



A G I L E V E L

PROTOCOL FOR ANALYZING, ASSESSING AND IMPROVING
AGILITY IN THE COMPANY



OK protocol guide
for assessing and improving organizational agility

AgiLevel®



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INTRODUCTION

Purpose of this document

Guide to the OK protocol for assessing and improving agile management in projects and organizations, based on the AgiLevel model.

Audience

Those responsible for agility advisory and improvement processes. Understanding this guide, and using the protocol, requires knowledge of AgiLevel.

OK Protocol

Protocols define specific procedures for carrying out assessment and improvement activities, and provide resources for doing so.

This protocol is valid for expert assessments.

Components of the protocol

- **Guide:** this document.
- **Questionnaires** with questions for gathering the necessary information from the members of the assessment team or teams: cuestionario_OK5_0_T01, cuestionario_OK5_0_F01 and cuestionario_OK5_0_S01.
- **Spreadsheet for calculating results:** Excel spreadsheets for calculating the ratings from the questionnaire information and from the weighting that the lead assessor's fieldwork advises: formulacion_OK5.
- **[EVAL](#):** online platform for completing the assessment questionnaires and calculating the results.

How this guide is organized

Introduction

Background information on the OK protocol and on this document.

Activities

A description of the activities for carrying out AgiLevel assessment and improvement processes with this protocol.

Tools for gathering and assessing the information

Instructions for the two tools you can choose from to assess the company's agility:



- **The Eval platform.** An online platform, available at eval.agilelevel.com, for running the surveys and calculating the results.
- **PDF forms and an Excel file** for recording the responses and calculating the results.



ACTIVITIES

1. Preliminary study

In the preliminary study, the assessor establishes the starting situation and the expected objectives together with the company's leadership. It determines whether the agility analysis should address the operational dimension, the organizational one, or both.

It covers the following points:

1.1. The organization's expectations and objectives

Identifying and analyzing the reasons behind the agility assessment and improvement process; the organization's expectations; and the improvement objectives it wants to achieve.

1.2. Initial analysis of the organization's general characteristics

Gathering and analyzing the background information needed for the advisory work and the assessment, concerning the organization's structural and cultural features, the characteristics of the projects it carries out, and the working techniques and practices it uses.

1.3. Early assessment of leadership support

With the information from the initial interviews, the assessor can form a first personal appraisal of the five points that make up the necessary support:

- Leadership involvement.
- Cultural compatibility.
- Resources.
- Training.
- Coaching.

2. Training the assessment team

The members of the assessment team or teams must be given the general information about the organization's improvement plan, and the training they need to take part in the assessment properly.

3. Interviews / questionnaires

If the Eval platform is not used:

The members of the assessment team must complete the following questionnaires:



- **Questionnaire on leadership support:** OK5_S01.
- **Questionnaire on the operational dimension:** OK5_T01, if the assessment scope includes this dimension.
- **Questionnaire on the organizational dimension:** OK5_F01, if the assessment scope includes this dimension.

The assessor must safeguard the anonymity of the questionnaires.

In expert assessments, the information for weighting the results can be expanded through additional interviews with the member(s) of the assessment team, carried out by the lead adviser.

If the Eval platform is used:

The platform manages the appropriate questionnaires according to the dimension or dimensions to be assessed.

4. Verifying evidence

In **expert assessments**, the information for weighting the results can be expanded by verifying the evidence the assessors observe in the artifacts, practices and working procedures used in the organization.

5. Assessment report

A document with the result and conclusions of the assessment, together with advisory information for the improvement process: areas of strength, weaknesses, and improvement actions or plan, according to the type, scope and purpose of the assessment.



EVAL

Located at <https://eval.agilevel.com/>

This application manages the surveys and the rating of the key parameters of organizational agility. Information on the model can be found at: AgiLevel.

It is a tool with free access for academic purposes for members of the [Scrum Manager professional community](#).

For professional use, a professional licence is required, which can be requested from the Scrum Manager members' area.

Registering a new assessment

On the new-assessment registration screen, you enter:

- The internal name of the assessment and improvement project.
- The name of the company.
- The name of the company area, or of the team in charge of a particular project, that is to be assessed. For an assessment of the organization as a whole, enter a name such as "General assessment".
- The company logo, to personalize the questionnaires.
- The dates on which the questionnaires will be available to the assessment team.
- The dimension or dimensions to be assessed.
- The number of people who will receive the questionnaires.

Generating survey access

This action, shown at the top of the assessment screen once the assessment has been registered, generates the fields for entering the email addresses of the members of the assessment team, to which the link for answering the protocol's survey will be sent.

Once the email addresses have been entered, the "Save" button updates the information and displays the buttons for sending the invitation emails.

Survey responses

The members of the assessment team receive an email with the survey link and a code for accessing it.

Viewing the results

In the list of assessments, the icon for accessing the results appears once at least 2 surveys have been answered. It does not appear when only one has been answered, to



guarantee confidentiality, since the application cannot reveal the answers given by any one person.

On the various tabs of the results page, you can consult the values for the dimension or dimensions assessed and for leadership support, along with a table showing the totals grouped together.



It is the direct value to be added to or subtracted from the value obtained from the questionnaires (the one shown in the "OBTAINED" column) for a given indicator.

The final value of each indicator, once the weighting has been applied, is the one shown in the "FINAL" column.

3) PARTIAL VALUES

The resulting values for the various principles of operational agility.

QUESTIONNAIRE_F01

QUESTIONNAIRE RESPONSES																									
QUESTION	EACH PARTICIPANT'S RESPONSE																								
F0101	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25
F01201																									
F02101																									
F02201																									
F02301																									
F03101																									
F03201																									
F04101																									
F04201																									
F05101																									
F05202																									
F06101																									
F06201																									

PARTIAL VALUES			
OBTAINED	WEIGHTING	FINAL	INDICATOR
0.0		0.0	Courage
0.0		0.0	Respect
0.0		0.0	Talent onboarding and development
0.0		0.0	Talent retention
0.0		0.0	Professional development
0.0		0.0	Transparency
0.0		0.0	Honesty
0.0		0.0	Safe environment
0.0		0.0	Trust
0.0		0.0	Known and shared purpose
0.0		0.0	Values-guided decisions
0.0		0.0	Self-organization
0.0		0.0	Horizontality

PARTIAL VALUES	
PRINCIPLES AND SUPPORT	VALUE
Assertiveness	0.0
Talent appreciation	0.0
Clarity	0.0
Trust	0.0
Common purpose	0.0
Non-hierarchical structure	0.0

1) F01 QUESTIONNAIRE RESPONSES

Data entry: column B contains the question codes. The responses given by the various members of the assessment team must be entered in each of the following columns, in the area marked (1) in illustration 1.

2) WEIGHTING

A column for recording the weighting value in those cases and indicators where the lead assessor has found evidence that advises it.

It is the direct value to be added to or subtracted from the value obtained from the questionnaires (the one shown in the "OBTAINED" column) for a given indicator.

The final value of each indicator, once the weighting has been applied, is the one shown in the "FINAL" column.

3) PARTIAL VALUES

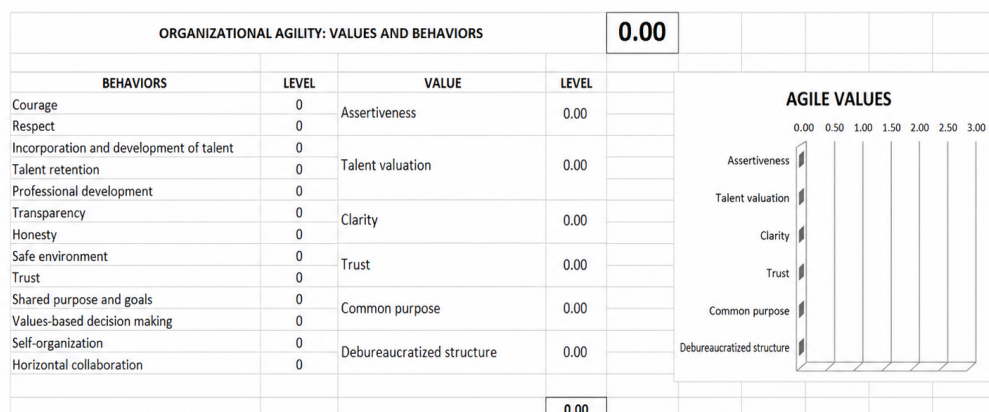
The results of the agility values in the organizational dimension.

QUESTIONNAIRE_S01

QUESTIONNAIRE RESPONSES																									
QUESTION	EACH PARTICIPANT'S RESPONSE																								
S01101a	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25
S02101a																									
S03101a																									
S04101a																									
S01101f																									
S02101f																									
S03101f																									
S04101f																									

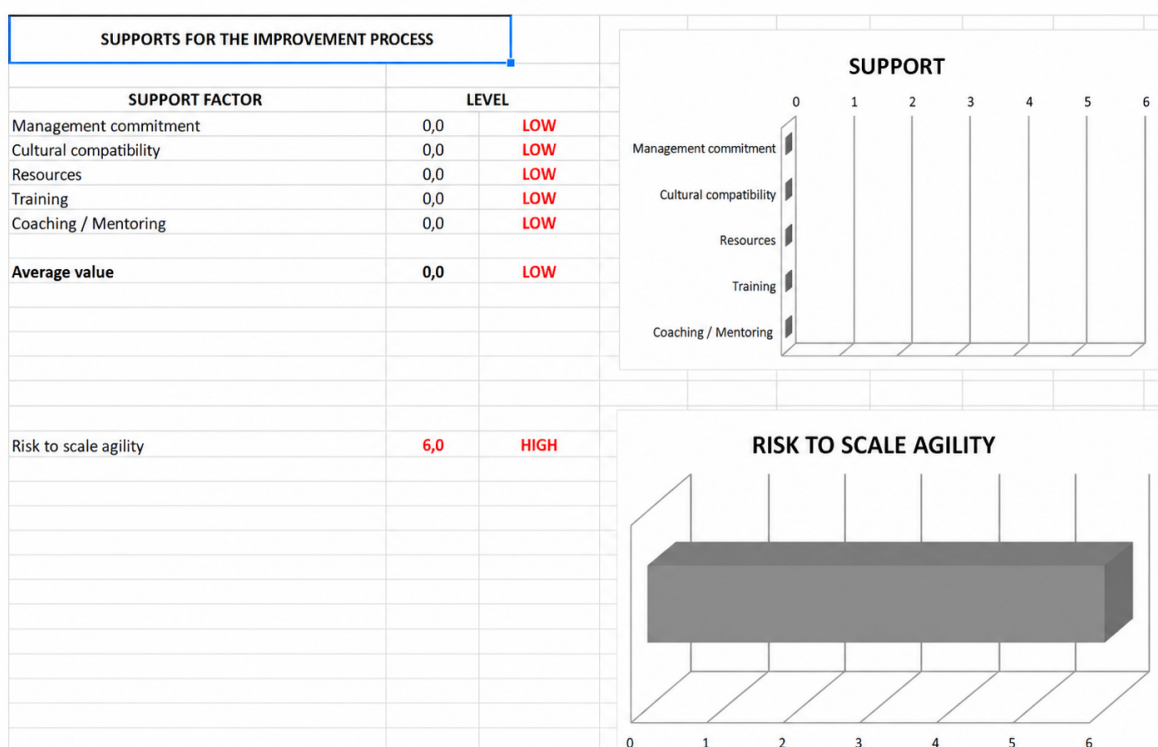
PARTIAL VALUES			
OBTAINED	WEIGHTING	FINAL	INDICATOR
0.0		0.0	• Management
0.0		0.0	• Culture
0.0		0.0	• Resources
0.0		0.0	• Training
0.0		0.0	• Support
0.0		0.0	• Management
0.0		0.0	• Culture
0.0		0.0	• Resources
0.0		0.0	• Training

PARTIAL VALUES	
SUPPORT FACTORS	VALUE
MANAGEMENT	0.0
CULTURE	0.0
RESOURCES	0.0
TRAINING	0.0



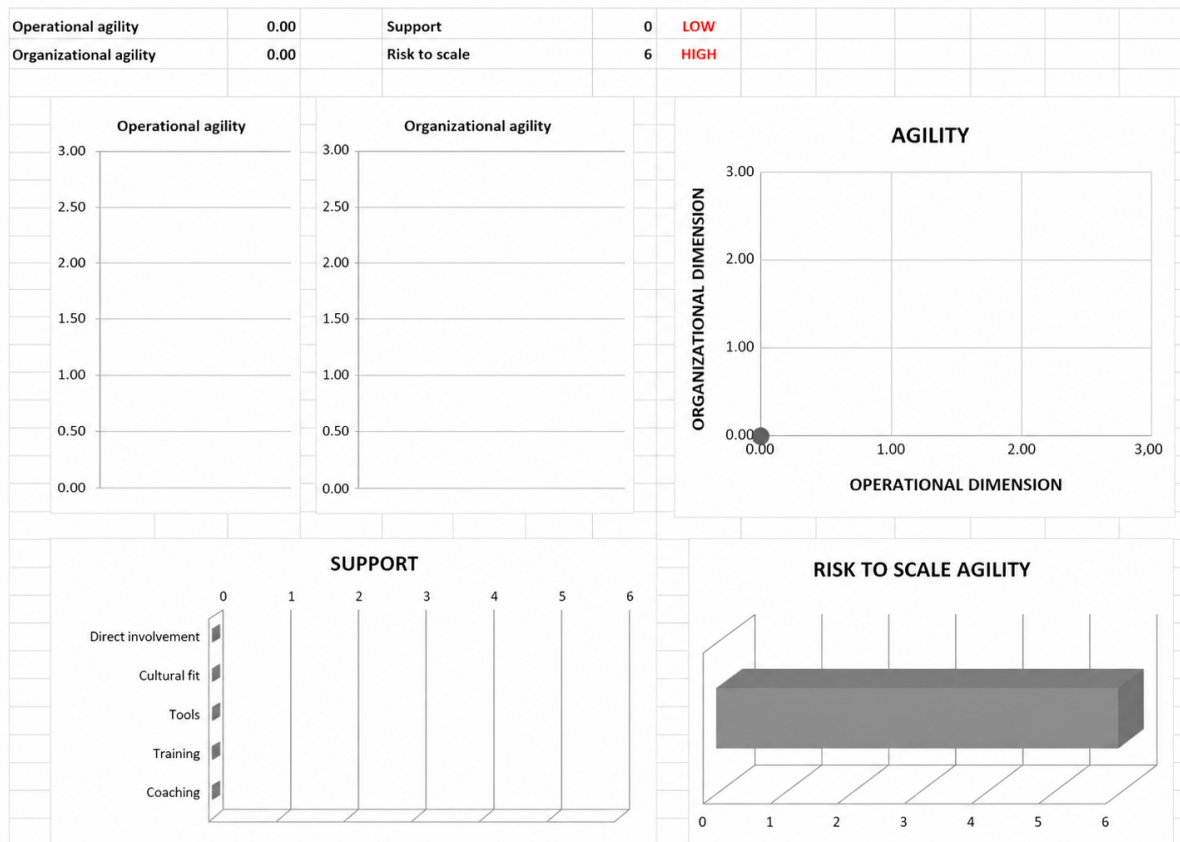
Support

This sheet shows the support results, broken down, and consequently the risk level for improving and scaling agility in the company.





Totals



Together with the support and risk values, this sheet shows the overall assessment for the dimension analyzed, or the position in the quadrant of both dimensions, according to the scope of the assessment.