



AGILE STRATEGY LAB



College of BUSINESS
University of NORTH ALABAMA

What is the Agile Strategy Lab?

At the Lab, three realities define our imperative to move beyond traditional approaches to management:

- Nothing is constant, except change; agility is not optional. Business and civic leaders must master the skills of jumping from S-curve to S-curve.
- A shift from hierarchies to networks is transforming our organizations and alliances. Agility requires both a new mindset and the skills to develop and scale innovating networks.
- Today's challenges are not just complicated; they are wickedly complex. Addressing complex challenges requires a new approach to management based on core agile principles: relentless experimentation and rapid iteration.

The economic and competitive landscape is continuously shifting. We are living in a “whitewater world”. The Lab designs, tests, and disseminates new approaches to managing this complexity.



What does the Lab offer?

While the challenges may be complex, at the Lab we craft solutions that are based in practice rather than theory, and that our clients can begin to implement immediately - not after they've finished a six-month study. All of our work is based in the conviction that transformation - organizational, community, or regional - begins with collaborative conversations with an underlying structure, and that leaders can learn to design and guide these conversations by following simple rules and mastering specific, teachable skills. Building on those conversations, leaders can develop and guide the new networks that create sustainable transformation.

Our activities include:

- **Training:** we offer both online and in-person professional education targeted at all levels of experience. A signature offering is “Strategic Doing: Leading Complex Challenges.” Strategic Doing is a rigorous strategy discipline specifically designed to address complex challenges. Based on the operational model of open source software development, Strategic Doing helps people form complex collaborations quickly, move into action immediately, and make adjustments, as they learn by doing. Other training includes 10 Skills for Agile Leadership, Rapid Improvement, Innovation Engineering, and Building an Agile Ecosystem. Our training activities range in intensity from a half-day workshop to online offerings spanning several months, and may be “open enrollment” or customized courses for individual clients.
- **Consulting:** we work with individual clients to address specific complex challenges. A hallmark of our approach is that we never tell a client what their strategy should be - rather, we help clients learn and practice new skills and cognitive frameworks as they craft their next strategic direction.
- **Writing and Speaking:** we believe in the power of the written and spoken word to change management practice. The senior leadership of the Lab are co-authors of *Strategic Doing: Ten Skills for Agile Leadership* (Wiley, 2019, a “Best Business Book” of 2019 selection by Soundview) and an accompanying workbook, and have a new book on ecosystem development underway. We speak at conferences and on podcasts, and write regularly on both our own websites and social media and those of others.
- **Tools:** we both develop our own offerings and partner with organizations working at the frontiers of innovation and talent development. For example, we partner with Fraunhofer IAO to bring their technology innovation tools to clients. Another tool, the AEM-Cube™ (developed by European firm Human Insight,) is an instrument that helps teams assess their “cognitive diversity” as one element of a successful group.
- **Research:** as part of a commitment to continuous improvement, we gather and analyze data about our work to better understand what works (and what doesn't), and disseminate those findings widely.

Who are the Lab's clients?

The Lab works with a wide range of companies, universities, economic and workforce development organizations, cluster organizations, and government agencies. Here are just three examples:

- **NASA:** the Lab's leadership assisted three operational areas, all in life science, to identify opportunities for cross-unit collaboration - a challenge the national space agency had been trying to address for more than a decade. Under our guidance, NASA launched several new initiatives to address shared concerns - after only three day-long workshops.
- **Lockheed Martin:** the Department of the Navy requested a roadmap to condition-based-maintenance for a fleet of its ships - with an exceptionally fast timeline. The Lab's leaders brought Lockheed together with smaller companies with unique relevant expertise and helped them create a prototype and roadmap to scale-up resulting in a successful presentation to the Navy.
- **Kauffman Foundation:** this \$1B foundation focused on innovation and entrepreneurship has struggled with helping its grantees move beyond free-standing projects to entrepreneurial ecosystem development. The Lab has worked with the foundation over the past few years on preparatory work and capacity-building, and is now helping the foundation launch a comprehensive ecosystem initiative.



How does the Lab's approach foster a culture of innovation?

The conversation can be viewed as the smallest unit of transformation. Effective conversations “roll up” into growing networks, and those networks themselves are most powerful as they connect with one another to form innovation ecosystems. Our innovation ecosystem model was initially developed in Oklahoma City and has been deployed in many regions, including Charleston, South Carolina; Milwaukee, Wisconsin; Rockford, Illinois; Mayaguez, Puerto Rico, and of course the Shoals region of North Alabama. The Lab believes that globally competitive companies and regions must develop a portfolio of collaborations as noted next:

- **Talent Development** -- In a knowledge economy, competitiveness starts with a connected community of innovators committed to building world-class brainpower
- **Innovation and Entrepreneurship Network** -- Converting brainpower into wealth and prosperity requires thick networks to speed resources to promising ideas.
- **Quality, Connected Places** -- Talented people and innovative companies need quality, connected places in which to operate. Placemaking matters.
- **New Narratives** -- The networks for an innovation ecosystem are invisible. We navigate them with stories and new narratives that point us to opportunities.
- **Collaboration** -- Ecosystems rely on a portfolio of continuously shifting collaborations. Strategic Doing widely distributes the skills needed to design and manage these collaborations.

How can you leverage the work of the Agile Strategy Lab?

You can deploy the Lab's expertise and training products to pursue your corporate goals and to strengthen the companies with which you work. This work might include:

- Customized versions of online training offerings in agile leadership and Strategic Doing
- In-person training for your employees and/or clients
- Co-development of new training offerings
- Consulting/support to you in its pursuit of an innovation ecosystem development
- Consulting/technical assistance to your partners in incorporating Strategic Doing and agile leadership methodologies

Why is the Agile Strategy Lab located at the University of North Alabama?

For fifteen years, the Lab's team incubated new approaches at Purdue University. However, top-level research universities have many assets, but speed and flexibility are not among them. To help us scale and diffuse this open-source discipline globally, the Lab now draws on the speed and agility of the College of Business at UNA. Four reasons stand out:

1. UNA leadership embraces innovation and experimentation. At UNA, the Lab's design-build-launch cycle for a new tool or online course is measured in weeks, not months or years.
2. The College of Business manages a nationally recognized executive online program; the Lab can build on this strength for a global reach.
3. The Lab can leverage a top-flight team of UNA professionals with experience in agile management practices.
4. UNA embraces Strategic Doing to build out North Alabama's regional innovation ecosystem initiative, Shoals Shift. The University achieved national awards for these efforts. Our theory of ecosystems using Shoals Shift was published in the Journal of Entrepreneurship and Public Policy.

In addition to ongoing work with Purdue, the Lab also engages with teams at a number of other universities, including the University of Michigan, The Ohio State University, Colorado State University, Indiana University, the University of Kansas, University of Oregon, the University of Puerto Rico, and New Mexico State University.



Publications and courses:

COURSE/BOOK	DESCRIPTION	STATUS	FORMAT	LENGTH
Strategic Doing: Ten Skills for Agile Leadership	New way of designing and guiding complex collaborations by following a discipline of simple rules that serve as the foundation for a new way of doing business that leads to success.	Published (May 2019)	book	188 pages
The Agile Leadership Workbook	Apply the material to your own work or studies, build your abilities with each of the skills, and make a plan for becoming a more effective agile leader.	Published (June 2020)	book	156 pages
The Practitioner's Field Guide	Companion to the book for the participants in the 2.5 day training for new Strategic Doing practitioners. It includes materials for class exercises as well as additional content outside the scope of the book to help you develop and implement your own Strategic Doing workshops.	Published (Sept 2019)	book	102 pages
Trail Map	takes you through the Strategic Doing process step-by-step. There's a page for every rule, and while you are reading helpful hints, the rest of the table sees the rule under discussion in large print.	Published (Sept 2019)	booklet	25 pages
Table Guide Training Video	Course includes all of the content they'll need – the role of the table guide, logistics, the 10 rules, and how to handle common challenges. The training consists of a series of short videos, which include shots of the standard pack and the Trail Map for those using it.	Published (2018)	Video	45 minutes
Conversations that Matter	Explore why the conversations we have are the starting point for any change.	Active (June 2020)	online	1 module (~3 hours)
Ten Skills for Agile Leadership	Learn and practice ten skills that anyone - in any organization, at any level - can use to make their interactions more productive.	Active (June 2020)	online	7 modules (~15 hours)
Strategic Doing: Leading Complex Collaborations	Learn the approach that allows new collaborations to form quickly, focus on measurable outcomes, and move into implementation immediately.	Active (June 2020)	In person (online under development)	2.5 days
Strategic Doing Practitioner Certification	Plan, implement, and follow up from a Strategic Doing workshop, under the guidance of experienced workshop leaders and with the support of fellow practitioners	Active (May 2020)	online	10 modules (~20 hours)
Building an Agile Economy	Understand how networks and ecosystems power your economy, analyze your ecosystems, and apply agile management practices to activate the changes needed for your area to prosper	Active (June 2020)	online	3 modules (~9 hours)

Ecosystem examples:

ECOSYSTEM	DRIVER FOR TRANSFORMATION	RESULTS
Water Council (Milwaukee)	Formation of cluster in fresh water technology	Water Council launched in 2009 after Strategic Doing workshop
Shoals Shift (North Alabama)	Disconnect between community and national jobs- need for higher paying tech economy positions. Need to retain UNA grads locally.	Launched ecosystem core team which guided over 25 initiatives and built a strong regional collaboration
Charleston Digital Corridor (South Carolina)	How to build a cluster of digital B to B businesses in Charleston	One of the leading digital clusters in the country, formed after Strategic Doing coaching sessions
Flint (Michigan)	How to reduce youth violence and teenage homicides	Reduction of teenage homicides; expansion of discipline to respond to water crisis and develop local food hub
Rockford Aerospace (Illinois)	Consultant identified under recognized aerospace cluster when community was seeking higher paying jobs	Built a collaboration with a focus on aerospace through talent development and training to existing small businesses. Awarded \$2.4M Fed grant that accelerated work.
Puerto Rico	Building entrepreneurial ecosystems around University of Puerto Rico Mayaguez	Discipline is expanding to other campuses in the UPR system
Montana Photonic Cluster	Local funding source sought faster results	Training and sessions held that built a website, advertisements and video projects



Past clients:

CLIENTS	COMPLEX CHALLENGE	SOLUTION / RESULTS
NASA	Lack of cross-unit collaboration in life sciences	Series of strategy workshops, resulting in set of new cross-unit initiatives
Lockheed Martin	Department of Defense request for new technology roadmap	New collaboration with SMEs with complementary technology capabilities
Cummins Engine	Collaboration needed to form future product roadmap	Used SD to implement first cross functional workshop
Eli Lilly	Strategic plan implementation for IT and need to move the orientation toward a horizontal platform for innovation.	Introduced SD as a means to promote collaborations between IT and other business units to spur innovation.
Kauffman Foundation	Lack of coherent strategy and tools for entrepreneurial ecosystem development	Training and strategy sessions for staff and grantees on ecosystem development
VentureWell, partnering with Stanford University	NSF call for undergraduate engineering students to acquire innovation skills/experience	50-university initiative, resulting in more than 500 new collaborations on- and off-campus in less than three years
Engineering Change Lab - Canada	Lack of understanding in engineering profession related to societal challenges	Toolset and trained guides for company-based teams focused on “technological stewardship”
Engineering Change Lab - USA	Need to re-invigorate engineering profession in its work to benefit society	Skills training and technical assistance for workgroups focused on specific complex challenges
Digital Enterprise Society	Lack of leadership for digital transformation in “traditional” manufacturing companies	Customized leadership development training
National Association of Research Development Professionals	Difficulty in facilitating new multi-disciplinary research initiatives	Skills training for university research development professionals to assist faculty
Puerto Rico Science, Technology & Research Trust	Hurricane Maria-related damage to economy, workforce, and educational system	Training for 40 young Puerto Rican leaders throughout the island, followed by coaching as they launched new collaborations focused on specific challenges
National Institute of Standards and Technology (NIST)	Need new approaches to improve productivity of federal R&D investments at universities.	Demonstrated how collaborations could accelerate commercialization of Federal R&D. Launched SBIR Phase Zero initiative.
Shoals Business Incubator	Low rate of entrepreneurship	Multi-faceted initiative for both local university students and small businesses
City of Trenton (NJ)	Moving from comprehensive planning to more agile planning	Developed prototype process to expand citizen engagement in the planning process.
Oklahoma City	Economic devastation following oil market crash (early '90s)	Series of voter-supported initiatives to develop new infrastructure and new economic clusters in the region
City of Charleston	Overdependence on tourism; not enough focus on innovation	Launch of Charleston Digital Corridor
Allegheny County (PA)	History of ineffective collaborations with community leaders	Skills training for Department of Public Health
State of Louisiana	High rate of maternal and infant mortality	New regional collaborations of community & public health staff
City of Fremont (NE)	Lack of skilled workforce in several key industries	Industry-specific collaborations to increase pool of skilled workers
City of Birmingham (AL)	Rising return of parolees and concern for their wellbeing	Skills training and session to develop actions forward
State of Indiana (opioids)	Lack of coordination across agencies to address opioid epidemic	Developed replicable and scalable proes to integrate education, public safety, rehabilitation and data analytics
Amgen (Netherlands)	Management team looking for agile methods to accelerate launch and management of strategic initiatives	Training introduced Strategic Doing which was immediately adopted by the management team.

Grant Experience (undertaken by ASL and/or its senior leadership):

AGENCY	INITIATIVE
Appalachian Regional Commission	\$1M grant including SD workshops, SME programming and student/business projects, to accelerate shift to digital economy
US Department of Agriculture	\$115k grant to strengthen SMEs, including training in agile leadership and business practices, student/business projects
National Science Foundation	\$15M grant to embed innovation and entrepreneurship in undergraduate engineering education \$2.5M grant to strengthen mechanical engineering education \$900M grant to train high school students from underserved communities for emerging IT jobs
National Institute of Standards & Technology	\$50k subaward through Manufacturing Extension Partnership to create photonics cluster in Montana
US Department of Labor	\$15M grant to accelerate high-skill, high-wage workforce development in 14-county region of Indiana
US Department of Commerce/ Economic Development Administration	\$150k subaward to develop leadership capacity for technology-based economic development in wake of natural disasters
National Governors Association	\$100k subaward to strengthen STEM education ecosystem
US Department of Defense	\$50k subaward to build US Army-based collaborations

Testimonials:

"I've experienced a bunch of tools and methods but nothing I've learned works to bring together a broad set of constituencies like Strategic Doing....It simplifies complexity - though that doesn't mean it's easy. But it really does simplify things."
John Morley (Hitachi Vantara)

"I've worked with other large companies trying to do open innovation, but this process is unique. This is the most clear and concise open innovation process I've seen."
Mark L. Scotland (4.0 Analytics)

"Strategic Doing allows a business to quickly identify an interested ecosystem of local businesses to solve a defined customer problem."
Todd Tangert (Lockheed Corporation)

The Agile Strategy Lab at UNA's work includes the following:

Each can stand on its own or form part of a more comprehensive change strategy in an organization.

Not sure which tools you need? Here's help.

Strategic Doing: this process helps collaborative groups form quickly, focus on measurable outcomes to address complex challenges - and move into action immediately, with learning loops to promote continuous improvement. The Lab works directly with groups and trains individuals in using the discipline.

Strategic Diversity: using the right process isn't enough if you don't have the right team in place. Strategic Diversity goes beyond the usual categories to tap into cognitive diversity, ensuring that each person on the team knows how they most effectively contribute to a larger strategy and helping teams recruit the right talent. The AEM-Cube (TM), an online assessment, can be completed in as little as ten minutes, and is available for both individuals and teams. The online work is then followed up with an in-person or video debriefing presentation to unpack the lessons learned.

Agile Leadership: available in both in-person and online versions, our agile leadership offerings equip individuals with the skills to help their organizations thrive. We go beyond "good communication" and teach ten very specific skills that innovation and transformation require - no matter what the industry or discipline.

Rapid Improvement using Lean Tools: if you have a process you know isn't helping you meet your goals - but you're not sure what to do next - rapid improvement is designed to help. Rapid improvement borrows from the lessons learned by manufacturing companies, but adapts them for companies in other industries as well as other kinds of organizations, including higher education, government, and non-profit organizations.

Agile Innovation: Powered by our partnership with German technology leader Fraunhofer, this tool (more accurately, a set of tools) help firms identify and pursue the right technology to jump to the next innovation curve.

Innovation Engineering (IE): in partnership with Eureka! Ranch, IE is a groundbreaking program that provides a systematic approach to innovation. IE allows you to build systems that make it possible, practical and easy for everyone to innovate, everywhere, in everything they do. The fundamental concepts of the program include tools and methods for *creating*, *communicating* and *commercializing* meaningfully unique ideas. IE can be taught in as few as a couple of days, or can be offered as a full university-based minor - there are many options available. Our certified black belt trainers can assist your team in using the tools to improve your organization's results.





www.agilestrategylab.org