When to Use Scrum and Core Values

Fractional integrator Lloyd Thompson discusses methods of project management and how core values impact team collaboration and results in a business.

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James: James Schramko here, welcome back to SuperFastBusiness.com. This is episode 881. Today, we are continuing our discussion around the role of fractional integrator. I've brought along my special friend/guest, Lloyd Thompson from virtualdoo.com to talk about this again, welcome.

Lloyd: Thanks for having me back.

James: So just a quick recap, Lloyd, we spoke last time on Episode 875, which was The Rise of the Fractional Integrator, and we more or less covered what a fractional integrator is. We talked a little bit about meeting formats and hinted at what Kanban is. And we talked about how you might go about hiring an integrator and what kind of systems to use.

So I wanted to go a little bit deeper today, get into some softer subjects, and also some more technical subjects and see where we go with this episode. But I think in order to move forward, it's sometimes worth having a look at the past. And I'd love to just get a little bit deeper on your past life transition into this role, and how much of what you did before is informing and guiding your skill set for your current role?

From software developer to people leader

Lloyd: Sure. So I started my career as a software developer. And eventually, that transitioned into a technical leader, overseeing, solving technical problems, and then eventually, a people leader, who would manage people challenges.

And what I noticed is that when there's a problem, for technical issues, and for people challenges, quite often, the facilitation method is actually the same. And it involves getting the people together, understanding the goal, the objective, what we're trying to achieve, the current situation and what the options are.

Moving into the integration space is actually quite similar. There might be different areas that we're dealing with, such as manufacturing, logistics, marketing, R&D, but the problem solving method is the time. So in saying this all, actually having a technical background, when working with online businesses, has actually been very helpful.

James: Yeah, I can see that. It's been such a natural fit. And I've been in the great position to watch you just take it on. And what has impressed me is just how smoothly it's gone. And especially because I know a lot of your clients, they are people who will be listening to SuperFastBusiness, people who I work with closely in SilverCircle, or partners. And you come in, and then I see their business lift, because for a lot of visionaries, that was sort of the missing thing.

It's like, they've got this big block V8, and they're hitting the accelerator, and they're just sitting there on the spot, doing burnouts. And you come in there with some traction control, saying, Okay, I know how this can work.

Now, some of the things you do when you get into a business is, you set up little systems, and we'd sort of call this the toolkit of an integrator that you would have brought across from your previous roles as well. We talked about Kanban in the last episode. And we also mentioned, I think, Scrum, but we didn't really go into that.

The Kanban method versus Scrum

So I'd love it if you could just dive into your toolkit for a second and talk about these two tools that, in some cases, someone listening to this episode may not be doing either of these, some people might have a very basic version of one of them, maybe Kanban. And some people will be like, well deep into it but are just wanting someone to help them guide them with it. So let's just have a little bit of an overview of these two tools.

Lloyd: So actually, last time, we talked about Kanban. And that's good for visibility. If you've got the same steps each time, if you've got a cookie cutter project, you can get great transparency of where the tasks are at, what step in the pipeline are there. So cookie cutter projects, that's ideal for Kanban.

Scrum, well, that's better when it's not the same shape every time. And so I choose between Scrum or Kanban, really, depending on the application, depending on the project. So with Scrum, you look at prioritizing value. You want to fix the scope for a period of time, so typically 10 days. And this enables all of the team to work on the same things together through a period of time. And we call that a sprint. And I've actually used this recently for a team creating content for advertising campaigns, and it's made a big difference to productivity.

Now, for both Kanban and Scrum approaches, they're not completely the opposite. There are a number of things that you can do for both together that will make things run lots more smoothly. So for both, it's important to have some kind of daily haul or a standup, make sure you know what's blocked or who's waiting on what.

It's good to have reviews and retrospectives to see how successful our planning is, or check the output and see if there's any opportunities for improvement. It's good to go back through all of your tasks periodically, the things that are in your waiting queue, your backlog that are going to be coming into the pipeline next, and ensure that there's enough info in there to allow people to get going.

Let's talk about task hygiene

Actually, while I'm on the topic of task refinement, I might just go down a bit of a rabbit hole on task hygiene, ticket hygiene in particular.

James: I was watching Alice in Wonderland last night with my daughter.

Lloyd: Going down the rabbit hole, huh?

James: And it was wonderful. It's so creative. Yes, let's go down the rabbit hole and see what we find.

Lloyd: Here we go. Here we go. So down the rabbit hole we go. Task hygiene. So if the tasks aren't dealt with properly, if they're not given the right information, people can be blocked from getting going. Or they might make assumptions because they haven't gotten enough information. So it's either going to block productivity, or it's just going to - well, it will block productivity, they might just go down the wrong way. They'll make an assumption, they go down the wrong way.

So a few things I would check for there in one of these task hygienes, a refinement session, if you like, is make sure that tasks are assigned to one person, and one person only. I think we mentioned in the previous episode, if two people are accountable for someone, something, nobody is. So just making sure a task is for one person, one thing only.

Due dates, when does this task actually need to get done by? Priorities. Is this the most important task that we should be working on right now? Is there enough information in the ticket? So a good thing to put in here is some kind of acceptance criteria. And so this is a list of true statements that will be true when the task is completed.

Who's going to close the task? Or is it just going to sit there? So who's going to close the task? And why would they close the task? They might close it because they're the person that's going to do the quality check in the end, or they might be some kind of internal customer, go, Yeah, I'm happy with that. Thanks. I'm closing it, or, You know what, no, I'm not happy with that. Back up the track, you can have it back. Let's do that again. So who's going to close that?

And then before you get into all of this, estimates. So you may have heard of things called story points. That's one method. Personally, I'm not a huge fan of story points. I like really simple method, I like just days, quarter days, half days, a small number of days, not into weeks or months, just to keep it simple. So that's the task hygiene. And so those are the areas that I would use for both Kanban and Scrum.

James: These sound just amazing. I know someone's listening to this thinking, Oh, my god, I want this in my business. Because the things you've just described, they're missing from a lot of these small businesses that I coach and that we work with. And I know that visionary types are generally not going to be the one who's going to do this, they're not going to learn this.

They may want to hire for this, and that's possible. And I know you and I have actually helped people even hire people to come in after you've come and cleaned up and set up. And that's cool. But having someone inside there who knows this and setting up is so desirable. This is episode 881. I'm chatting to Lloyd Thompson from virtualdoo.com, and he's an expert in helping visionaries get everything working smoothly in their business.

What sort of team does an integrator have?

Now, when we started this business venture of yours, Lloyd, it was just you. And you and I were talking about how we can integrate your methodologies and background into my client base. And it worked so well that you've expanded.

Do you want to give us a little view into the sort of team that you've assembled and what sort of things they're doing within your business now? Because I think that informs us as to what kind of functionality we might want in our own business, or certainly if we're getting someone to come in, like VirtualDOO, to be our integrator on a shared basis with other people. What sort of things could we expect from a team point of view?

Lloyd: So my first hire was another integrator, and she has been kicking my butt and shaping VirtualDOO for the better, ever since. Absolutely fantastic.

James: I'm laughing because my podcast producer just contacted me and said, I'd love to get that episode 881 that you've got earmarked with Lloyd, and I said, Yes, I'm just about to record that. So you need these people in your life.

Lloyd: Yeah, she's very motivating. You know, I think I'm pedantic, but she's on top of things as well, and she's like, Oh, there's a gap here. We should really do it like this. And fractional integration is good for her because she works remotely in regional Australia, she's in the absolute middle of nowhere, we call that woop woop here in Australia, she's surrounded by cows and sheep, she's able to spend a lot of time with her family and yet still provide an excellent service for VirtualDOO and on behalf of VirtualDOO.

James: Yeah, that's great.

Lloyd: And since then, we've expanded our team, we've now got someone who's an integrator in Argentina. And that's been beneficial because that allows us to have more timezone overlap with the US and Canadian clients that we have. We have a support person who provides project services such as reporting, reconciliation and other project management services. And we also have a tech lead and a developer providing some software development for us. And this actually isn't our core business. But we're helping someone with some development work, because we knew that we could solve this problem for them.

James: I knew that you could solve this problem. I think I was involved in a referral there, because I'm like, Would you like to speak to someone and put together hundreds of millions of dollars' worth of software projects from all around the world? And my prospect said yes.

So why don't we talk about the kind of clients you're working with? Because what I'm seeing is you've basically got your toolkit, and you're able to front up to new clients and have a look at what's going on. You very quickly figure out where they're at. Are they in massive trouble? Or are they running like a well-oiled machine, but just need a few little tips and tricks? And then you're bringing in the right team members to complement their service.

The sort of clients Lloyd is helping

Give us a sort of representation of the type of clients you've been helping to see if we fit that criteria.

Lloyd: It's a bit of a pick and mix, but they are all online services. So one is an e-commerce giant. They're shipping products worldwide. Our integrator works directly with the CEO and the leadership team. And that would include key roles such as global operations, encompassing manufacturing, shipping, R&D. They'd work with HR, IT, sales and marketing, creative department and finance. So that's one client, one shape.

And then something a bit different. We're working with an SEO business. And so again, the integrator works direct with the CEO or founder, visionary, and a bit of a different leadership team they're dealing with there, so sales and marketing. This time, they've got an account manager.

And account managers, we actually recommended that, the account manager placement, so the account manager is working with the external clients, and getting the updates and making sure they're being looked after. Generally, the integrator is looking after the internal team and the vendors. So having an account manager is a great addition to a team.

We're working with SEO experts, content production, podcast production and YouTube production. So that's the SEO business. And I like to point out that one of the things we do, as a business grows, is look for, if there's a gap, we think, in the business, and we say, Hey, look, we really think that, for example, you need an account manager. So that's something we do, look at the roles and responsibilities, look what's missing.

James: Well yeah, you'd know straight away, Oh, hang on, I've worked in other business, there'd be this role. Like the client account manager, it's a great example where, I know I've podcasted about this topic specifically, because that's what brings agencies undone. Almost every agency owner, at some point, is going to say, I hate this business, because I have to talk to clients.

And I'm like, Do you realize you don't actually have to talk to clients? And they're like, Tell me more about that. So if you went into an agency where they didn't have client account managers, and the founder is struggling to try and keep up dealing with all the clients, you might say to them, Hey, why don't you get a client account manager, because we've seen that work well before?

Lloyd: Yes, absolutely.

James: So because you've got eyes on other businesses, you start to get this data that you can benchmark and compare and point out gaps instantly that a business owner might never discover or take a long time to figure out.

Lloyd: Yeah, absolutely correct. Just to give you the full picture about the clients, I guess the odd one out that I just mentioned earlier was the one where we're doing software development, but that's a capability we do have. So we are working with the video marketer. And again, we work directly with the CEO there. And we're providing technical leadership and software development.

And we're busy automating some manual steps that would've taken hours before, that were manual, and getting this down to minutes. And that allows them to serve more customers and provide faster responses to their existing customers. And so it's not really our core business, but it was a problem that we could solve, so we took that on.

James: Yeah, and I think from memory, you were so efficient with it that the founder was, like, having to keep up with you. Because usually with software, you're expecting it to take a long time and cost a lot of money. And you just came in with all this existing knowledge and the right team members, and just demolished it straightaway. So that was like, really encouraging. And I had such good feedback around that.

Lloyd: He was a fantastic client. One of the roles, unfortunately, we've had to have him submit some forms to the people who were going to provide some technical service to us that he's getting some information from Google. And so we've said, Hey, we really need you to fill out those forms for us, we can fill out the details, and everything we know, and we recommend, but you need to submit the rest. So we were politely asking him to do that. And he's been a fantastic partnership working with us.

James: One of the things you would see, obviously, on the softer side of it, we've talked about some of the tools, and we've talked about some of the client profiles. I imagine each of these businesses at different levels when it comes to their core team, like almost everyone you're working with has an existing team.

How important to a business are core values?

Most of them are getting you involved to coordinate their team better and make things run on time. Do you encounter these teams having core values when you get in there? Or is it something that you believe strongly in or that businesses should even have?

Lloyd: I highly recommend having core values. I have core values in my own business. As someone working with the business, when we're coming in, it allows us to know what good looks like, are we fitting in with your business, are we gelling with you? But it also, for our business or for the clients, it makes sure that we've got the right people. So the right people is the core values, they fit core values. And they follow those core values.

And the right seats is the second part. So right seats is once they have got the core values, the right seats is they get the role, they want the role, and they've got the capacity, the time and the skill to do the role. So core values are incredibly important. If I'm talking to a client, and I don't know what their core values are, I'm going to ask, and I'm going to highly recommend that that's one of the first things they do, is get those core values down and make sure that every employee in the business knows what their core values are, so that they are aligned.

James: Do you have core values at VirtualDOO?

Lloyd: Absolutely. I'm happy to expand on a couple of them, if you'd like.

James: I think it'd be a great example. I mean, this is something I feel quite strongly about too, because it's what helped me transform motor dealerships before I came online. We got trained by someone who was a high-level corporate trainer who explained about core values to us. We installed it. I brought it into my online business.

My own team have got great core values, which is why anyone who's ever dealt with our support has had a good timely response. My team communicate well, they have the utmost integrity. They're good at what they do.

And they're really good at collaborating, which is why we don't have such structured roles in our business, because we've taken on some of the attributes as me the founder, and then we've added in some of the skills that means the founder can't bring to the table. You know, like they're going to go and research and study tutorials and things to be ninja good at what they do. And I'm going to focus on being ninja good at what I do. It's one of our values, is to be ninja good.

The other one of our values, which is critical in a role like ours, is confidentiality. We can't share confidential information of our clients or any of our protected intellectual property with people outside the business. It's even one of the reasons we don't list our team on our website.

And a lot of people don't realize this, when they're listing their team on the website, that can go well against them, as well as for them. It creates vulnerabilities for hacks, it creates poaching opportunities for nefarious employers to steal databases and so forth. So we like to operate out of our quiet little bunker. Why don't you share with us your core values?

Lloyd: Yeah, sure. So one of them would be owning it and making it an art. And I'd like to just expand on work versus art. I'm trying to think where I got this from, I think it might have been Getting Things Done, which was, I think Brian Tracy wrote that book. So work is what you're asked to do. You know, can you get this done? Can you get this done?

"We want people who take pride in their work, choose their own adventure and get to that outcome in the best way that they can."

LLOYD THOMPSON

I don't really think anyone really wants to be a worker. Art is where you know the outcome of something, and you can then use your art to get there. So we want artists, we don't want workers. We want people who take pride in their work, choose their own adventure and get to that outcome in the best way that they can. So owning it and making art, I want artists. So that's the first one.

James: You got me thinking of your surfing here.

Lloyd: There's a lot of improvement needed.

James: You draw lines on the waves as you're dodging all the other surfers on the way through it. You know, like, I just wanted to sort of side by here a little bit. Part of the reason we've become friends and business partners is because of your personal values. And with these small businesses, our personal values come through our business, and people can get a vibe off you.

They know if you're a shady criminal, or if you're a good person, through your actions and the way that you interact with others. But I've always found your personal values very high. And that's made it sort of magnetic for me, like I like doing projects together because I know that your values mean that I can refer with confidence and trust that I'm maintaining my own extension of my own values that I have with my own clients.

I want that integrity and the trust, and a long term relationship. And I won't do anything that damages that, including my sphere of people who work closely with me.

Lloyd: Thank you so much.

James: Yeah, well, bottom line is I think great values magnify and create more opportunities. That's really my point there. What else does your team have as a core value?

Why enabling others is key to rising up

Lloyd: Similar to one what you mentioned about collaboration, actually. So I've got one, eagerness to learn new skills and enable others. And the second part, and enable others, is really important, because I've come across a great many experts who are super at what they do, but not so good at enabling others, and we want people who can learn new skills, and then help the team learn. So real team players who just want to help everyone rise up.

James: It is such a big one because firstly, a lot of the reason people might need an integrator is because as a founder, they are hanging on to things. And they will often use excuses like, Well, no one else can do it as well as I can, or, This is too valuable to share, etc., and they cling on to stuff. So they're not enabling anyone, which means they're actually not enabling themselves. It's a Catch-22.

And the other thing that you find, often, if you have a poor employee, they might actually start, they try and create their own black box. They think they're making themselves irreplaceable by not sharing, and not helping other people, and not making sure there's redundancies within the business.

What they do is they actually put themselves on an island, they have their personal little fiefdom. They don't want to share, they don't want to communicate, they don't want to let anyone else onto their island, or tell anyone else what they're doing. But they are a massive liability in a business. And you and I have both seen this.

We've talked about this, Lloyd, where if a visionary gets too compromised by someone who won't share and won't enable others, it actually becomes a bit of a cancer that will cause a negative result that ripples across the whole organization. If you permit that to happen in your business, then you're asking for trouble.

Lloyd: And I would like to say, too, I remember listening to Alan Moss, who was the CEO of Macquarie Bank, which is a quite well-known bank here in Australia. And they were asking, one of the questions that came from the crowd was, you know, what's one of your top tips for success in this company? And he said, Make yourself redundant and step up while you can.

What he meant by that is, if you want to rise up, enable your team. If you've got across all these processes, you run them, and you can enable everyone else, then you can create an opportunity for you to rise up. But if you're bogged down in the existing, you can't go anywhere, you're too valuable in that one post.

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"If someone's just hanging on to something and not letting it go, then they're really trying to just lock themselves into a post and they can't go any higher."

LLOYD THOMPSON

So particularly for a leadership team, if someone's hanging on to something, and that's certainly not a behavior I'd expect in a leadership team, if someone's just hanging on to something and not letting it go, then they're really trying to just lock themselves into a post and they can't go any higher.

James: You know, this also applies to the service provision for a business. Some service providers, you know, like maybe therapists, or bad coaches, they want to keep their customers dependent on them; lawyers, some of them seem to love this one. Like, let's keep having a relationship. We'll keep firing up the war so that this war chest needs funding. I'm half-joking there.

But you know what I mean, like, as a coach, if a client of mine solves all their problems and has massive success, that is the greatest outcome possible, not if they're continually needy of the resource or can't survive without it. So that really is an interesting trait, a rare one, but a great one.

And I can see you're hiring with the same attribute you have, and it will reflect through to your clients. You'll create that ripple effect with their culture where suddenly, instead of everyone trying to cling on to their job like a life raft, they're actually sharing and caring and enabling, and now the whole thing actually rises and there is no emergency. I like that.

The continuous improvement of processes

Lloyd: I've got one more for you. So, driving initiatives to improve processes. So this is really important for VirtualDOO and our clients. And so we're ultimately facilitators in a lot of our engagements. And so part of what we're doing is identifying pain points, listening to the team. And one of my clients, actually, he talks about, and I love this quote, one of his core values is get one percent better every day. And he really lives this quote, he really does.

And every opportunity, he talks to the team, he reminds everybody, get one percent better. So that core value is absolutely known throughout the team. I've heard this being also called Kaizen, a Japanese term. So I've really just taken that from him, I love that value. And I bring that into my team.

James: I think it might even be part of Brian Tracy's winning edge concept.

Lloyd: It might be. I've read a couple of Brian Tracy's things there as well. So yeah, that one about driving initiatives, process improvement. And just on that, actually, when we come to process improvement, it is difficult to drive change. And convincing people to make change is difficult. But in that, we train our team how to do it too.

So quite a lot of the time, people believe their own data, whether it's decision making or behavioral, they believe their own data. You have to show them the data to make them believe it for themselves, you can't generally push a view onto someone. And so, what we aim to do is make that data available to them in a way that they can digest, and then they can make a decision based on that. So that's how all the values tie into our working practices.

Wrapping up the episode

James: I love it. This has been a really nice little overview. We've talked about values, we've talked about some of the tools in your toolkit, some of the types of clients you work with. If you're listening to this, and you think you might need the services of an integrator, of course, I would recommend Lloyd and his team these days. You can access him at virtualdoo.com.

Lloyd, I appreciate you coming along and sharing this. And thank you for looking after my clients so well. And I hope that your business continues to grow so successfully, as it has in 2021 into 2022. I imagine it's going to be a tremendous growth year for a lot of online businesses, as we progress further down the sort of opening up and getting back to bigger and better commerce opportunities, and I'm sure there'll be plenty more opportunities for you to get in there and show them how it's done right.

Even if, and this is an important one, even if it's a predetermined sort of window, where you come in, clean up, set up, get things running, and then over time, help them obsolete your own service. I mean, this is part of your core values that, again, just going back to what I was saying before, you're not in there to try and do it for them to the extent where they can't live without you.

Ideally, they'll get such a strong muscle with this that one day down the track, they can decide if they want to bring somebody in or not. Or they can just sustain with the program. And certainly that's a completely valid position, because it's way cheaper to hire a fractional integrator than it is to shell out big coin for a Chief Operations Officer or whatever, or someone who's a graduate of one course, and they know one way.

When you get a contracted service like VirtualDOO, you're actually getting access to a team, you're getting years and years and years' worth of experience in all different methodologies. And most importantly, you're getting access to the data set and benchmarking capability of knowing exactly where your gaps are straightaway. So that's why I think it's a really good move, smart. Thanks, Lloyd.

Lloyd: Thanks so much for having me on the show again.

James: My pleasure. I hope we get you back. If you've got a question for Lloyd, flick an email to me, james@SuperFastBusiness.com. I'd love to send them over to Lloyd for him to prepare. And we'll answer them for you. And in the meantime, I hope you catch a few nice waves.

Lloyd: Thanks, James, you too.

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