become an approved CAL education provider:
Any Certified Scrum   Trainer® (CST®), Certified Team Coach (CTC), or Certified Enterprise Coach (CEC) can deliver the program, provided they have submitted a successful Educator application and can demonstrate competency in educating all five categories within an established or self-created leadership development framework. For example, Organization & Relationship Systems Coaching (ORSC), International Coaching Federation (ICF), Co-Active Coach Training (CTI), Leadership Agility 360, The Leadership Circle, The Leadership Gift, etc.
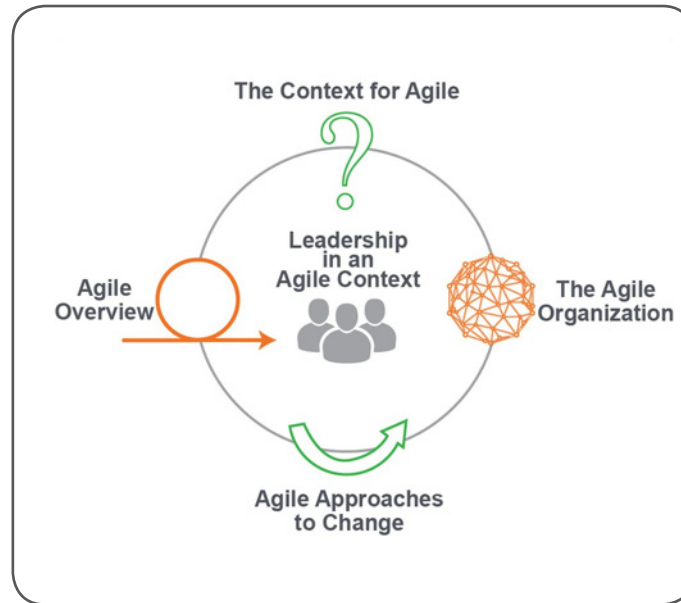
Definitions and acronyms
- **LO – Learning objective**
- **CAL – Certified Agile Leadership (CAL) program**
- **CST – Certified Scrum Trainer**
- **CEC – Certified Enterprise Coach**
- **Approved CAL Educator – An Educator who meets the requirements set forth by Scrum Alliance and who has been validated to deliver predefined learning objectives**

- **CAL Credential I –** CAL I is an introductory, education-based program with learning objectives across five categories. The goal of CAL I is to bring awareness of agile leadership thinking, focus, and behaviors and to start the agile leader on their learning journey. The CAL I credential is achieved upon successful completion of the CAL I learning objectives.

LEARNING OBJECTIVES

1. **The Context for Agile (two contact hours)**
2. **Agile Overview (three contact hours) — may be acquired in prerequisite work**
3. **Leadership in an Agile Context (five contact hours)**
4. **The Agile Organization (four contact hours)**
5. **Agile Approaches to Change (three contact hours)**

Credential Level I

Pictorial overview of five CAL I learning objective categories

A note about Bloom's Taxonomy:
While some Learning Objectives appear to tell a trainer or coach how to teach, that is not the intent.
Bloom's-style Learning Objectives describe what the learner can do upon completing the class.
Instead of including the words, please mentally start each Learning Objective with the following phrase:
"Upon successful validation of the CSM Learning Objectives, the learner will be able to… "

This Bloom's style of Learning Objectives consists of six levels of learning:

- **Knowledge**
- **Comprehension**
- **Application**
- **Analysis**
- **Synthesis**
- **Evaluation**

Examples used in the learning objectives:
Several learning objectives include a list of examples. The examples are used to clarify the intent of the objective. Individual trainers can use the provided examples, their own examples that still meet the objective, or a mix of both. The inclusion of examples does not imply that they are the only options, or that they're an exhaustive list.

The learning objectives must be shared with every attendee of a CAL I course and are available on the Scrum Alliance website.

Certified Agile Leadership (CAL) I Learning Objectives

1. The Context for Agile

1.1. Describe at least three **economic or market factors** that have led to the rise of agile approaches. For example:
- Technological advances
- Internet, mobile, and social media connectivity
- Globalization of the workforce and economy
- Etc.

1.2. Illustrate how the **complexity** and **uncertainty** of work relates to the fitness of an agile app oach.

1.3. Identify at least two **management trends** and their historical fit with the business e vironments of their time. For example:
- Taylor's Scientific Managemen
- Total Quality Management (TQM)
- Lean Manufacturing and the Toyota Production System
- Etc.

1.4. Explain the long-term effects of an o ganizational focus on **delighting the customer**, and how that relates to improved outcomes.

1.5. Explain at least three factors that increase the level of **employee engagement**, and how that relates to better outcomes. For example:
- Clear purpose
- Autonomy
- Opportunity to develop mastery
- Strong social connection
- Daily small wins
- Etc.

1.6. Describe at least two **benefits of becoming a more effective agile leader**. For example:
- Increased ability to make good decisions in a complex environment
- Ability to deliver on personal and organizational purpose with less expended energy
- Etc.

2. Agile Overview

Note: Learners can opt out of this section if they hold a Scrum Alliance CSM or CSPO certification that covers the learning objectives in this category.

2.1. Evaluate the **values and principles of the Agile Manifesto** for how they relate to an organization's ability to thrive in complex and rapidly changing conditions.

2.2. Describe at least three **characteristics of a high-performing team** and how these characteristics relate to agile thinking. For example:

Knowledge   Comprehension   Application   Analysis   Synthesis   Evaluation

- Psychological safety
- Trust
- Clear team membership
- Small
- High-communication bandwidth
- Aligned around a clear purpose/mission
- Etc.

✅ 2.3. Compare and contrast the practices and benefits of t least two **common agile frameworks**.
For example:
- Scrum
- eXtreme Programming
- Kanban
- Lean Startup
- Etc.

⚙ 2.4. Describe the **benefits of an agile approach** from the perspective of at least three **stakeholder groups** with differing needs. or example:
- Board of Directors
- Shareholders
- Employees
- Customers
- Etc.

3. Leadership in an Agile Context

⚙ 3.1. Describe at least three key **mindset shifts** required to effecti ely lead in an **agile context**.
For example:
- From fi ed mindset to growth mindset
- From directing to coaching
- From telling to collaborating
- From preventing and hiding failure to learning through it
- From viewing the organization as a machine to viewing it as a living system
- From predict and control to inspect and adapt
- From chess master to gardener
- From expert to catalyst
- From reactive to creative
- Etc.

⚙ 3.2. Explain at least one **leadership development framework** that is aligned with agile thinking.
For example:
- Leadership Agility (Joiner)
- The Leadership Circle (Anderson)
- NeuroLeadership (Rock)
- The Leadership Gift (Avery)
- Etc.

3.3. Apply at least one technique for **incorporating feedback** that improves your ability to inspect and adapt **your own leadership behavior** to increase effecti eness.

3.4. Practice at least one technique that enables **a leader to be present, aware, and engaged**, while avoiding over-influence and mic omanagement. For example:
- Gemba
- Hawthorne effect — paying ttention
- Engaging in the agile delivery and feedback cycle
- Advice process
- Etc.

3.5. Demonstrate a **coaching approach** that integrates alternative perspectives, engages others, and improves outcomes.

4. The Agile Organization

4.1. Identify at least three challenges an organization might face when undertaking an **agile approach beyond a single team**. For example:
- Building trust between teams
- Optimizing the whole
- N-factorial problem as communication scales
- Large-group collaboration
- Psychological safety
- Etc.

4.2. Apply at least three patterns for **increasing trust and collaboration** between multiple teams. For example:
- Information radiators
- Colocation
- Radical transparency
- Job rotations
- Team liaisons
- Etc.

4.3. Describe at least two factors that influence the **culture of an organization** and how that relates to organizational agility. For example:
- Power distance index
- Organizational structures
- Leadership beliefs and behaviors
- Risk and change attitudes
- Industry factors
- Etc.

4.4. Evaluate at least two ways to **structure an organization** to enhance agility. For example:
- Value-based matrix (e.g., Spotify)
- Communities of practice
- Holacracy

💡 Knowledge   ⚙ Comprehension   ⇕ Application   ▥ Analysis   ⚙ Synthesis   ✓ Evaluation

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- Sociocracy
- Self-management
- Etc.

⚙ 4.5. Describe at least three **governance policies** that enhance organizational agility.
For example:
- Compensation and incentives
- Career advancement practices
- Performance appraisals
- Procurement and budgeting
- Legal and regulatory
- Etc.

📊 4.6. Deconstruct at least one **case study of an organization** that uses an agile approach.
For example:
- Spotify
- Morning Star
- Valve
- Buurtzorg
- Zappos
- Geonetric
- Etc.

5. Agile Approaches to Change

⚙ 5.1. Describe an agile organization as a **human system** where **change is always present** and dynamic leadership is required to catalyze that change for positive growth.

✓ 5.2. Evaluate at least three **organizational metrics** for their alignment with agile thinking and how they impact behaviors and results. For example:
- Outcome-based metrics, such as customer satisfaction, employee engagement, time to market, cost, etc.
- Output-based metrics such as productivity, velocity, features delivered, milestones met, etc.

✓ 5.3. Deconstruct at least one **change management approach** and evaluate its alignment with organizational agility. For example:
- Scrum
- Lewin
- Satir
- Kotter
- McKinsey 7S
- Etc.

⚙ 5.4. Describe at least one agile approach to identify and **reduce bottlenecks, impediments, and overall friction** in an organization. For example:
- Systems thinking
- Human systems dynamics

- Lean A3
- Organizational agility team using Scrum
- Large-group retrospectives
- Kaizen events
- Etc.

5.5. Reflect on t least one **case study of an agile transformation** and critique how it approached **change in an agile way**.

PROGRAM TEAMS

Strengthening our Certific tions:

2015 Program Design Team- October 2015 Draft:
- Pete Behrens
- Steven Denning
- Angela Johnson
- Pollyanna Pixton
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2015 Program Design Team – March 2016 Draft:
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